Performance and Professional Growth Guide

Non-Bargaining Support Staff

For use by
Supervisors, Managers, Directors, Principals, and Superintendents
Who Supervise Non-Bargaining Support Employees
(both salaried and hourly)

BREVARD PUBLIC SCHOOLS
2700 Judge Fran Jamieson Way, Viera, FL
32940
Dear District Employee:

Brevard Public Schools is committed to excellence in all endeavors which benefit our students and help them strive toward continued educational achievement. For most people, it is clear to see how the performance of our instructional employees—teachers and school administrators—directly impacts success in this mission. For other employees who are responsible for the myriad activities associated with the business of running a school district, the line of sight between themselves and student achievement may be harder to discern, but it is no less critical to BPS’ position as one of the highest performing districts in the state, if not in the country.

I am pleased to present Brevard Public Schools’ new Non-Instructional Non-Bargaining Performance Evaluation and Professional Growth system designed to ensure the professional development and performance evaluation in critical disciplines including community relations, facilities, finance, food and nutrition, human resources, security, information technology, and transportation. It was developed by a cross-functional team representing these disciplines and designed to support the district’s strategic goals and mirror our operating values of collaboration, teamwork, integrity, respect, and accountability. The system focuses strongly on individual development and continuous improvement—using one’s education, skills, and experience to effectively establish work objectives aligned with the district’s strategy and performed with high levels of skill.

The system also insists on ongoing dialog between supervisors and their employees, all intended to clarify expectations and emphasize important behaviors that are key to long-term, sustainable success, both of our employees and our district.

I know you will find the following pages which describe how this new system works to be many things: enlightening, logical, structured yet flexible, and extremely helpful as you fulfill your role at Brevard Public Schools. This new Non-bargaining Performance Evaluation and Professional Growth system is certain to help you succeed.

Sincerely,

[Signature]

Brian T. Binggeli, Ed.D.
Superintendent
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Glossary of Terms
Introduction

When performance management activities are integrated and coordinated in an on-going cycle, organizations have the best chance to succeed. Some important elements of performance management include those shown on the visual below:

The Non-bargaining Support Staff Performance and Professional Growth System focuses on two of the “gears” in the performance management “machine”:

The purpose of the Non-bargaining support staff Performance and Professional Growth System is to develop, improve, and enhance skills, as well as assess the performance of the district’s staff. And best-in-class systems ensure that the following attributes are included in an effective system:
• Provides for collaboration between the supervisor and the employee.
• Establishes individual goals and objectives.
• Focuses on employee Professional Growth with emphasis on the shared responsibility for its accomplishment.
• Provides both qualitative and quantitative feedback.
• Is a continuous, multi-faceted process, not a once-a-year event.
• Is applied consistently.
• Includes training on how to optimize the process.

This guide will present each of these key attributes individually with many examples, tools, and process instructions provided to make the system as understandable and easy to use as possible.

This system is intended to be used by district staff outside of the instructional world. These primarily are the business functions responsible for running the district, such as child care services, finance, facilities, human resources, information technology, food and nutrition, transportation, and security.

The balance of this guidebook will provide detailed information on all of the system’s elements and how best to use them together to ensure achievement of the program’s objectives.

**Key Process Elements**

The Non-bargaining Support Staff Performance and Professional Growth System includes the following key elements, which will be discussed in great detail:

• Individual Objectives (the “What” of an individual’s performance)
• Job Dimensions (the “How” of an individual’s performance)
• Individual Professional Growth Plan
• The Performance Management Cycle
• Systems Support: Training and Tools
• Forms and Processes
How Does All This Happen?

The Non-bargaining Support Staff Performance and Professional Growth System is intended to be aligned to the district’s strategic plan. The following illustrates the cycle to be followed at Brevard Public Schools:

A total of two to three meetings would be held each year: Step 1 (April time frame) includes establishing goals and objectives for the upcoming year; Step 2 (October time frame) is a mid-year progress meeting to review expectations, make any needed adjustments, and discuss ongoing training and development activities; and Step 3 (April time frame) is delivery of the final performance evaluation. Steps 1 and 3 could be combined into one meeting—to close out the prior evaluation period and to begin the new one.
Step 1: Establish Goals for the Year

Objectives: The “What” of Individual Performance

At the beginning of the performance cycle, individual job objectives and development goals will be established. This is a high level list of four to five key areas in which the employee will focus his or her energy in accomplishing objectives, rather than a list of all the tasks the employee will complete. These will be recorded on the Non-bargaining Support Staff Performance Appraisal form found in Forms section of this guide.

The following describes the steps that will help ensure a good start to the annual performance evaluation process.

Prepare

Review supporting documents to develop appropriate and relevant performance expectations for each employee.

A review of the following, prior to conducting the meeting, will help establish relevant goals and objectives for the upcoming year:
  • District’s strategic plan.
  • Employee’s current job description.
  • Employee’s previous performance evaluations.
  • Feedback from other’s regarding employee’s performance.
  • Previous dialogues with employee regarding his/her objectives.
  • Employee’s workload and current results.
  • Team’s workload and current results.

Define Objectives: At least one objective will be directly tied to student achievement.

Developing SMART Objectives

One way to develop well-written objectives is to use the SMART approach. This acronym stands for the following:

  S - Specific
  M - Measurable
  A - Achievable
  R - Relevant
  T - Time bound
Developing specific, measurable objectives requires time, orderly thinking, and a clear picture of the results expected from program activities. The more specific the objectives are, the easier it will be to demonstrate success.

Specific — What exactly are we going to do for whom?

