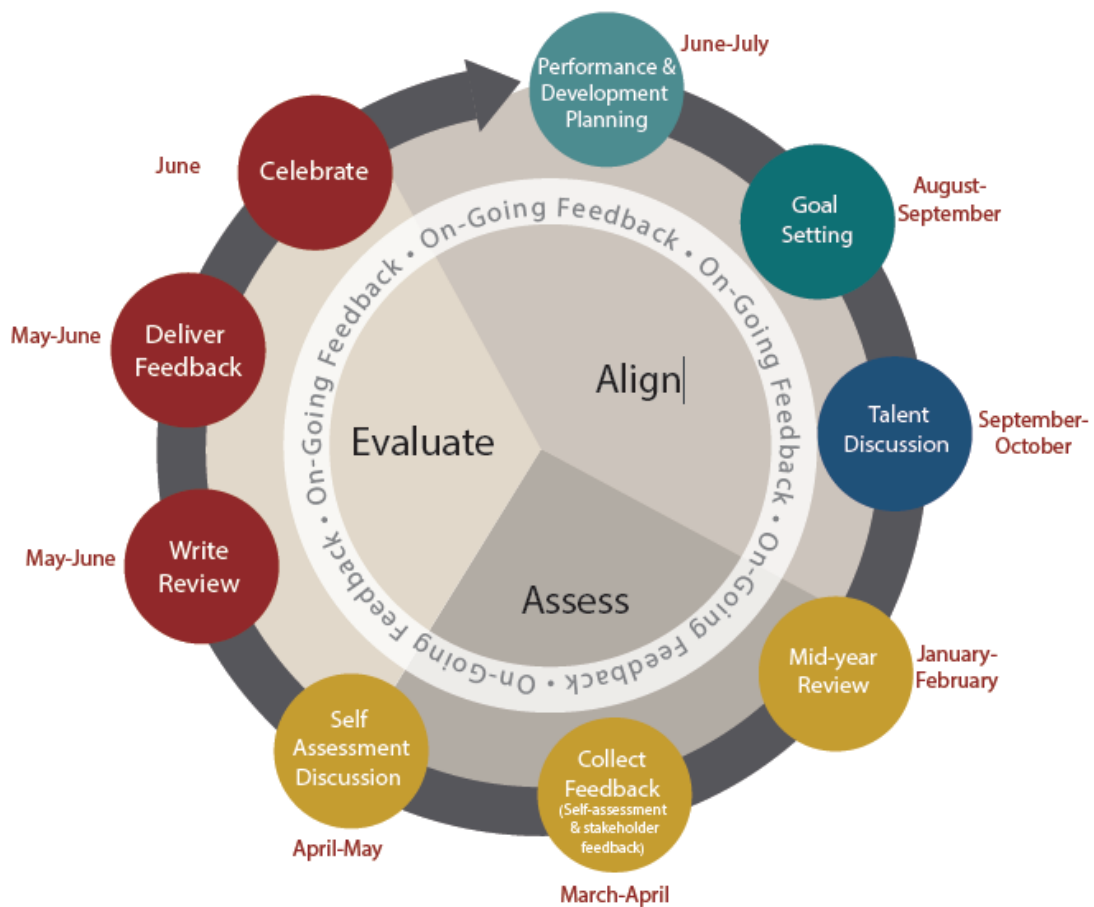


# FBISD Performance Management Playbook



# Table of Contents

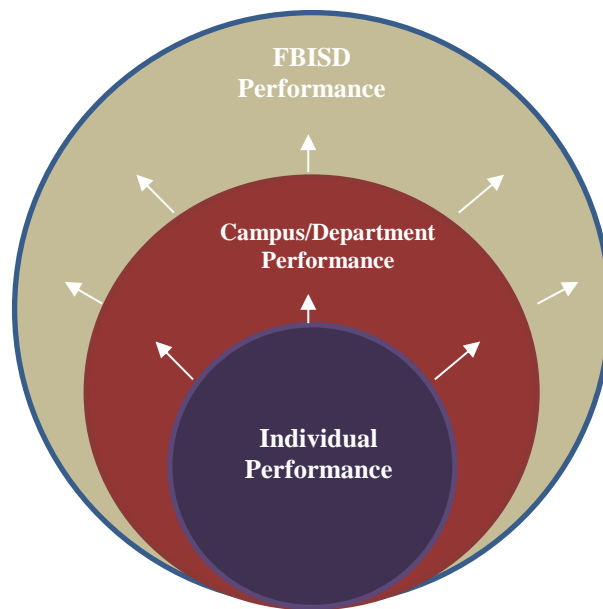
Table of Contents .....	2
Introduction .....	3
Layers of Performance .....	3
The FBISD Performance Cycle .....	4
Components of the FBISD Performance Cycle .....	4
Performance and Development Planning .....	4
Goal Setting .....	5
Characteristics of Effective Performance Goals.....	5
Writing Smart Goals .....	5
Non-SMART Goals vs. SMART Goals .....	5
Talent Discussion: Coaching and Feedback .....	6
Effective Coaching .....	6
Mid-Year Review .....	7
Collect Feedback .....	7
Self-Assessment Discussion .....	7
Write Review .....	8
Celebrate: Recognizing and Rewarding Performance .....	8
FBISD Leadership Competencies .....	9

