2021-22 Cornerstone Completion Policy for Staff Development Cycle & Bonus Task

SDC Goal Setting Set performance and development goals aligned to individual roles, team or functional groups, and organization drivers.	**August 2, 2021 – October 1, 2021**
SDC 2x2 Conversations Engage in 2x2 feedback with managers & team members aligned to goals and current performance.	**February 1, 2022 – March 18, 2022**
SDC Annual Performance Review Goal PTG & overall performance evaluations for the year.	**May 2, 2022 - June 17, 2022**
Goal & Bonus Review Final APR goal updates & Bonus Task completion.	**September 2022**

Driving Goal: 100% completion of all Cornerstone tasks by managers and direct reports by respective deadlines for the 2021-22 school year.

Why: To improve performance, employee experience, and retention of IDEA staff. To ensure team member performance and development structures are engaged in with fidelity. To create alignment with our new Core Values and increase overall Staff Development Cycle (SDC) completion, equity and accountability. In addition to the rationale above, we also engage in these processes to ensure:

- Clarity and understanding of impact to bonuses and bonus payout for direct reports and managers.
    - SDC data and information is also used as helpful reference and discussion points for decisions on merit increases, promotions, and Sr. designations.
- Improved clarity and alignment between managers and employees of expectations, strategies, and performance, "Clear is Kind."
    - Being clear with our people on where they stand, what their gaps are, strengths are, and development areas are allows them to be their best every day for our scholars!
- Equity in level of transparency and consistency in goals across individuals and teams.

Where: The following links and resources are available to help achieve completion of Cornerstone tasks.

For effective SDC engagement, we encourage you to begin with understanding and unpacking scorecards to clarify success and coaching or management needs for your role and the roles you directly manage. It is a best practice for managers to understand the knowledge and skills the people you directly manage need to exemplify in their work. See this **Teacher Transition Plan** as a strong exemplar and potential template for what you can do as a manager to set yourself and your direct report up for success.

All full-time staff members, other than teachers, are bonused based on goals set on the Staff Development Cycle. Teachers are bonused based on the Teacher Career Pathway. For more information on Goals/Bonuses, please visit the Compensation and Benefits Home Page.

- HERE is the 21-22 Performance/Incentive Pay Bonus Eligibility Table that will give more details on bonus eligibility for the 2021-2022 school year.

The Talent Management Hub Page houses all primary context and resources for the Staff Development Cycle, found HERE:

- Goal Setting
- Talent Reviews
- 2x2 Conversations
- APRs
- Goal & Bonus Review

Impact: When we accomplish this goal, we uphold equity and increase access and understanding of performance *and* performance-based pay for managers and direct reports. When we do this right, our people can focus on the impact and outcomes of their work.

- **<mark>Failure by the employee</mark>** to complete the goal setting task by the deadline will result in *not being eligible for bonus payout, as goals were not set in time for an equitable determination of performance.*
    - In instances where an employee has completed the required tasks, considerations will be made that prevent direct reports from being negatively impacted by manager actions.
- **<mark>Failure by the manager</mark>** to complete any Cornerstone task for any of his/her direct reports will affect manager's:
    - Full eligibility for bonus payout.
        - Decrease in bonus payout up to ***20%*** of functional bonus potential.
    - Bonus payout to be put ***on hold*** until all tasks for direct reports are complete.
- **<mark>Failure by the Organization</mark>** to uphold our policy with fidelity results in:
    - Team members are distracted by the fairness of their pay vs. others rather than focused on impact of their own work.
    - Legal risk to the organization – where performance-based pay (bonuses) are involved, we are required to have on record that the manager and employee were both aware of the goals, with time to achieve them. We are audited on this *all the time*.

How - Manager Responsibilities:

- Actively ensuring their direct reports are submitting their goal setting, 2x2, and APR tasks by the assigned deadlines for each task.
- Submitting their own goal setting, Talent Reviews, 2x2's, APRs, and Bonus Tasks for *each one* of their direct reports by the assigned deadlines for each task.
- **Manager Assignments:**
    - The performance manager who is assigned a direct report for Goal Setting will continue to be assigned to that same direct report for the duration of the SDC unless an [Employee Change Form](#) is submitted.
    - When a performance manager leaves prior to the end of the year, the direct report will be automatically assigned to the replacement manager **OR** the *prior* performance manager's manager, by default.
    - When a performance manager transitions roles after March 1st, the direct report will remain automatically assigned to that same performance manager, by default.
    - The performance manager responsible for completing the APR is the default manager for the Bonus confirmation. If that manager is no longer available, a new manager will be explicitly assigned to complete that task for the employee.