The “specific” part of an objective tells us what will change for whom in concrete terms. It identifies the population or setting and specific actions that will result. In some cases, it is appropriate to indicate how the change will be implemented (e.g., through training). *Coordinate, partner, support, facilitate, and enhance* are not good verbs to use in objectives, because they are vague and difficult to measure. On the other hand, verbs such as *provide, train, publish, increase, decrease, schedule,* or *purchase* indicate clearly what will be done.

Measurable — Is it quantifiable and can we measure it?

“Measurable” implies the ability to count or otherwise quantify an activity or its results. It also means that the source of and mechanism for collecting measurement data are identified, and that collection of these data is feasible for your program or partners. Another important consideration is whether change can be measured in a meaningful and interpretable way given the accuracy of the measurement tool and method.

Achievable — Can it be done in the proposed time frame with the resources and support available?

The objective must be feasible within the available resources, appropriately limited in scope, and within the individual’s control and influence.

Relevant — Will this objective have an effect on the desired goal or strategy?

“Relevant” relates to the relationship between the objective and the overall goals of the department, division, and district. It should be evident that accomplishment of an objective will have a positive impact on strategic intent.

Time bound — By when will this objective be accomplished?

A specified and reasonable time frame should be incorporated into the objective statement. This should take into consideration the environment in which the change must be achieved, the scope of the change expected, and how it fits into the overall plan. It could be indicated as “By December 2014, the program will...” or “Within six months of receiving the grant...”
Assigning Weights to Individual Objectives

In order for employees to understand the relative importance of goal achievement during a specific evaluation period, it is important to assign weights to each of the four to five objectives in terms of both the size, importance, and/or urgency of the objective. These normally are assigned as a percentage of 100, with all objectives’ weights equaling 100.

Recording Established Objectives

The Non-bargaining Support Staff Performance Appraisal form, found in Appendix A of this guide, is used to record the agreed-upon objectives for the upcoming review cycle. A copy of this form is kept by both the supervisor and the employee. Should the work situation change, the two can reconvene to discuss the continuing relevance of the established objectives and to make any adjustments during the cycle as needed.

This form is kept in the work area and is not forwarded to Human Resources.

Job Dimensions: The “How” of Individual Performance

The second part of Step I states that for the employee to succeed at reaching the established objectives, he or she must understand the behaviors and skills or Job Dimensions that BPS believes are important to success. An important part of the objective-setting meetings is to discuss these important skills and behaviors in the context of how they will help the employee achieve his or her objectives.

The Job Dimensions that have been identified for Non-bargaining Support Staff positions are as follows:

- Technical Skills/Work Habits
- Initiative
- Communications
- Judgment
- Customer Service
- Teamwork

Once it is time to complete the annual performance appraisal (covered as Step 3 later in this guide), the following rubrics are used to assess the level of performance in each of the Job Dimensions:
<table>
<thead>
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<th>Highly Effective</th>
<th>Effective</th>
<th>Needs Improvement/Developing*</th>
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<td>Demonstrates strong performance in most key elements and behavioral evidence of this job dimension.</td>
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*For the first year in a job assignment, performance at this level should be designated as Developing.

Each of the Job Dimensions is assigned a weight. When the annual performance appraisal is completed, the supervisor assigns an overall performance rating to each Job Dimension, which in turn defines how much of the weighted amount the employee’s performance has achieved. All of the achieved weights added together result in an overall performance rating ranging from Highly Effective to Unsatisfactory. The assigned weights for each Job Dimension are as follows:

<table>
<thead>
<tr>
<th>Job Dimension</th>
<th>Weight</th>
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</thead>
<tbody>
<tr>
<td>Technical Skills/Work Habits</td>
<td>20</td>
</tr>
<tr>
<td>Initiative</td>
<td>20</td>
</tr>
<tr>
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Each of the following sections of this guide addresses one of the above six Job Dimensions in great detail in terms of definition, key elements of the dimension, observable evidence of the dimension in action, measuring performance, skill enhancers, personal growth activities, and specific training. These sections are valuable to both the supervisor and the employee in understanding the definitions of each of the Job Dimensions and by providing suggestions for enhancing skills and growing professionally in each one.
Technical Skills/Work Habits

Possessing the knowledge and skills necessary to accomplish the purpose and objectives of an assignment.

Demonstrating the approach to completing tasks that ensures quality and productivity in one’s work. Caring enough about an organization to give it your all.

You’ve worked hard to get your job, and your employer is willing, in exchange for your contributions, to give money for your sustenance and that of your family. In return, employees owe employers their very best in terms of knowledge and skills needed to get the job done, as well as professionalism in approaching the work environment as demonstrated by high standards and a positive attitude. It’s one of the best ways to move ahead in any organization.

Key Elements of Technical Skills/Work Habits:

- Follows policies and procedures using all available district resources safely, respectfully, and ethically to complete tasks with the goal of being error free.
- Consistently demonstrates competency in employee’s core trade or profession.
- Works to remain knowledgeable and up-to-date on the industry’s current best practices.
- Maintains good attendance. On time to work and meetings, observant of work schedules, and meets deadlines.
- Dependable; can be counted on to prepare and effectively execute tasks/assignments at all times.
**Behavioral Evidence of Technical Skills/Work Habits:**

- Demonstrates the ability to put into action any formal education and/or skill training possessed.
- Handles on-the-job technical challenges with skill and effectiveness.
- Uses technical skills to generate ideas for process, procedure, and operational improvements.
- Can explain highly technical information in a way that is understandable and interesting.
- Willingly shares technical expertise with others to help them improve their performance.
- Completes all tasks and assignments on time without prompting and with the appropriate priority.
- Stays up to date with the latest trends and developments in his or her field of expertise.
- Arrives at work and to meetings on time, and adheres to established work schedules, including break times.
- Completes all administrative “paperwork” including online data entry (for example, submitting time sheets) correctly and on time.
- Respects employer’s property and uses it wisely, appropriately, and ethically.
- Operates all equipment observing safety requirements.
- Exudes a positive attitude, respects others, and never participates in workplace gossip.

