**Professional Growth Plan Handbook**

**Network Support**

**Spring 2014**

[](http://achievementfirst.smugmug.com/School/Achievement-First-Apollo/14496810_tGmvH#1077404385_y5e4z)****[](http://achievementfirst.smugmug.com/School/AF-Bushwick-Middle/9513164_mkP8V#1085791739_Sxwwb) ****

*“I feel my PGP this year was a very effective tool in my self-evaluation process. Specifically,*

*I feel the feedback I received from my principal and supervisor was highly useful to me as I*

*examined by own effectiveness as a teacher at my school.” – Achievement First Teacher 2010*

Welcome!

Our Professional Growth Plan (PGP) process is an opportunity to step back mid-year and holistically consider one’s strengths and growth areas, to get targeted feedback, and to set goals for the remainder of the school year. We’ve learned that feedback drives performance more than any other learning and development tool. Therefore, by investing in the PGP process you are investing in our most important resource – our talented team members.

The purpose of this Handbook is to support Network Support Managers in leading the PGP process. In addition to finding links to key documents and a timeline of this year’s process, this Handbook includes information on the purpose of PGPs, the areas of evaluation, and information on where PGPs fit into Achievement First’s larger talent cycle. Lastly, this Handbook includes practical advice on providing feedback through writing and in face-to-face conversations.

Thank you for the important leadership role you play in developing your team!

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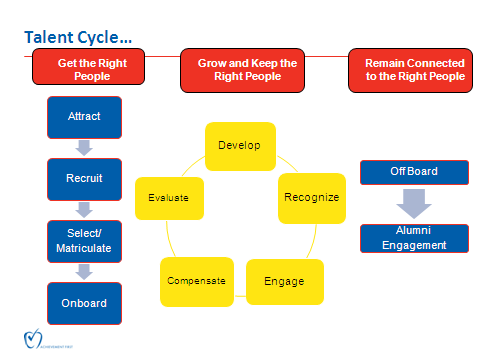
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# **Purpose of Professional Growth Plans in the AF Talent Cycle**

***  
Talent Cycle***To reach our ambitious goals, Achievement First must identify capable team members, develop and retain talent, and maintain relationships with successful staff who leave the organization for a variety of factors. The image below illustrates the elements of this talent cycle, which seeks to get, grow, keep, and remain connected to the right people.

Purpose of Professional Growth Plans (PGPs)

Professional Growth Plans are critical to growing and keeping the right people. Through the PGP process individual team members are invited to identify strengths and areas for development through self-evaluation and feedback. This process highlights the key competencies associated with various roles. Once team members have discussed where they are in relationship to the PGP competencies, they commit to action steps that will increase effectiveness. This process is an investment in the growth of your strongest individual team members. It is also a chance to identify team members who need additional support to succeed. To maximize the impact of this process, strategize with your manager and colleagues on how to use PGPs in order to provide consistent, on-going feedback and how to make sure you keep goals alive.

***What will your team members gain by participating in the Professional Growth Plan process?***

At Achievement First, *we believe that deep engagement in the Professional Growth Plan process will increase each team members effectiveness and their impact on the network*. By completing the PGP process, each team member will identify strengths, growth areas, and concrete, actionable goals with their manager. Through this process, each team member will gain a clearer sense of where they are and what they must do to continue to grow and develop. This process is an opportunity for team members to formally connect with their manager and step back from their day to day responsibilities. Taking the time to talk with team members about the success factors for their role and their individual growth trajectory is an investment in your team’s capacity to serve our network. In other words, it’s time well spent.

As a Network Support manager, you are both a participant and a facilitator of the Professional Growth Plan process. Completing your own Professional Growth Plan first – before leading your staff through their process – will give you a richer perspective. After meeting with your manager, reflect on the high points of your Professional Growth Plan process and consider how to create similar experiences for your staff.

# **PGP Quick Reference**

1. **Self-Evaluation:**
   1. Send copy of blank evaluation to team members and request they evaluate themselves prior to meeting.
2. **360 Feedback**
   1. Colleagues and team members who report to you provide feedback on your performance. All team members receive their 360 feedback report and should incorporate comments and ratings into their self-evaluation.
3. **Manager Evaluation:** 
   1. Review and organize key results, evidence, and notes. Review 360 feedback.
   2. After receiving the self-evaluation, complete the written PGP, including ratings and comments.
   3. Write the summary (far left column only). Identify the team member’s greatest strengths and areas for improvement. Consider the 20% of growth areas that will make 80% of the difference. Do not complete the next steps/goal setting part of the summary . This part will be completed collaboratively during the meeting.
   4. Email the team member your written evaluation 24-48 hours prior to the PGP conversation.
4. **Feedback Conversation:** 
   1. Meet with the team member within 2 weeks of receiving their PGP self-evaluation.
   2. Before the meeting, review your written review and the team member’s self review. Get in the team member’s head. What are they thinking? How are they approaching your time together? What do they want to be doing next year/five years from now?
   3. Go in with a tight plan/agenda of how you want to use your time together.
5. **Goal Setting:**
6. Go to the last page of the PGP and discuss the summary of strengths and weaknesses with your team member.
7. Discuss and write next steps to build on strengths and to leverage those strengths for the team and network. Discuss and write specific goals to be reached in areas of growth.
8. Agree on strategies and resources/support needed for addressing these focus areas and how/when progress will be measured.
9. **After the Meeting:**
   1. Save all the completed PGPs for your direct reports (with the goal setting page completed) and [submit them using Many Minds](https://manyminds.achievementfirst.org/sites/NetworkSupport/TeamCoS/NSPGP/_layouts/15/Upload.aspx?List=%7b72AFAE3A-E22A-4763-8174-0A81D0D60825%7d&RootFolder=) by **May 12,** **2014.**
   2. Keep the goals alive! Regularly check-in on team member’s progress toward goals!