## INTRODUCTION

The FBISD *Performance Management Guide* is designed to assist employees with understanding the performance management cycle and their role in it. By utilizing these guidelines consistently, employees will know their performance expectations and will have tools for improving their performance. Ongoing feedback combined with annual performance appraisals is an effective way to discuss performance issues objectively and specifically with employees. In addition, performance appraisals emphasizing coaching and employee development helps the employee reach their full potential.

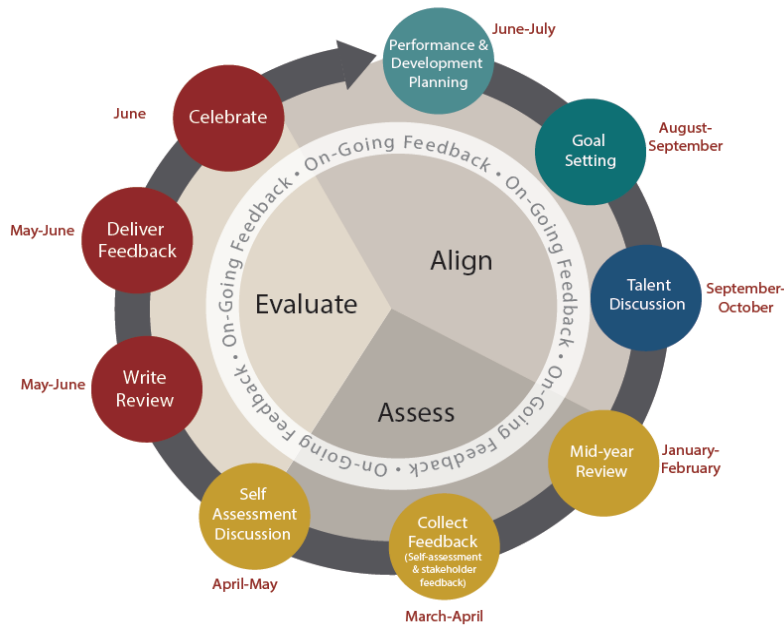
## LAYERS OF PERFORMANCE

Performance within any organization starts with each individual employee. The performance of an individual contributor ripples outward and directly impacts the performance of the team, department and organization as a whole.



A major goal of performance planning is for the supervisor and employee to explicitly identify the link between the employee's job responsibilities and performance and the objectives and mission of the department/campus and district. This alignment helps the supervisor and employee prioritize the employee's work and establish performance standards that will be monitored throughout the performance cycle.

## THE FBISD PERFORMANCE MANAGEMENT CYCLE



### COMPONENTS OF THE FBISD PERFORMANCE CYCLE

Throughout the FBISD Performance Cycle, employees and supervisors align, assess, and evaluate performance. In addition, ongoing feedback is provided to the employee throughout the year. The cycle consists of the following components which are defined in this manual:

<ul style="list-style-type: none"> <li>• Performance and Development Planning</li> <li>• Goal Setting</li> <li>• Talent Discussion: Coaching and Feedback</li> <li>• Mid-Year Review</li> <li>• Ongoing Feedback</li> </ul>	<ul style="list-style-type: none"> <li>• Collect Feedback (Self-Assessment and Stakeholder Feedback)</li> <li>• Self-Assessment Discussion</li> <li>• Write Review</li> <li>• Deliver Feedback</li> <li>• Celebrate</li> </ul>
---	--

#### PERFORMANCE AND DEVELOPMENT PLANNING (June-July)

Performance and Development planning is the first step in the performance management cycle. At the beginning of the appraisal period, the supervisor and employee review the job responsibilities, identify performance objectives and district/campus/departmental objectives, and FBISD competencies, decide upon projects and discuss standards of performance.

In addition to reviewing the previous year’s performance, the supervisor and employee spend time planning for the coming year. Performance planning includes a review of district and department/ team objectives to ensure that the employee’s individual performance aligns with the district’s objectives, FBISD competencies and needs. In addition, the employee and supervisor review principal responsibilities, determine projects and milestones to be achieved in the coming year and discuss standards of performance.