**Measuring Technical Skills/Work Habits Performance**

Consider the key elements and behavioral evidence of Technical Skills/Work Habits when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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Technical Skills/Work Habits Skill Enhancers

- Make sure you have the formal education and/or training required to do the job. If any of these are lacking, do what it takes to shore up knowledge and skills, such as taking night, weekend, and/or online training.
- Subscribe to a professional association journal in your area of expertise to stay abreast of new developments.
- Identify someone who demonstrates a high level of technical skill in your area of interest and ask him or her about how those skills were attained.
- Ask a coworker to observe your application of your technical knowledge and then provide honest, straightforward feedback.
- If you struggle to arrive to work and/or meetings on time, set a quiet alarm reminder on your phone or computer at least 15 minutes prior to the time you are due. When it goes off, stop what you are doing to make the appointed time.
- If you are challenged with completing administrative tasks on time, begin completing them 24 hours ahead of schedule.
- If you’ve solved a particularly challenging technical issue, proactively share your accomplishment with at least one other coworker in your field.

Professional Growth Activities

- Identify an associate who possesses particularly strong technical skills, either in your field or in another field of interest to you. Ask this associate to lunch or on break and discuss a difficult problem you are trying to resolve.
- Observe people who consistently arrive at work and meetings on time. Ask them to discuss with you their ideas about how they are able to accomplish this.
- Watch a person who is most similar to you in style and approach. Observe his/her behaviors regarding their work habits as clues to how you may be perceived by others.
- Volunteer to serve on a cross-functional team outside of your area of technical comfort in order to learn new skills that could enhance what you already know, increase your confidence, and contribute more to your organization.
- Discuss with your manager or other people ways in which you could improve your technical skills and polish your work habits.
- Identify an individual in your organization whose organizational skills you admire and ask him or her to share techniques.
- Ask a respected associate if you can shadow him or her for a day to learn different techniques.
Specific Training Activities

- Enroll in further formal education to earn a higher degree in your skill area.
- Investigate coursework offered by your professional association to either enhance your skills and/or earn a professional certification.
- Participate in a workshop designed to build and enhance skills that lead to greater expertise.
- Seek an assignment to work with a group or task force that includes people from diverse interest groups or departments within your organization.
Initiative

Assessing and initiating things independently. The power or opportunity to act or take charge before others do. Possessing the confidence to do something proactive, needed, important, or urgent without prompting from others.

Although we may not know it, all of us possess the ability to think and act and solve problems on our own. In our jobs, we face issues all the time that require resolution. It is good and necessary that we do what we are asked to do and what is expected. What separates most successful people from the rest, though, is their ability to do what needs to be done before anyone else recognizes it needs to be done.

“Folks who never do any more than they get paid for, never get paid for any more than they do.”

Elbert Hubbard

Key Elements of Initiative:

• Situational awareness of what is going on around him or her and responds proactively and appropriately.
• Motivated to seek opportunities for continuous improvement.
• Accountable; takes ownership of assignments and follows up to ensure expedient, high-quality results.
• Offers to help others in the best interests of the district.
• Volunteers and supports new ideas and processes; adjusts well to change.
Behavioral Evidence of Initiative:

- Always seeks new tasks without waiting to be told.
- Is a self-starter and begins tasks immediately, requiring little direct supervision.
- Takes responsibility and accountability for completing tasks according to directions and specifications.
- Continually looks for improvements to processes and shares these ideas with management.
- Asks appropriate questions before proceeding with a new task.
- Supports new ideas and processes, and offers ways to ensure that they succeed.
- Takes ownership in his or her own personal and professional development.
- Grasps opportunities to improve knowledge and skills as they present themselves. Takes the initiative to learn higher-level skills that enhance the ability to contribute to the organization.
- Is situationally aware of what is going on around him or her, and adjusts priorities to address more urgent needs without waiting to be instructed to do so.
- Does not need to be asked to assist others in times of need, but rather jumps in and volunteers to assist others.
- Adapts well to new situations, unusual demands, emergencies, or critical incidents.
- Consistently turns in work early.

Measuring Initiative Performance

Consider the key elements and behavioral evidence of Initiative when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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Initiative Skill Enhancers

- Take responsibility for a task that no one really wants to do.
- When a particular assignment or task is completed, make an appointment with your supervisor to seek feedback and request a new project or task.
- On a task that you routinely complete, time yourself on each step of the task. Then establish a new timeline that reduces each step’s duration.
- If asked to complete a new assignment about which you are unsure of your skills, identify ways to improve them and recommend their completion to your supervisor.
- Assess how you appear to others. If you exude a careless appearance, choose two or three ways to sharpen yourself to reflect a more professional approach.
- Make it a point to arrive at work and to meetings on time.