# **2013-2014 Network Support PGP/360 Timeline**

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Date** | **Important To-Do’s** | **Helpful Resources** |
| **Effective Preparation** | September/October | * **Individual goal setting** with your manager (review progress toward goals; set new goals as appropriate) | * Goal Setting Sheet |
| Late Jan –Feb | * **Discuss the PGP process with each team member.** Check-in on each of the following items:   + **Goals** – Come to an agreement on which goals each team member will include in the first section of the PGP.   + **Feedback responders** – Discuss which people will complete the 360 feedback survey for each team member.   + **Key dates** – Set key dates, including when self-evaluations are due and when each PGP conversation will occur.  Make sure these dates are on your calendar. * **Attend PGP Training** for Network Support Manager on 2/26 (developing talent) and 3/26 (developing new talent) | * Network Support Memos will include information on PGPs and 360s. Make sure that you and your team members read the Network Support Memo for information and next steps related to PGPs and 360s. * PGP Handbook ***(for Network Support Managers)*** * PGP Training PowerPoint |
| February | * Submit 360 feedback providers through Echospan   + **2/7 – 2/14** – All Network Support Team Members submit their list of feedback providers through Echospan.   + **2/14 – 2/21** – Managers will receive one automatic email for each direct report. Please review the list of people and approve or edit it. |  |
| **Quality Implementation** | March | * February 28 – March 14 - Group 1 360 Feedback Survey | * 360 Survey Questions |
| April | * March 21 – April 4 - Group 2 360 Feedback Survey | * 2013-2014 Network Support Manager PGP * 2013-2014 Network Support Team Member PGP |
| * April 21 – Group 1 Conversations complete |  |
| May | * May 5 –Group 2 Conversations complete |  |
| * May 12 – PGPs (including goal setting sheet) are [submitted using Many Minds](https://manyminds.achievementfirst.org/sites/NetworkSupport/TeamCoS/NSPGP/_layouts/15/Upload.aspx?List=%7b72AFAE3A-E22A-4763-8174-0A81D0D60825%7d&RootFolder=) |

# **Evaluation Components**

***Professional Growth Plans***

As the graphic below demonstrates, Network Support Professional Growth Plans (PGPs) evaluate both the inputs (actions or behaviors) and the outcomes (results) related to each team member’s work. There are two Network Support Professional Growth Plans – one for managers and one for team members.

***360 Feedback Survey***

The questions on the 360 survey directly align to the focus areas and indicators outlined in the PGP. 360 feedback is gathered for each network support team member. Colleagues who work closely with each team member and direct reports are asked to complete a survey (approximately 30 questions for team members; 47 questions for managers).

***Best Practices for Incorporating 360 Feedback in PGPs***

Tracey Geller will send managers customized 360 feedback reports for each team member. **Review these reports, send them to your team members, and incorporate the feedback into your written PGP evaluation.** The sections and individual questions in the reports are directly aligned to the PGP.   As you write comments for each section of the PGP, review the corresponding section of the survey report and incorporate feedback in your ratings and comments.

**Share the feedback through your ratings and by cutting and pasting quotes into your comments.**  Here is an example of how one might incorporate a direct quote into a PGP comment:

*Communication:  I have (and everyone who has worked with you has) been impressed with the quality of your communications.  One colleague noted that you are “a powerful communicator, particularly in small groups.”  In order to improve your effectiveness, a colleague suggested this helpful advice, “sometimes the information is too much, and I would benefit more from less information that was tailored to my needs”.  I think this is an accurate assessment.  While your decks are incredibly clear, it is essential to determine what information is most needed and target it to the specific audience.  I’d like you to push yourself to think from the perspective of a given audience to identify the most critical information, the most easily digestible format and the communication style that is most familiar to the audience. I think the skills you have currently, combined with a knowledge of this philosophy will lead to increasingly effective presentations.*

# **Before You Write**

Professional growth plans are an opportunity for self-reflection, performance review and goal setting. Thoughtful written feedback is the first step in the PGP cycle and provides team members with clear evidence of their strengths and areas for growth.