If an employee is new, performance planning should take place during their first month of employment.

## GOAL SETTING (August-September)

After both the supervisor and employee review the job responsibilities, establish performance standards and align the employee’s performance objectives to the mission and objectives of the district and department/campus, the next step is to establish specific, measurable performance goals. . During the Goal Setting step, the employee writes SMART goals that align with district’s goals, core beliefs and commitments, mission, vision, and/or core competencies and team objectives and address both their personal and professional development needs. These are then reviewed and approved by the supervisor.

### Characteristics of Effective Performance Goals

Effective performance goals ...

- Show clear alignment with the district’s mission, vision, core beliefs and commitments, and competencies while also aligning with departmental/campus goals and objectives
- May require the performer to “stretch”, but are definitely achievable
- Further the performer’s professional and/or personal development
- Are written in SMART format

### Writing SMART Goals

Writing performance goals helps the employee to think them through and take specific action on each goal. It makes the employee accountable with the supervisor’s support for achieving the goals to the best of their ability. SMART goals are **S**pecific, **M**easurable, **A**ction-oriented, **R**ealistic and **T**ime-bound:

- **Specific:** explicit, clear and concise
- **Measurable:** quantifiable (quantity, quality, time or cost)
- **Action-Oriented:** indicate desired outcome/ results
- **Realistic:** challenging, yet attainable
- **Time-Bound:** include milestones/ checkpoints and target completion date

### Non-SMART Goals vs. SMART Goals

SMART goals place an emphasis on the result rather than the task. This makes it easier to demonstrate effective performance and makes the performance objective clear to both you and your supervisor. Below is a comparison of non-SMART goals and SMART goals. The key distinction is in the explicit description of milestones and measurements tied to each goal.

Non-SMART Goal	SMART Goal
Maintain department website	Ensure accuracy of the department website by conducting a comprehensive audit of the department’s website every two weeks. Work with supervisors, staff and faculty in the department to edit information provided on the website. Make requested edits within two workdays.
Students will write regularly in class.	Students in my grade 6 English classes will either write or add on to a previously started written piece from the following list: an informal letter, a response to a literary or expository text, a persuasive text, essay describing a personal experience or write a poem.
Self-assess regularly	Once a week during the 2015-16 school year I will add to my portfolio the week’s responsibilities, projects, and expectations, my performance and progress of each along with the results.
Complete Mid-year review	During the 2015 -16 school year I will meet with all my employees during January and the first two weeks in February and complete the mid-year review by February 20 <sup>th</sup> .

## **TALENT DISCUSSIONS: COACHING AND FEEDBACK (September-October)**

Throughout the performance year, the supervisor provides ongoing feedback on performance and the employee proactively solicits feedback to ensure performance and expectations are aligned. Both the employee and supervisor provide objective information to identify areas of strength and areas for improvement throughout the year. Effective coaching and feedback stems from open, ongoing communication between the supervisor and employee based on honesty, objectivity and continuous improvement.

Throughout the appraisal period, both the supervisor and employee monitor the employee's progress. Each has information regarding the performance to date. The coaching process provides a forum for the mutual exchange of this information. A supervisor's role is similar to that of a coach in sports. An effective coach motivates, provides feedback, offers encouragement toward the achievement of goals and helps players to focus on the game plan.

Coaching involves two key leadership activities:

- Providing constructive feedback to change or improve performance
- Recognizing and encouraging excellence

Employees require frequent and ongoing feedback in order to improve, develop, and take on additional responsibility. In addition, when they are performing well, the individual's efforts should be acknowledged and supported. Coaching may be either formal or informal. Formal coaching involves setting aside time to meet privately, free from interruptions. Informal coaching is usually provided on a day-to-day basis as situations arise.

### **Effective Coaching**

Successful coaching takes place when the supervisor and employee:

- Are prepared and informed
- Cite specific examples
- Focus on behavior, not personality
- Actively **LISTEN** to each other
- Ask clarifying questions
- Reach agreement
- Develop an action plan
- Follow up

While self-development tends to be the most beneficial and effective, even superior performers experience growth with coaching feedback. Employees are encouraged to seek out opportunities for discussion of their performance, including regular feedback and coaching from their supervisors. Development is a shared responsibility best initiated by the employee and supported by the supervisor. Supervisors can use their experience, knowledge and skills to help track employee performance and provide the necessary support and opportunities for development.