Professional Growth Activities

- Identify an associate who always appears to be on top of things and who seems especially productive and happy. Discuss with him or her how you could learn more about this approach and attitude.
- Observe people who volunteer new ideas and approaches. Ask them about their thought processes that result in suggestions for improvement.
- Watch a person who is most similar to you in style and approach. Observe his or her behaviors as clues to how you may be perceived in terms of initiative.
- Make a list of people who you believe show consistent evidence of initiative and those who you believe are lacking initiative. Analyze the characteristics of the people in both categories and identify behaviors that demonstrate initiative that you can emulate.
- Discuss with our manager ways in which you could show greater initiative.
- Volunteer to serve on a cross-functional team that is out of your comfort zone of knowledge and will help you to increase your contribution to the organization.
- If coworkers are having problems with each other, try to help foster feelings of mutual respect. Never participate in idle gossip.
Specific Training Activities

- If you would like to take more initiative but are shy or intimidated to speak up in a group setting, take a course like Toastmasters to improve your self-confidence.
- Participate in a workshop designed to build and enhance skills that lead to greater initiative.
- Seek an assignment to work with a group or task force that includes people from diverse interest groups or departments within your organization.
Communications

Understanding all modes of communications, including written, verbal, non-verbal, and listening skills. Effective use in individual and group situations, and the ability to adjust the message to meet audience needs.

The very best employees exhibit the ability to present themselves and their ideas by successfully transmitting to others. They do this through what they write, say or don’t say, and how well they listen.

Effective communication helps one develop credibility and trust, express and inspire enthusiasm, solve problems, manage conflict, implement change, and develop others.

It’s said that everything in life has at its core effective communication—or the lack of it. This is most certainly true of great employees.

Key Elements of Communications Skills

- Demonstrates effective verbal, non-verbal, written, and listening skills and uses these to resolve issues objectively and effectively.
- Gathers and disseminates information in a timely manner to the appropriate audience using the most effective media.
- Accepts and provides constructive feedback and responds positively.
- Presents ideas in a clear, concise, organized, and persuasive manner.
Behavioral Evidence of Communications Skills

- Understands the audience and customizes communications to meet their needs.
- Watches attentively for the reactions of others in discussions.
- Maintains good eye contact throughout the presentation or discussion.
- Varies speed, volume, tone, and pitch to keep the listener’s attention.
- Breaks down explanations of complex processes, rules, or situations into manageable bites of information.
- Uses appropriate non-verbal communications such as gestures, facial expressions, and mannerisms to make the point.
- If emotions or tensions rise during a conversation, effectively defuses the situation by remaining calm and sticking to the facts.
- Uses visual materials effectively.
- Provides opportunities for audience questions, listens carefully, responds, and checks for understanding.
- Listens intently when others speak to fully understand the points being made.
- Asks appropriate questions in order to understand fully what is being said.
- Does not interrupt others.
- Demonstrates appropriate use of written communications that are free of spelling, grammar, punctuation, and usage errors.
- Ensures that there are few distractions (extraneous noises, bright lights, interruptions) for the audience when making presentations.

Measuring Communications Performance

Consider the key elements and behavioral evidence of Communications when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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Communications Enhancers

- Before making a presentation, identify the listeners’ needs and list questions and potential objections that could arise.
- Before a formal presentation, make a general outline with a planned opening and closing that is natural for you. Practice!
- When you do not know the answer to a question or understand what the speaker is saying, ask for clarification.
- Questions can be open-ended, clarifying, closed and rhetorical. Practice using all types.
- Gestures can dramatize a point and make a presentation more interesting. Practice using gestures in front of a mirror to find the ones that work for you.
- Ask someone to video a presentation you give. Watch the video to identify areas of strength and areas that need work.
- If you’re in a discussion and emotions begin to rise, pause for a few seconds to collect yourself, then move to presenting the facts.
- Improve your vocabulary. Learn at least one new word every day and make a point of using it in conversation.
- Analogies can add interest as well as meaning to your message.
- Identify messages and the media used that really impressed you. This will help you choose the appropriate way to deliver your message.

Professional Growth Activities

- Identify a specific behavior you’d like to improve. Share this with a coworker who can observe this behavior, and ask for specific feedback on how to improve.
- If you are challenged with written communications (e.g., spelling, grammar, and/or punctuation), identify a coworker who is strong in this skill and ask if he or she will mentor you for an hour each week.
- Practice a presentation in front of a friend or coworker and ask for direct, honest feedback.

Specific Training Activities

- Attend a communications workshop; join Toastmasters International.
- Look for opportunities to serve on committees and interdepartmental projects.
- Purchase a style guide (e.g., *The Chicago Manual of Style*) to teach yourself the fine points of spelling, grammar, and usage.
Judgment

The act or process of forming an opinion or making a decision after careful thought. Involves data gathering; consideration of alternatives; the use of logical assumptions; and cognizance of the potential outcomes of the opinion or decision given organizational values, resulting in decisions that are objective and wise.

Employees make decisions and recommendations for action every day. Good judgment ensures that a chosen course of action has a high probability of success with minimal collateral damage.

According to Noel M. Tichy and Warren G. Bennis (from their book, Judgment) “A leader’s most important role in any organization is making good judgments—well-informed, wise decisions that produce the desired outcomes. When a leader shows consistently good judgment, little else matters. When he or she shows poor judgment, nothing else matters.”

Key Elements of Judgment

- Researches issues, makes a judgment call, and executes the decision in the required time frame.
- Effectively makes judgment calls during a crisis while maintaining self-control.
- Prepares technically to be equipped to demonstrate good judgment.
- Involves others and varying perspectives as appropriate in making judgment calls.
- Able to assemble the proper team to fit the organization’s need.
Behavioral Evidence of Judgment

- Senses and frames issues.
- Assembles the proper team for decision making and action.
- Decisive; willing to take informed risks and executes to resolve issues.
- Adjusts judgment calls as conditions change if needed.
- Has a track record of making good judgment calls over time, especially in crisis situations.
- Takes ownership and responsibility for all decisions; never passes the buck when judgments aren’t so good, and always shares credit when judgments are stellar.
- Understands the organization’s culture and factors that understanding into decisions.
- Willingly and often solicits the ideas of others.