**What have you learned are best practices for providing written feedback?**

**Before You Write:**    
  
**1. Gather information over time**

Feedback should not be based on one observation from one person, but rather from multiple interactions and observations from more than one person. Review the PGP form to identify key areas for evaluation. Then, gather input from the pre-identified resources.

**2. Sketch out the big takeaways** **and consider the impact**

1. What are the 2-3 core messages you want to get across to make sure the person remembers? Be sure to prioritize the highest impact issues within the Executive Summary.
2. How does this person’s performance this year compare with his or her

performance last year/quarter?

1. How does this person compare to others doing the same job?
2. What actions did you discuss last time? How effective have they been?
3. Look at their self review. Are there significant differences in your opinion and their opinion? Are their self reviews unduly harsh or lenient?
4. Is anything going to be a surprise? Hopefully no! Ideally, your written review should largely reflect the feedback given throughout the year. That said, don’t hesitate to deliver a surprise in the written evaluation if that needs to happen – just take that as a reminder to be more direct in your conversations going forward so that next time there are no surprises.

**3. Discuss big takeaways with your team leader**Meet with your team leader to quickly discuss the big strengths and weaknesses of each member of your team. This will help with calibration across the network and ensure you are focusing on the most important areas.

# **2Best Practices For Written Feedback**

1. **Be Specific and Use Evidence** (observable behavior, facts and data, examples of past behavior) to illustrate your points and to help team members internalize their behaviors. *Language: “In the past few days there were four specific examples that made me question whether tasks were being prioritized appropriately. These include: cleaning up the listserves, removing Fred from a listserve, responding to Wilma’s question about email forwarding, and Barney’s blackberry.”*
2. **Describe behaviors; avoid labeling.** Rather than saying “you are defensive”, say “When you cut people off in meetings, it comes across as defensive.”
3. **Describe the positive or negative impact.** Why must these behaviors stop or why are they so valuable? Explain criticism in terms of a shared greater good rather than as a personal indictment. *Language: “…when you are visibly frustrated in a meeting it makes others less comfortable to share around you and thereby undermines your credibility as a team leader.”*
4. **Communicate progress against goals.** Team members should have a clear sense of whether or not they are meeting expectations with regard to their goals. Commentary can range from speed and efficiency in reaching goals, quality of the achievement, ability to draw on outside resources, and/or comparison to past goal achievement.
5. **Focus on both the “what” and the “how”.**
   1. What have they achieved?
   2. How have they done it? What are the character strengths that they’re exemplifying or not exemplifying? Are they aligned to AF values/culture?
6. **Provide goals/action steps**. Present a nuts and bolts repertoire of approaches that the staff member can draw on. By giving flexible options you make it clear the choice is not whether the issue will be resolved but rather how it will be resolved.
7. **Make sure your writing is clear and to the point.** If this were given to you, would you understand exactly where you’re exceeding expectations and where you’re falling short? Top performers should understand that they’re doing a really good job. Low performers should understand that they are not. You may want to include a summary sentence at the end of the review:

*Language (low performers): “As stated above, it is critical that XYZ happen…. {going forward}…or {by DATE.}” Next line if necessary: “If we don’t see this by DATE, we are going to have to consider additional next steps and possible consequences, including possible non-renewal.”*

*Language (high performers): “In sum, you are doing a phenomenal job, specifically as it relates to the rigor of your instruction. I look forward to seeing you continuing to grow and take on more responsibility in the organization.”*

1. **Speak the truth!!!** When you’ve finished your first draft, ask yourself: have I spoken the truth? Have I short-changed positive feedback? Have I soft-pedaled any criticism? Have I been honest and direct?

**When Highlighting Strengths:**

1. **Showcase areas of achievement.** Too often when receiving feedback, people focus on their areas for improvement and make light of their strengths. Make sure that strengths gain attention and become a list of actions to continue.
2. **Compliments bear repeating.** Regardless of whether or not a success has been celebrated in the past, it is always worth reminding people of the impact and importance of their contributions.
3. **Sometimes areas of growth are strengths.** If major progress has been made in improving an area of weakness, feel free to celebrate it, even if that area may still be an ongoing concern. Sincere efforts and progress should be applauded.