Policy Timelines, Deadlines, & Cut-Off Dates:

45 days	The number of days managers and direct reports have from the task assignment to complete each round of the Staff Development Cycle, even if hired after the original windows outlined above. *If not completed 45 days after hire, full bonus payout will be impacted.*
Last Day of February	Role transitions and new hires will get assigned a new SDC goal-setting task in Cornerstone, to be completed **within 45 days of start date in the role.**

Employee Leave or FMLA	SDC Tasks can be reopened if employees or their managers were on leave during the time that overlapped within the deadline date. • Returning team members will have 45 days to complete any missed tasks, beginning the day of their return to work.
Co-Planner Clause	**FOR MANAGERS**: If you are on leave or plan to be on leave, then you can assign a Co-planner to complete your pending tasks in Cornerstone to ensure submission before the task deadline. • Submit Co-planner request to cornerstone@ideapublicschools.org.
FOR NEW HIRES	New hires will lead to a new SDC goal-setting task in Cornerstone, to be completed **within 45 days of start date in the role OR March 1.** **Bonus eligibilities listed below are contingent upon goal setting for new hires.**
	New hires with a work start date BEFORE January 1 will be eligible for 100% of their bonus eligibility of their role *only if* Goal Setting, APR, and goal confirmation/bonus tasks have been completed by March 1.
	New hires with a work start date BETWEEN January 1 until the last day of February will be eligible for 50% of their bonus eligibility based on the role (e.g., if 10% of salary normally, would be eligible for 5%) *only if* Goal Setting, APR, and goal confirmation/bonus tasks have been completed.
	New hires with a work start date on or AFTER March 1 will not receive a SDC goal-setting task and are not eligible for a bonus pay out for that fiscal year (they will be for the following year).
FOR REHIRES	Employees that **exited IDEA in good standing and had a completed APR on file** before exit will still be eligible for a Performance/Incentive Pay bonus payout, **if rehired within 90 days.**
FOR ROLE TRANSITIONS	**BEFORE JANUARY: Role transitions with a work start date BEFORE January 1 will be eligible for 100%** of their bonus eligibility of *only* their new role and *only if* a Goal Setting, APR, and confirmation/bonus tasks have been completed.
	BEFORE MARCH: Role transitions with a work start date BETWEEN January 1 until the last day of February will be eligible for 50% of their bonus eligibility **based on the previous role and another 50% of their bonus eligibility based on the new role** (e.g., If 10% of salary of former role, and 10% of salary of new role, would be eligible for 5% of each) *only if* Goal Setting, APR, and goal confirmation/bonus tasks have been completed.
	AFTER MARCH: Role transitions with a work start date on or AFTER March 1 will be eligible for 100% of their bonus eligibility of *only* their previous role and *only if* Goal Setting, APR, and goal confirmation/bonus tasks have been completed.
	Goal adjustments can be made for role transitions that have a **work start date before March 1.**
FOR LEADER TRANSITIONS (See additional leader transition information **HERE**)	**ADJUSTMENTS TO GOALS: If or when a leader transitions to a new role,** changes to any components of the SDC – specifically their goals - should be done **BEFORE MARCH 1** in order to be part of the APR. • **Leader transitions** without goal adjustments made prior to **MARCH 1** will be bonused based on their previous role.
	In the case of PIR or API (or DI Coach) to be named Principal, leaders do not transition into the Principal title until July. Therefore, the % target for their initial role applies even if named in November or April or February. • Goal adjustments for named principals includes the removal of 2 prior goals and the replacement with the 2 specific named principal goals within 2 weeks of transition.

	• Remaining goals from previous role will still be used to determine bonus payout.

Support Teams

- **For questions, clarifications, or support with SDC tasks or this policy:** Managers or employees can reach out to Elise Gilbert, VP of Talent Management
    - o **For any Cornerstone Task or Troubleshooting Support**, please email Cornerstone@ideapublicschools.org
    - o **For any Talent Management SDC Task Support**, please email talentmanagement@ideapublicschools.org
    - o **For any Performance/Incentive Pay, Bonus, and Compensation support**, please email compensationsupport@ideapublicschools.org

APPENDIX

I. **LEADER TRANSITIONS** *(Please note this section is pending additional review or potential revisions)*

If you transition to the following role PRIOR TO MARCH 1	Then you update your SDC goals to include…
Successor Principal (i.e. you become principal of an existing IDEA school that already has students)	Any 2 of the following options: • **Student Achievement**: This could be written as… ○ School earns an A rating. ○ School earns X% / X% / X% on state assessments. ○ X% students end the year on or above grade level (for Academies without state assessments). ○ Similar schoolwide student achievement goal • **Persistence**: This could be written as… ○ School meets 90% student persistence. ○ School meets 90% new student persistence. • **Retention**: School meets 85% staff retention. • **Attendance**: School meets 97.5% attendance. The successor principal proposes which 2 goals they want to add based on campus needs and the time of year that they transition. The VP for the school approves their choices. Final goal adjustments are approved by VP of Talent Management.
Launching Principal (i.e. you are named to launch a new IDEA school that will open in the fall)	The following two goals: 1) **Enrollment**: All grade levels are 100% enrolled by the 11th day of school. 2) **Staffing**: 100% of vacancies are filled by the first day of the employee's work calendar OR their first day of summer training (whichever comes first).