Measuring Judgment Performance

Consider the key elements and behavioral evidence of Judgment when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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Judgment Skill Enhancers

- Keep a communications and correspondence list of people involved in or affected by a decision. Review the list periodically to make sure that you have “covered all the bases.”
- Whenever possible, make difficult decisions when energy level and mental sharpness are high.
- Debrief all decisions, both good and not so good, to understand what went right and what went wrong.
- Review several of your decisions with your supervisor or a respected associate, and ask them what they thought of the process you followed and its outcome.
• Some of the most important judgments are about people, particularly about the individuals you choose to have on your team.

• After a crisis you had to manage is over, meet with your supervisor or a teammate involved in resolving the crisis, and ask them for feedback about how you performed.

• Think of judgment as a process, not a moment in time. Think of decisions you’ve made that didn’t go so well and record the process you followed (or didn’t follow) in coming to those decisions.

Professional Growth Activities

• Read Judgment by Noel M. Tichy and Warren G. Bennis.

• Identify effective decision makers in your organization and bounce ideas off of them prior to finalizing a decision.

• Ask others for examples of poor judgment on your part, and discuss ways to prevent recurrences.

• Ask others to explain their decision-making processes and judgment calls on a particularly complex or high-impact decision.

• Seek out low-risk decision-making situations (e.g., member of a project team) that will involve you with decision-making experts.

• Identify volunteer community organizations where you can serve in a decision-making capacity.

• Ask your supervisor for an assignment where you can serve in a decision-making capacity, such as selecting new equipment, staffing changes, or planning a department celebration. Discuss your decision-making process and rationale prior to implementation to receive feedback for improvement.
Customer Service

Proactively develop customer relationships by making efforts to listen to and understand both internal and external customers. Anticipate and provide solutions to their needs. Give high priority to customer satisfaction.

Individuals, departments, and operating units within our organization deal with each other as internal customers and suppliers. An organization is only as competent, knowledgeable, responsive, and reliable as the people they interact with most frequently.

Members of successful organizations see their internal and external customers as an investment and recognize customer service as a powerful tool for maintaining and increasing that investment.

Key Elements of Customer Service

- Responds to customers’ needs expeditiously.
- Demonstrates empathy, patience, professionalism, appropriate sense of urgency, and a positive demeanor.
- Asks questions to clarify issues or gather additional information to ensure proper course of action.
- Provides remedy to and closure of an issue to the customer’s understanding and/or satisfaction.
Behavioral Evidence of Customer Service

- Acknowledges customers and gives them complete attention
- Asks questions and analyzes information to determine needs, problems, and requests.
- Summarizes to check for understanding.
- Acts promptly; agrees on a clear course of action.
- Follows up with customers after handling their problems to ensure satisfaction.
- Thanks the customer.

Measuring Customer Service Performance

Consider the key elements and behavioral evidence of Customer Service when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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*For the first year in a job assignment, performance at this level should be designated as Developing.*

Customer Service Skill Enhancers

- Identify your customer base and schedule time with them to understand their needs and how you can fulfill them.
- Call a customer to ask about requirements, processes, or needs you might not be meeting.
- Correspond with customers, thanking them for bringing issues to your attention.
- Take advantage of opportunities to exceed customer expectations.
- Note how you are treated in situations when you are the recipient of customer service. Pay particular attention to behavior that impresses you. Use these situations as examples for improving your own customer service.
- Work at developing rational arguments for your ideas rather than relying on emotional appeals.
- When providing service in tense situations when your customer may be upset, practice mentally stepping back and breathing deeply.
- Ask an associate to observe you in performing customer service activities and ask for frank feedback on how you did.
**Professional Growth Activities**

- Request customer feedback on the quality of your service.
- Ask customers what it would take to satisfy them in a particularly difficult situation.
- Invite customers to your work area. Ask for suggestions on ways to improve service.
- Ask your manager to clarify how you can “bend” policy and how far you can go in terms of cost, time, and materials to meet customer needs.
- Ask your manager or coworker to observe your customer interactions and provide specific feedback.
- Observe people who provide excellent service with both routine and difficult service situations and discuss their approaches with them.
- Visit customers’ work sites and learn what they do.

**Specific Training Activities**

- Participate in a workshop designed to build and enhance customer service skills.
- Seek opportunities or projects in which a high level of customer service is required.
Teamwork

Working effectively with team and work groups or those outside formal lines of authority to accomplish organizational goals; taking actions that respect the needs and contributions of others; contributing to and accepting consensus; subordinating own objectives to that of the team.

All of us are immersed in a challenging set of relationships—with managers, peers, direct reports, customers, suppliers, and project teams, to name a few—that require considerable skill to handle well. Because many work activities require the input and cooperation of other people, teamwork will facilitate the optimal use of resources, as well as ultimately success and ownership.

“All alone we can do so little. Together we can do so much.”