**When Writing About Areas for Growth:**

1. **Identify CLEAR areas for growth and improvement.** Regardless of overall performance, every person has areas of growth. Be specific about growth areas and provide evidence to support the feedback. Objective evidence helps the person receiving feedback to better understand and change the behavior.
2. **Offer suggestions for improvement.** Once an area for growth is identified, offer potential hypotheses and solutions for applying corrective action. Suggestions—not decisions—should be a springboard for constructive dialogue and discovering the root causes. The team leader should always act as a key resource in addressing such situations. For example, you might have a staff member who has missed several deadlines. After reviewing the history that led up to these events, you might jointly conclude that the issue is one of poor organization systems (such as systems for creating action plans). You would then brainstorm possible solutions.
3. **Get it all out there.** Many of us find it hard to communicate negative feedback, fearing the ramifications of making explicit criticisms. When we do not put all of our cards on the table, we hamper that team member in their efforts to succeed. That said, nothing in the PGP process should be a surprise, and the overall process should not just be a laundry list of concerns. **Let’s Practice!**



**1. The team member is frequently missing key deadlines.**

Evidence (“When you do/do not…” or “When I see…”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Impact (“…this is what happens….”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Steps (“Beginning next week….”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**2. YOUR CHOICE:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
  
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Evidence (“When you do/do not…” or “When I see…”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Impact (“…this is what happens….”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Next Steps (“Beginning next week….”): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

# **Sample 360 Report Email to Team Members**

# **Prepare Your Team Members for Feedback**

***Draft Email: Team Leaders Sending feedback reports to Direct Reports***

Hi {Team Member’s Name}

As you know, AF Network Support team members have the opportunity to receive feedback from the AF network during the 360 Feedback Survey process .  In reviewing the feedback shared in the attached report, I was particularly struck by this quote: “insert quote.”  This comment really gets at the heart of your strengths.  We are thrilled to have you as part of our AF Team and Family!

Through your Professional Growth Plan (PGP) process, you have the opportunity to reflect on this feedback, celebrate your many strengths and identify a few areas for continued growth.  As you prepare to write your PGP self-evaluation, please review the feedback in the attached report so you can incorporate it into your self-evaluation.  During our next check-in, we’ll take a moment to talk about incorporating this feedback.

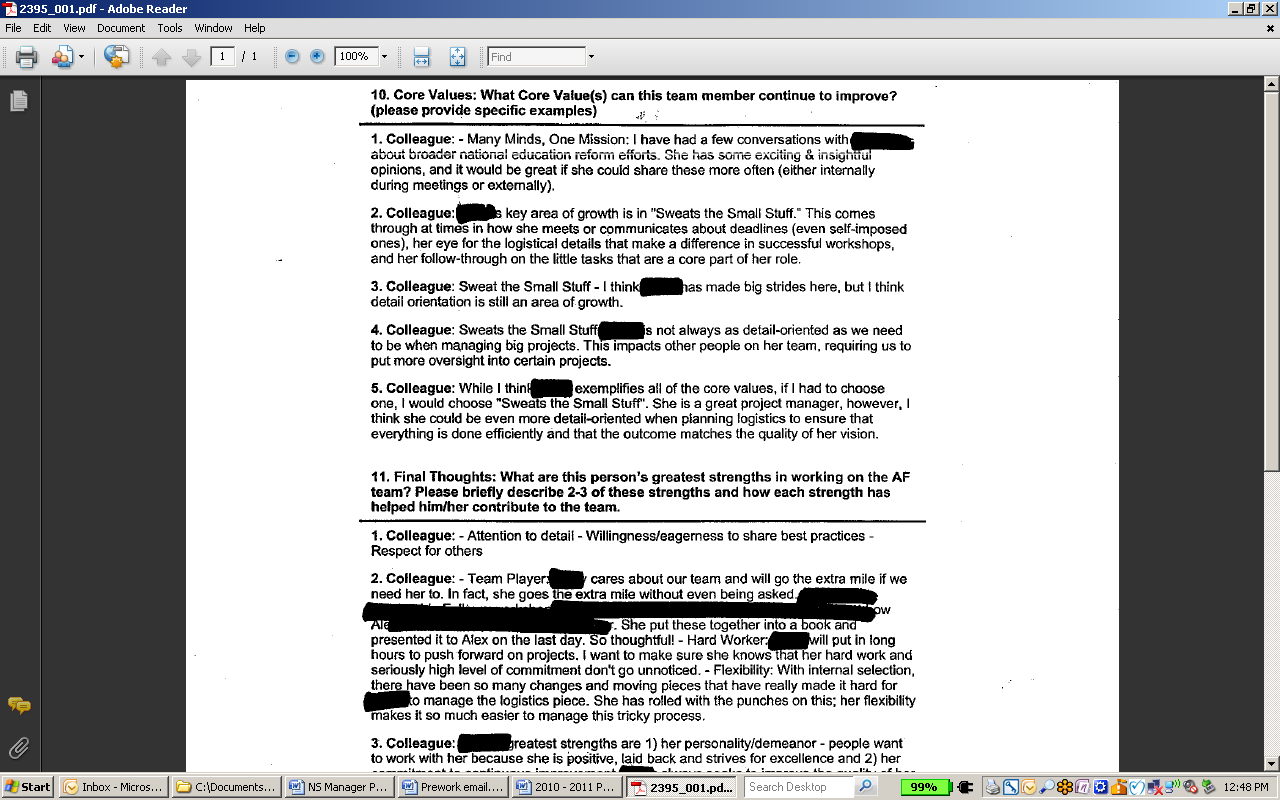
I look forward to spending time with you during your process.  During our PGP conversation, we’ll spend time recognizing your good work since the beginning of the year and helping you to set goals that will ensure your continued growth.