### **MID-YEAR REVIEW (January-February)**

Throughout the performance management cycle, the supervisor and employee monitor the employee's overall performance related to the documented job responsibilities and performance expectations and use the action plan to monitor their progress toward achieving the defined performance goals. In addition to ongoing feedback, it is important for the supervisor and employee to complete a mid-year review of progress toward completion of goals. This mid-year progress review is important as it provides an opportunity for the supervisor and employee to determine progress to date and next steps. If performance expectations change throughout the year, the supervisor and employee will redefine expectations and update the goals and action plan to reflect that change.

### **COLLECT FEEDBACK (March-April)**

Collecting feedback is an ongoing effort throughout the review period and a responsibility of both the supervisor and employee. It is through effective and consistent two-way communication that performance management links the activities of planning and appraisal.

Communication between the supervisor and employee during the performance appraisal period must be open, honest and ongoing. Employees can and should initiate the communication, particularly when any significant changes or obstacles occur that management should be aware of. Often, responsibilities, projects, objectives and performance plans need to be modified as a result of changing circumstances and shifting priorities. Supervisors and employees are expected to keep each other apprised and current.

Throughout the appraisal period, the supervisor monitors performance by reviewing and documenting work activities, milestones, obstacles and results. Consistent and accurate documentation during the appraisal period facilitates regular feedback and annual performance appraisals.

Monitoring performance and collecting feedback can be accomplished through formal and informal approaches. Some formal methods might include:

- Periodic written feedback
- Supervisor-employee face-to-face meetings
- Group or team meetings

Formal conversations are not the only option for monitoring performance. Some situations might make informal conversations such as private hallway chats appropriate for addressing very current work tasks and performance.

### **SELF-ASSESSMENT DISCUSSION (April-May)**

Since employees are aware of their own responsibilities, projects, objectives and skills, they are expected to monitor their own performance. Each employee is best able to measure their own performance against expectations and is encouraged to periodically keep their supervisor informed of progress and/or problems. Employees should keep track of their performance by documenting major activities and results whenever possible. One such method of tracking might include the development of a performance portfolio to collect the data to support completion of goals.

When employees have trouble making progress toward the achievement of objectives or responsibilities, they are responsible for taking suitable action to remedy the situation and close performance gaps. They may take action on their own or they may need assistance from their supervisor.

## **WRITE REVIEW (May-June)**

### **Performance Appraisal and Discussion**

At the end of the performance year, the supervisor and employee complete the annual performance appraisal conference and written documentation related to their performance and progress toward the identified goals. The supervisor then completes the appraisal form related to the same objectives. Each assessment should be supported by specific results and objective examples of performance throughout the year. The supervisor and employee meet to discuss the employee's performance, identifying key areas of strength and accomplishment and areas for improvement.

### **CELEBRATE: Recognizing and Rewarding Performance (Ongoing – Culminating in June)**

Recognizing and rewarding performance should occur frequently throughout the year. This can include simple verbal recognition. Other forms of acknowledgement of good work include professional development and opportunities to work on challenging and interesting projects. These opportunities provide high performing employees with the ability to grow and develop professionally.



## **FBISD Competencies**

During the performance planning stage, the supervisor and employee should also discuss the District's 7 Competencies. These Competencies apply to all District employees and are as follows:

- **Honest** - *Instills and fosters mutual trust and confidence; creates a culture that cultivates high standards of ethics; behaves in a fair and ethical manner toward others, and demonstrates a sense of responsibility and commitment, while maintaining job related, social, organizational and ethical norms. Demonstrates integrity in all situations.*
- **Problem Solver** - *Identifies problems, involves others in seeking solutions; conducts appropriate use of data and analyses; searches for best solutions; responds quickly and thoughtfully to new challenges.*
- **Communicator** - *Communicates effectively both orally and in writing; respectfully, actively, and attentively listens to others to gain full understanding of issues; courageously and appropriately engages in fierce conversations; appropriately adapts communication style to the audience using high impact delivery mechanisms and open dialogue.*
- **Collaborator** - *Works effectively with others to achieve group goals and objectives that are aligned with the mission and vision of Fort Bend ISD; takes actions that respect the needs and contributions of others and yields one's own objectives to the goals of the team. Facilitates and contributes to teamwork.*
- **Competent** - *Executes responsibilities effectively and with fidelity; possesses the knowledge, skills, mindsets, and thought patterns that result in the execution of effective and successful performance; produces quality results with efficiency and efficacy.*
- **Innovator** - *Develops new insights into situations; challenges conventional approaches; encourages others to generate new ideas and innovations; designs and implements visionary, scalable systems. Transformational leader who sustains positive change.*
- **Inspire Others** - *Empowers and transforms others; nurtures talent and develops capacity; demonstrates servant leadership behaviors that promote connectedness and interpersonal relationships.*

These competencies provide employees with the “how” of their job performance and are closely tied to the District's mission, vision, core beliefs and commitments.