Helen Keller

Key Elements of Teamwork

- Shares ideas and processes within the workgroup to improve performance, productivity, and effectiveness.
- Works well with others, including own team, other teams, and administration.
- Gains trust from coworkers, customers, and subordinates.
- Aware of and proactively involves appropriate stakeholders in decision-making processes.
- Seeks out opportunities to provide help to others when needed.
Behavioral Evidence of Teamwork

- Cooperates rather than competes with team members.
- Respectful of others.
- Trustworthy in managing information under consideration by the team.
- Offers suggestions, options, and information to team members.
- Listens to and considers the ideas of team members.
- Supports group decisions even if not in total agreement.
- Helps team members improve skills, knowledge, and attitudes.
- Allows others to take credit for good ideas.
- Communicates changes or problems to other team members.
- Demonstrates tact in dealing with and/or reacting to team problems.
- Provides alternatives if the team has difficulty reaching consensus.
- Praises others’ efforts, ideas, and participation.
- Takes individual ownership and accountability for contributions necessary for the success of the entire team.

Measuring Teamwork Performance

Consider the key elements and behavioral evidence of Teamwork when evaluating an individual’s performance in this job dimension. The following rubrics will help in determining an individual’s most consistent performance:

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**Teamwork Skill Enhancers**

- Send thank-you notes or e-mails to others who help you and copy appropriate management.
- Offer to help someone at least once a week.
- Invite a quiet associate, within or outside of your department, to coffee or lunch.
- Take responsibility for a task that no one really likes to do.
- Identify a person you least like to work with; find an attribute or behavior of that person and sincerely compliment him or her on it.

**Professional Growth Activities**

- Identify an associate who is different from you in style and approach. Discuss with him or her how your strengths can complement each other.
- Ask your associates to tell you about themselves— their goals and aspirations.
- Watch a person who is most similar to you in style and approach. Observe his or her cooperative behaviors as clues to how you may be perceived.
- Observe people who collaborate with others effectively. Compare their behaviors with your own. Discuss their approaches with them and request feedback.
- Make a list of people with whom you cooperate and those with whom you have difficulty. Analyze the characteristics of the people in both categories and identify your sources of mis-cooperation. Discuss with your manager or other people ways in which you could collaborate better.
- In a non-critical situation, permit another person with whom you’ve had difficulties, with whom you have not worked before, or who is not particularly assertive to “win.”
- Play team sports; if possible, join a company or department team or league.

**Specific Training Activities**

- Participate in a workshop designed to build and enhance teamwork skills.
- Seek an assignment to work with a group or task force that includes people from diverse interest groups or departments within your organization.
Individual Professional Growth Plans

The third critical part of Step 1 (Establishing Goals for the Year)—the part that is the glue that ties everything together and helps ensure success—is the Individual Professional Growth Plan. These activities and perhaps formal training are important in assisting the employee to achieve the “what” of the job as well as in improving key behaviors or the “how” of the job.

Supervisors are responsible for developing their personnel. In meeting this responsibility, they provide coaching and assistance throughout the yearly performance evaluation cycle in order to

- Improve personal performance and ensure the development of employees.
- Help employees eliminate or reduce mistakes and identify personal style issues for improvement.
- Provide feedback to employees on both accomplishments and areas needing improvement.
- Identify and take necessary action to reduce institutional barriers which contribute to any gap between actual and potential performance.

Coaching includes all the instructions, praise, suggestions, and mutual discussions used in developing employee potential and are a direct response to the need to assist employees in developing their potential, including skills required for success.

Individual professional growth plans should focus on improving knowledge and skills that will increase the likelihood of success. Formal classroom training is important primarily in developing technical skills sets; these are most effective when skill practice is included.

Consider the employee’s agreed-upon objectives, as well as the behavioral Job Dimensions against which he or she will be measured. Discuss options such as special assignments that will develop the employee’s ability to enhance technical skills/work habits, initiative, communications, judgment, customer service, and teamwork, the six key Job Dimensions of this performance evaluation system.

Refer to the Skills Enhancers, Professional Growth Activities, and Specific Training Activities areas included in the previous Job Dimensions sections of this guide for ideas of growth activities that can improve and enhance the employee’s performance.
Step 2: Progress Meetings – Review Expectations and Adjust

Annual appraisals are much easier and much more relaxed if the supervisor and employee meet individually and regularly for one-on-one discussions throughout the year.

The BPS system requires only one scheduled mid-year review meeting—the Semi-Annual Progress Review meeting; however, the more often the supervisor and employee touch base concerning progress against objectives and performance in each of the Job Dimensions, the more likely he or she is to be successful. Meaningful, regular discussions about work, career, aims, progress, development, hopes and dreams, life, the universe, the TV, common interests, or whatever make appraisals so much easier, because people then know and trust one another, which reduces stress and uncertainty.

The Semi-Annual Progress Review meeting will take place in the October time frame. Either the supervisor or the employee can schedule the review meeting, since its objective is not one-way but rather open, two-way communication.

The purpose of the mid-year review meeting is to verify that established objectives remain appropriate, adjust any objectives if circumstances have changed, listen to the employee about any frustrations and concerns he or she has in achieving the objectives, and offer to help remove constraints to success. It is also the time to give the employee feedback on the “How” of the job—the Job Dimensions. It may be that frustrations or constraints the employee has are due largely to assistance he or she may need in Teamwork or Judgment, for example.

The Semi-Annual Progress Review meeting will help ensure that there are no surprises once it’s time to complete the annual performance appraisal in April of each year.
Step 3: Pulling It All Together – The Annual Performance Appraisal

Once the evaluation period cycle is complete, it is time to complete the annual performance appraisal. The same form (Non-bargaining Support Staff Performance Appraisal System form, found in Appendix A) used to record objectives at the beginning of the cycle is used to complete and record the annual performance appraisal.

In order to complete the annual appraisal, supervisors should use the following tools and processes:

- The Employee Self-Appraisal
- Associate Feedback
- Supervisor notes

The Employee Self-Appraisal

The employee being reviewed should have an opportunity to provide input into his or her own annual performance. This is accomplished by having the employee complete a self-appraisal, using the same Non-bargaining Support Staff Performance Appraisal System form (found in Appendix A of this guide).