Best,

{Team leader name}**Practice Activity: Incorporating 360 Comments into Written Feedback**

As you read on page 6, the best way to share themes expressed in the 360 feedback surveys is to weave comments into your written PGP feedback. Follow the steps below to practice incorporating feedback in this manner.

* **Step 1: Read the following sample passage from a 360 feedback report.**
  + What themes strike you as growth areas for this person?

**

* Step two: Draft written feedback based on the 360 comments above.

If you managed this team member how would you weave the comments above into your written feedback?

* Step three: Turn to your elbow partner and share what you’ve written.
  + What theme(s) did you emphasize?
  + How did you contextualize the comments shared by this person’s colleagues?
* Step four: Read how this person’s manager incorporated the comments above into the Core Values portion of the PGP.

***PGP Excerpt from the manager’s comments:***

*You exhibit our core values at the highest possible level. I really would expect that if I looked up AF core values in Wikipedia, your picture would pop up! You are a true model of Team & Family, Everything with Integrity, and Whatever it Takes….*

*The only exception to your core values excellence is Sweat the Small Stuff, and I think we will cover this in the next section below. The theme I saw in your colleague’s comments relate mostly to detail orientation, communicating around details, and recognizing the impact of not sweating them more. Here are a few comments, “This comes through at times in how she meets or communicates about deadlines (even self-imposed ones), her eye for the logistical details that make a difference in successful workshops, and her follow-through on the little tasks that are a core part of her role,” and “While I think she exemplifies all of the core values, if I had to choose one, I would choose "Sweats the Small Stuff". She is a great project manager, however, I think she could be even more detail-oriented when planning logistics to ensure that everything is done efficiently and that the outcome matches the quality of her vision.*

# **Sample PGP Email to Team Members**

**Setting the stage for a great conversation**

Directions: Two days before a team member and manager sit down for their PGP conversation, the manager will email their completed PGP evaluation to the team member. Below is a sample email that the manager can send to the team member with the PGP. Please revise as needed.

**Hi Jared,**

I’m really looking forward to our PGP conversation Wednesday. It was a pleasure to reflect on all you have brought to our team and the Achievement First network. I look forward to recognizing the many improvements you’ve made this year and helping you to set goals that will ensure your continued growth.

This quote from your 360 feedback really gets at the heart of your strengths, “Jared is a true team player. He is always willing to discuss challenges with me and to help me to get make tough decisions. He also regularly shares resources with me. There is no question that Jared has helped me become a more effective communicator and project manager.”

Rather than going through the PGP line by line, here’s the approach I would like to take (see below). Please take 30 minutes to consider these questions.

* 45 minutes—Professional Growth Plan
  + What are the 2-3 biggest successes you have had and what has enabled them? How will you to continue to leverage your strengths?
  + What are the 2–3 themes or specific areas for improvement identified in your PGP? Do they resonate?
  + Based on your strengths and areas for improvement, what are your professional learning goals? How can we measure success? What support do you need?
* 15 minutes—Next Steps
  + Summarize next steps
  + *Jared to complete the last page of the PGP and send it to me (may need to include instructions for manager to draft the goals in advance of the meeting)*
  + We will review progress on goals monthly during our check-ins

Cheers,

Joan

# **PGP Conversations and Goal Setting**



This is only a tool! The magic happens in the relationship you have with your team members and the PGP conversation is the most important part of the evaluation cycle.

**How do you want your team member to FEEL after the feedback conversation?**

**What do you want your team members to DO after the conversation?**

**PGP Meeting Goal:** Ultimately, the goal of the conversation—whether with a high-performer or a low-performer, is to clearly articulate how they are doing in their role and to help them move to the next level. Focus your conversation on delving into the root causes of strong and weak behavior, and see if you can identify patterns.

**Prior to the Meeting:**

1. Schedule 60-90 minutes with each team member.
2. Send copy of blank evaluation to team member and request they evaluate themselves prior to meeting.
3. Review and organize key results, evidence, and notes. Gather input from resources.
4. After receiving the self-evaluation, complete the written PGP, including ratings and comments.
5. Write the summary. Identify the team member’s greatest strengths and areas for improvement. Consider the 20% of growth areas that will make 80% of the difference.
6. Do not complete the next steps/goal setting part of the summary. This part will be completed collaboratively during the meeting.
7. Email the team member your written evaluation 24-48 hours prior to the PGP conversation. A sample email is on page 11.
8. Do your homework before the meeting:
   1. Review your written review and the staff member’s self review. Get in the staff member’s head. What are they thinking? How are they approaching your time together? What do they want to be doing next year/five years from now?
   2. Go in with a tight plan/agenda of how you want to use your time together.
9. Meet with the team member within 2 weeks of receiving their PGP self-evaluation.

# **Best Practices for the PGP Feedback Conversation**

**Video Observations: Opening/Introduction**

1. **Opening/Introduction**
2. Start with a genuine thanks for their self-reflection and their time.
3. State your plan/agenda and timeframe at the start. See if the staff member has anything to add. *Sample Language: “By the end of this half hour, I’m hoping we can 1) take the time to celebrate the successes of the last few months 2) identify and agree on 2-3 areas of growth and 3) agree on the action steps/resources of “how” we’re going to address those areas of growth.”*
4. Nothing should be a surprise! (NOTE AGAIN: If something is a surprise you should still share it. Again, this should be a mental flag to be more direct in your conversations going forward. *Sample Language: “Hopefully everything we discuss today resonates and reflects the feedback you’ve been getting to date. Today is a check point conversation to make sure we’re all on the same page…..”)*
5. Remember, valuing the relationship (and conveying that message) is critical for making these productive conversations. A possible starting point is asking them for their initial thoughts after reading the review.
6. **Celebrate Success**
7. Spend at least 5-10 minutes on the good stuff. Don’t just jump to areas of growth. Take time to celebrate success!
8. What are the next steps for leveraging these strengths even more for the benefit of the team and/or network?
9. Make sure to highlight positives as important “keep doing” areas.
10. **Identify Areas for Growth**
11. Be sure to discuss the main idea of each Area of Growth one at a time. Your written feedback should include the most important specific examples you want to highlight and include very clear specific examples. Remember to focus on the most important areas to raise the bar – the 20% of growth areas that will make 80% of the difference.
12. Remember your feedback framework ☺: Description/Impact/Future:

Sample Language: *“When you…..Here’s what happens….Next time…”*

1. Don’t let the conversation stray into a debate about a specific event/incident. If it starts to, redirect! Your review is a focus on patterns of behavior.
2. Discuss discrepancies in your rating vs. the team member’s ratings – related to both strengths and areas for growth. If check-ins are occurring regularly, discrepancies should be minimal.
3. As applicable for top performers, this section should tie to their career growth plans. Where do they want to be next year/five years from now? How and why will development in these areas make (or not make) this trajectory a reality?
4. **Review summary and Set Goals**
5. Go to the last page of the PGP and discuss the summary of strengths and weaknesses with your team member. Discuss any additions or changes based on the feedback conversation. Make sure he or she really understands the heart of each issue.
6. Discuss and write specific goals to be reached in this area of growth. The more specific, the better; “personal organization” is not an appropriate goal because it is not specific enough to provide your team member with a roadmap to get there. A better goal would be *“I will capture all meeting next steps in OneNote and link to my Outlook tasks”.*
7. Brainstorm strategies and resources/support needed for addressing these focus areas.

*Sample Language: “What can you do to…..” “What’s preventing this from getting this done now?” “Are there resources that you need or things I can do to be of help?”*

1. Agree on the 1-2 action steps that the staff member wants to be held accountable for each goal. It’s critical that there is a very clear action plan for support and resources.
2. Confirm how and when progress will be tracked. *Sample Language: We have lots of ideas. What are the 1-2 that you going to commit to? These are the things I’m going to hold you to. I want to make sure we have agreed on clear action steps.*
3. **Conclusion**
4. Genuine thanks ☺
5. Be sure the staff member feels valued and respected and be sure they leave with a clear understanding of how you view their performance. Top performers should understand that they’re doing a really good job. Low performers should understand that they are not. (Depending on the conversation, you may need to reiterate this overall message at the end as necessary and appropriate.) *Sample language (low performers): “As we discussed, it is critical that XYZ happen….{going forward}…or{ by DATE.}” Next line if necessary: “If we don’t see this by DATE, we are going to have to consider additional next steps and possible consequences, including possible termination.”*

*Sample language (high performers): “While we’ve spent a good deal of our time discussing areas of growth, I want you to know you are doing a phenomenal job!”*

1. **Optional: Upward Feedback**

You may also use this as a time for the team member to ask for open and honest feedback on how they feel they are being managed and supported. Solicit ideas on how you can better support them and ensure a strong relationship, in the spirit of your own continuous growth and improvement. It’s probably important to separate out the conversations, but while you’re reflecting, it may be a good opportunity to give the team member a voice. *Sample Language: Do you feel like you have the materials and equipment to do your work right? Do you feel like you know what is expected of you? Do you feel like you have the opportunity to do what you do best every day…..?*

# **Performance Improvement Plans (PIP)**

The quality and commitment of staff are what make the real difference in the success of our network. While this can be a difficult task, identifying staff members who need help and taking the right steps to address their challenges is a critical part of running a successful organization.