Beside each of the established objectives, the employee will enter text which describes his or her assessment of what was accomplished—and perhaps was not. The employee should provide as much detail as possible when addressing each of the objectives.

For each Job Dimension, the employee will select a performance level based on the rubric definitions provided in each Job Dimension section of this guide. The employee should add overall comments to further explain performance. Once completed, the employee gives the self-appraisal to his or her supervisor.

Associate Feedback

Few supervisors have the ability to directly observe their employees’ performance on a day-to-day basis. This is when Associate Feedback can be invaluable in providing a balanced view of how employees perform in the Job Dimensions while working with associates. These can be peers, subordinates, superiors, and internal and external customers.
In order to encourage associates to take the time to provide feedback, the request should be as simple as possible. They should also be assured that the point of gaining this feedback is not to associate individual comments to individual associates but rather to identify patterns in the employee’s performance of Job Dimensions that can help the supervisor praise the employee as well as identify areas needing improvement.

The supervisor should ask the employee for the names of three associates from whom feedback will be solicited. The supervisor should add three additional associates based on knowledge of who the employee works with on a frequent basis. These six individuals would then be asked to provide feedback regarding the employee’s performance in the six Job Dimensions in as simple a format as possible. Appendix A of this guide provides a suggested format to use when seeking associate feedback.

**Supervisor Notes and Observations**

All during the annual performance appraisal cycle, the supervisor should keep notes on the employee’s performance. These can be e-mails and memos received from others about the employee, the supervisor’s own notes on specific accomplishments or issues as they occurred, and any notes taken as part of ongoing, informal discussions.

**Completing the Appraisal Form**

The supervisor, using the employee’s self-appraisal and the supervisor’s own observations, completes the objectives section of the form by specifically and quantifiably commenting on the results of each established objective. Then, using the employee’s self-appraisal, feedback from associates, and the supervisors own notes and observations, the supervisor evaluates performance in the Job Dimensions by selecting one of the following performance levels based on the defined rubrics:

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*For the first year in a job assignment, performance at this level should be designated as Developing.*
Depending on the performance level selected for each dimension, all or a portion of that dimension’s weight will be assigned. Once all dimensions are evaluated, the sum of the assigned weights will equal the overall performance rating.

**Administrative Requirements**

All annual employee performance appraisals will be completed by the end of April each year; “complete” includes delivery of the performance appraisal contents to the employee.

**Conducting the Performance Discussion**

The supervisor should schedule sufficient time to deliver the contents of the annual performance appraisal to the employee. In order to communicate to the employee the importance of the discussion, the supervisor should make arrangements for the meeting to be uninterrupted except in the event of an emergency.

It is recommended that the dialog be open as each section of the appraisal is completed. The employee should be given ample time to react and respond to the appraisal contents. Once completed, the employee has the opportunity to include any comments he or she feels is pertinent; then both the supervisor and the employee sign the appraisal and return the original to the BPS Human Resources Services department by the due date.

The supervisor may kick off the new annual cycle during the same meeting by establishing objectives and discussing the personal growth plan during the same meeting. Alternatively, the supervisor and employee may prefer to begin the new annual cycle at a separate meeting held shortly thereafter.
Training and Tools for Leaders:

Each district supervisor of Non-bargaining Support Staff will complete scheduled training on this performance evaluation and professional growth system. Each two-hour session will include an overview of the systems development and design, a review of the key system elements, and practice in using the online, interactive form.

Interested individuals should check ProGoe for course listings, dates, and times.
APPENDIX A

Forms and Processes:

This section of the guide contains the specific form to be used as part of the Non-bargaining Support Staff Performance Appraisal System, as well as a suggested process for gathering Associate Feedback.

The Non-bargaining Support Staff Performance Appraisal System form should be used for the following purposes:

- To record agreed-upon objectives at the beginning of the review cycle.
- To record the employee’s personal growth plan at the beginning of the review cycle.
- As the self-appraisal form completed by the employee at the end of the review cycle.
- To record the formal performance results at the end of the review cycle.

This form is interactive and is found online.
The Non-bargaining Support Staff Performance Appraisal System

Please access this interactive form on line.
Associate Feedback Process

The following is a suggested approach to collecting Associate Feedback at the end of the performance review cycle.

E-mail Requests

The simplest approach is to request Associate Feedback via e-mail. Responders can reply with their comments easily and quickly; this approach seems to ensure a good response.

The following is a suggested script for an Associate Feedback e-mail:

SUBJECT: Associate Feedback for __________________________

Dear ____________:

I’m collecting input from associates of my above employee as I complete (his/her) performance evaluation. If you are willing, would you provide a comment on the following job dimensions that would help me provide balanced, constructive feedback to (him/her)?

Your input should reflect anything you’ve observed about this employee while working with (him/her) in the past year in the areas of

- Technical Skills/Work Habits
- Initiative
- Communications
- Judgment
- Customer Orientation
- Teamwork

Your input will remain confidential—I will not attribute specific comments made to the individual making them. Thanks for whatever response you can provide. I hope to hear from you by __________________.
APPENDIX B
Glossary of Terms*

This appendix defines terms that are commonly used in the performance management process. Many of the terms are referenced in this guide; others have been included to enhance understanding of the process and the systems that support it.

Many of these terms have multiple meanings; this glossary attempts to restrict the definitions to the ones most indicative of a performance appraisal process.

**Analogy:** A comparison between two things, typically on the basis of their structure and for the purpose of explanation or clarification.