Reasons to adopt clear guidelines for performance improvement include:

* Providing a struggling staff member clear guidance on exactly what must happen in order to improve his/her performance
* Providing everyone involved (e.g., team member, manager) an additional opportunity to determine if there are optimal alternate arrangements and/or whether this role is appropriate
* Maintaining a positive team culture by having a transparent and fair performance Improvement process
* Ensuring performance issues are dealt with in a way that meets all legal and professional standards

# *Implementing a PIP:*

Before deciding to implement a Performance Improvement Process for any low performing staff members, read the entire [Performance Improvement Guide](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/5-%20TALENT%20DEVELOPMENT/Talent%20Toolkit/Performance%20Improvement/READ%20FIRST%20Performance%20Improvement%20Tools%20Guide%20.docx). Ideally, the performance improvement process begins ***before*** a staff member is placed on performance improvement plan. **Note: The language in these materials is framed for a school audience. For specific guidance on how to adapt this process for a Network Support team member, please reach out to** [**Teresa Clarke**](mailto:teresaclarke@achievementfirst.org?subject=Question:%20PIP%20Process) **and cc** [**Alex Carr**](mailto:alexandraocarr@achievementfirst.org?subject=Question:%20PIP%20Process) **on Team Human Capital.**

***Once you’ve identified a low performing staff member, here is the recommended process for a PIP (click on underlined words to open documents).***

* Talk with Erica Williamson and your manager.
* Make sure that these performance concerns have been addressed with the staff member. If not, have a discussion with the staff member and follow-up with a [warning letter](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/5-%20TALENT%20DEVELOPMENT/Talent%20Toolkit/Performance%20Improvement/Warning%20Letter%20for%20Performance%20Concerns.docx).
* Develop a [PIP memo](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/5-%20TALENT%20DEVELOPMENT/Talent%20Toolkit/Performance%20Improvement/PIP%20Initial%20Memo%20Template.docx) and [action plan](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/5-%20TALENT%20DEVELOPMENT/Talent%20Toolkit/Performance%20Improvement/PIP%20Action%20Plan%20Template.docx) and send it to your manager and Erica Williamson (Team Human Capital).
  + See [here](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fSchool%20Leader%2fShared%20Documents%2f5%2d%20TALENT%20DEVELOPMENT%2fTalent%20Toolkit%2fPerformance%20Improvement&FolderCTID=&View=%7b13FDC25C%2dC23E%2d4521%2dA4CE%2d55E34037D022%7d) for completed examples.
* Meet with the staff member to review your concerns with his or her performance and carefully explain the action plan (optional: coach should also attend the PIP Initial meeting).
* Monitor staff member performance over the next four to eight weeks with weekly check-ins
  + PIPs are in 4 week increments. After 4 weeks, assess whether the staff member has made enough improvement to continue with the plan. Even if there is improvement, most staff members should stay on the PIP for 4 more weeks to ensure the improvement is sustained.
* After 4 weeks: Mid-term review of performance to provide staff member with feedback on their progress. In most cases, staff members not showing any improvement after 4 weeks should not continue on a PIP.
* After 8 weeks: Final review of performance with PIP outcome (continuation or termination).

***Professional Growth Plans and Performance Improvement Plans***

* **If the person needs a relatively strong warning:**
  + Consider providing a warning letter before completing the PGP.  Review a sample [warning letter](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/5-%20TALENT%20DEVELOPMENT/Talent%20Toolkit/Performance%20Improvement/Warning%20Letter%20for%20Performance%20Concerns.docx) this letter can be customized.
  + At a later time, if necessary, a PIP may be implemented.
  + Note, in order to have everything completed by April, the PIP must start no later than March. If performance has not improved the result may be a non-renewal.
* **If the person is significantly underperforming and needs a stronger message:** 
  + A strongly phrased PGP can lead directly into a PIP.
  + When a PIP is implemented directly after the PGP, the “Performance Summary & Goal Setting” at the end of the PGP is replaced with the PIP documents.
* **If this person’s performance may result in a mid-year termination:**
  + Move immediately into a PIP and bypass the PGP.
  + This is recommend only if someone has demonstrated significant underperformance over a substantial amount time. (e.g., A teacher who was on staff last year and consistently struggled with the same performance issues.)

***Performance Improvement Tool Contents*** (Click[here](https://afnet.achievementfirst.org/School%20Leader/Shared%20Documents/Forms/AllItems.aspx?RootFolder=%2fSchool%20Leader%2fShared%20Documents%2f5%2d%20TALENT%20DEVELOPMENT%2fTalent%20Toolkit%2fPerformance%20Improvement&FolderCTID=&View=%7b13FDC25C%2dC23E%2d4521%2dA4CE%2d55E34037D022%7d) to open PIP folder on Shared Server)

* Performance Improvement Tools guide
* PIP Initial Memo, Action Plan & Final Review Memo
* Termination guidelines for PIP & sample termination notice
* Examples: There are several completed examples, including a successfully completed PIP, a PIP ending in termination, and a PIP started after the Professional Growth Plan process.

***Resources***

* If you need any more guidance, please feel free to reach out to Erica Williamson, Director of Human Capital. If necessary, we can obtain legal advice on any particularly difficult issues.

# **Sample Goal-Setting Handout**

Directions: Consider sharing the information below, including the sample strong and weak goals, with your team. Please revise as needed.

**Step-by-Step Guide to creating SMART goals:**

|  |  |
| --- | --- |
| **S** | Smart |
| **M** | Measureable |
| **A** | Attainable |
| **R** | Relevant |
| **T** | Time-Bound |

***‘SMART’ is an acronym for five characteristics of a well crafted goal. For a goal to be SMART it must be specific, measurable, achievable, realistic, and timely. For more information on how to write SMART goals, follow the steps below and review the strong and weak sample goals at the end of this section.***

**Step 1: Be *specific*.**

* Determine what exactly you plan to accomplish.
* Narrowing in on the details that will clarify what needs to be accomplished and will help make the goal a reality.

**Step 2: Make it *measureable*.**

* Measurable goals are easier to track, more likely to be accomplished, and will leave goal-setters with a stronger sense of achievement when the goal is completed. When possible, goals should be quantifiable (include specific numbers).
* To determine if a goal is measurable, ask questions such as: How much? How many? How will I know when it is accomplished? Incorporate the answers to these questions into the goal.
* time-frame. Including a specific window of time is another way of making sure the goal is specific, measureable and attainable.

**Step 3: Be sure it is *attainable*.**

* Keep the bar high, but realistic. Strong goals feel like a stretch, but not an impossible leap. Remember, most any goal can be met with the right planning and support.

**Step 4: Make sure it is *relevant*.**

* By identifying goals that make the difference in our professional practice, we increase our impact on our schools and our scholars.

**Step 5: Check that it is *time-bound*.**

* A goal should be grounded within a stated time-frame. Including a specific window of time is another way of making sure the goal is specific, measureable and attainable.

***SAMPLE SMART GOALS:***

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Role** | **Strong Goal** | **What makes this goal strong?** | **Weak Goal** | **What makes these goals weak?** |
| **Manager** | **Ongoing Constructive Feedback to Direct Reports:**  I will share clear, positive and constructive feedback with Chris during each check-in and in formal debriefs at the end of each project. Debriefs will occur within one week of a project’s completion. Feedback to Chris will include key elements that went well and areas for his continued focus. I will also encourage more reflection and dialogue around feedback. | It is clear what the goal is (more feedback to Chris). There is also an embedded strategy for meeting this goal (giving feedback during check-ins and in debriefs). Lastly, the goal is measurable. The manager will be able to assess themselves against this goal. | Regularly share feedback with Chris. | * Overly general; lacking in details. * Difficult to measure, overly reliant on qualitative comparisons. * Attainable, but too broad to stretch the goal’s author to the next level. * Relevant, but not as likely as the strong examples to make a huge difference. * The lack of time parameters makes it difficult to hold the goal setter accountable or measure progress towards the goal. |
| **Team Member** | **Personal Organization:**  I will use each Friday afternoon to create a weekly worksheet. This process will include reviewing the prior week’s worksheet and adding any items that were not accomplished. I will also include items from my monthly map and notes from my check-in to next week’s worksheet. At each check-in with my manager, I will review my progress towards my monthly map. At the end of each month, I will ask my manager for feedback on my personal organizational systems. I will also assess my success by reviewing the goals on my monthly map – each month I will hit 95% of my goals. | This goal specifically outlines a relevant, time-bound strategy for increasing personal effectiveness. There are clear, measureable next steps necessary to meet this goal. | I will improve my organizational skills. |

# **3What to Do After the Meeting**

1. Make any changes to the PGP and type the goals on the last page. Share the final PGP and goal setting sheet and share it with your team member.
2. Save the final PGP as: “Network Support Team Name\_ Last Name\_ First Name \_ 2013-2014 PGP”

EXAMPLE: Team Talent Dev\_Chapman\_Erica \_2013-2014 PGP.

1. [**Submit PGPs using Many Minds**](https://manyminds.achievementfirst.org/sites/NetworkSupport/TeamCoS/NSPGP/_layouts/15/Upload.aspx?List=%7b72AFAE3A-E22A-4763-8174-0A81D0D60825%7d&RootFolder=) **by May 12, 2014**.

[](http://s3.hubimg.com/u/291658_f260.jpg)

1. Keep the signed hard copy on file.

**Resources:  *All PGP documents are housed*** [***on Many Minds***](https://manyminds.achievementfirst.org/sites/NetworkSupport/TeamCoS/NSPGP/default.aspx)

***Questions:*** Reach out to [Tracey Geller](mailto:traceygeller@achievementfirst.org) or [Emile Session](mailto:emilesession@achievementfirst.org).

# 1**What next steps will you take to prepare for the PGPs?**

|  |  |  |
| --- | --- | --- |
| What? | When? | Who? |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

**How will your team continue to use the PGP throughout the year?**