**Associate:** Anyone with whom one works; he or she could be a co-worker, peer, subordinate, superior, and/or customer.

**Associate feedback:** Observations from an associate about how an individual gets his or her job done, based on Job Dimensions identified for his or her position.

**Behavioral:** Involving, relating to, or emphasizing behavioral patterns; the way a person acts.

**Best practices:** A technique or methodology that through experience and research has proven to reliably lead to a desired outcome.

**Coaching:** A development process via which an individual is supported while achieving a specific personal or professional competence result or goal.

**Collaboration:** Working with others to achieve or do something, especially in an intellectual endeavor.

**Compliance:** The act or process of doing what you have been asked or ordered to do; the observance of federal law, state statute, and district policies and procedures.

**Constraints:** Something that limits or restricts someone or something; a control that limits or restricts one’s actions or behavior.
**Continuous improvement:** An ongoing effort to improve products, services, and/or processes.

**Customers – external:** Customers that usually include students, parents, and the community.

**Customers – internal:** A customer who is directly connected to an organization and is usually (but not necessarily) internal to the organization. Internal customers are usually stakeholders, employees, or shareholders

**Debrief:** To carefully review upon completion of an activity.

**Decisiveness:** Able to make choices quickly and confidently; determining what the result of something will be.

**Deliverable:** To produce the designed, promised, or expected results.

**Developing performance:** A process supported by tools and resources to assist employees develop their performance.

**Effective performance:** Demonstrates strong performance in most key elements and behavioral evidence of a job dimension.

**Empowerment:** The process of which enables individuals/groups to fully access personal or collective power, authority and influence, and to employ that strength when engaging with other people, institutions, or society.

**Ethical behavior:** Acting in ways consistent with what society, individuals, and organizations typically think are good values.

**Highly Effective performance:** Consistently exceeds expectations in the key elements and behavioral evidence of a job dimension.

**Individual professional growth plan:** When individual team members identify strengths and areas for development through self-evaluation and feedback.
**Job dimension:** Includes the key competencies, including personality traits, that are held to be essential to performance of a job in order to meet objectives; the “how” of getting a job done.

**Meeting management:** The skills and techniques used to conduct a meeting that are most likely to ensure accomplishment of the meeting’s objectives.

**Mentor:** Someone who teaches or gives help and advice to a less experienced and often younger person.

**Mission Statement:** A mission statement is a statement of the purpose of a company, organization, or person; its reason for existing that guides the actions of the organization and provides the framework within which its strategies are formulated.

**Needs Improvement performance:** Performs to minimum expectations in several of the key elements and behavioral evidence of a job dimension. For the first year in a job assignment, performance at this level should be designated as Developing.

**Non-bargaining Support Staff Performance Appraisal Form:** The online, interactive form that is used to complete the annual and mid-year evaluations, as well as for completion of the self-appraisal process.

**Non-verbal communications:** Communication through sending and receiving wordless (mostly visual) cues between people.

**Operational values:** Core values are what support the vision, shape the culture, and reflect what the organization values; they are the essence of its identity – the principles, beliefs, or philosophy of values.

**Organizational beliefs:** Assumptions and convictions that are held to be true, by an individual or a group, regarding concepts, events, people, and things.

**Performance appraisal cycle:** The process through time which assesses, documents, and provides feedback on the performance of an individual.

**Performance evaluation/appraisal:** The documented results of completing the performance appraisal cycle.
Performance management: An ongoing process of communication between a supervisor and an employee that occurs throughout the year, in support of accomplishing the strategic objectives of the organization.

Progress meeting: Periodic meetings of the performance appraisal cycle during which the supervisor and employee discuss progress and adjust objectives as needed.

Qualitative feedback: Qualitative feedback is a body of observations and responses to one's work or performance that is based on comparisons and descriptions of characteristics in a non-numerical manner; allows those giving the feedback to be more specific about what they do or do not like and what they believe could be improved.

Quantitative feedback: Quantitative feedback is an evaluation performed on the basis of measurable outcomes and metrics, providing concrete information about employee and performance which can be used as part of a regular assessment plan or in the development of new goals.

Clarifying Questions: Simple questions of fact that clarify a situation.

Questions – closed-ended: A question that can be answered with either a single word or a short phrase.

Questions – open-ended: Deliberately seek longer answers and ask for thinking, reflection, opinion, and/or feelings.

Questions – rhetorical: Asked when the questioner himself knows the answer already or an answer is not actually demanded, therefore an answer is not expected.

Rubric: A guide or description defining specific criteria for assigning a level of performance to an employee.

Self-Appraisal: An employee's own judgment about the quality of his or her work, or the process of judging your own work.

SMART objectives: An acronym that defines criteria to guide the setting of objectives.

Strategic plan: A document used to communicate with the organization the organization’s goals, the actions needed to achieve those goals, and all of the other critical elements developed during the planning exercise.
**Student achievement**: Student achievement is a student doing well academically, obtaining life skills, and giving back to the community.

**Systems support**: Software and other systems that provide a needed infrastructure for a process.

**Tactical**: Of or relating to small-scale actions serving a larger purpose.

**Unsatisfactory performance**: Fails to meet the minimum performance requirements in most key elements and behavioral evidence of a job dimension.

**Vision**: An aspirational description of what an organization would like to achieve or accomplish in the mid-term or long-term future. It is intended to serve as a clear guide for choosing current and future courses of action. See also mission statement.

*Definitions are derived from various sources, including the Oxford Dictionary, the Merriam-Webster Dictionary, Wikipedia, the Business Dictionary, and from individual experience.*