

## 2022-23 STAFF DEVELOPMENT CYCLE COMPLETION POLICY

<u>Goal Setting</u> Set performance and development goals aligned to individual roles, team or functional groups, and organization drivers.	Dates TBD
<u>2x2 Conversations</u> Engage in 2x2 feedback with managers & team members aligned to goals and current performance.	Dates TBD
<u>Annual Performance Review</u> Goal PTG & overall performance evaluations for the year.	Dates TBD
<u>Goal &amp; Bonus Review</u> Final APR goal updates & Bonus Task completion.	Dates TBD

**DRIVING GOAL:** 100% completion of all Cornerstone tasks by managers and direct reports for the 2022-23 school year.

**RATIONALE:** To create alignment with our new Core Values and increase overall Staff Development Cycle (SDC) completion, equity, and accountability. To ensure we are acting with integrity in our goal setting, progress monitoring, and attainment processes.

We specifically engage in the SDC to ensure IDEA Team and Family Members:

- Have a clear understanding of their role with IDEA, expectations for performance, and measures of success
- Have formal interactions documented in a system of record for goal attainment, performance evaluations (mid and end of year), & feedback interactions that facilitate development and growth at IDEA
- Have an established process and system connecting the SDC to the compensation and bonus payout policy

### **POLICY PARAMETERS:**

- **GOAL SETTING ENGAGEMENT**
  - All full-time employees will participate in the SDC at IDEA
  - All participating team members must complete goal setting, 2x2s, and annual performance reviews to ensure eligibility for aligned reward pay
- **GOAL SETTING BY ENTITY**
  - **Goals MUST be identified** and aligned by employment entity and attributed accurately to entity (TX)
  - Any Org Wide (IDEA TX) goals will be Non-Bonusable
    - **TEXAS National team** members **paid by TX** will have the same performance pay structure for 22-23, with TX-wide goals replacing org-wide goals, and individual goals
    - **Regional team** members will have the same performance pay structure for 22-23, with regional goals replacing org-wide goals, and individual goals
- **GOAL SETTING FRAMEWORK**
  - All staff will use the [SMART Goal Setting Framework](#) (*draft version*) and will be audited on the criteria for all bonusable goals
- **GOAL SETTING ATTAINMENT**
  - Goal attainment will follow an ‘**All or Nothing**’ attainment practice; meaning there will be no partial attainment/rewards
- **GOAL ATTAINMENT & REWARD PAY**
  - **GOAL DATA & METRIC ATTAINMENT VALIDATION WILL**
    - Align to TEA/State/National definitions & formulas for evaluating our data and results

- Utilize protected internal data tracking & calculation systems (dashboards)
- Be audited by specific areas and divisions we can minimize data validity by relying on individualized or independent tracking
- **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 Eligibility Table that will give more details on bonus eligibility for the 2021-2022 school year. *(Will update with new 22-23 documents and pages when completed)*

**POLICY EXPECTATIONS:** Each IDEA team member is expected to complete the Cornerstone tasks, that operate as our system of record, for the SDC. When we do this right, our people can focus on the impact and outcomes of their work.

- **FAILURE BY THE EMPLOYEE** to complete the goal setting task by the deadline will result in *not being eligible for performance pay 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.
- **FAILURE BY THE MANAGER** to complete any Cornerstone task for any of his/her direct reports will affect manager's:
  - Full eligibility for performance pay payout.
    - Decrease in performance pay payout up to **20%** of functional performance pay potential.
  - Performance payout to be put **on hold** until all tasks for direct reports are complete.
- **FAILURE BY THE ORGANIZATION** to uphold our policy with fidelity results in:
  - Legal risk to the organization – where performance-based pay (rewards) 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*.
- **FAILURE BY ANY EMPLOYEE OR MANAGER** to finalize and submit goals by the March 1 deadline, for role changes or new hires, will result in ineligibility of functional performance pay potential
- **FAILURE BY ANY EMPLOYEE OR MANAGER** to accurately document evidence, data, and goal attainment, to the best of their ability, will result in ineligibility of functional performance pay potential
- **IF IT IS DETERMINED BY AUDIT** that any IDEA employee misrepresented or manipulated their goals, goal attainment, goal evidence or final status to intentionally earn funds for which they are not otherwise entitled, all bonus eligibility will be removed for that year

**RESOURCES & GUIDELINES:** The following links and resources are available to help achieve completion of Cornerstone tasks and resources for the Staff Development Cycle, found [HERE](#):

- [Goal Setting](#)
- [2x2 Conversations](#)
- [APRs](#)
- [Goal & Bonus Review](#)

**POLICY TIMELINES, DEADLINES, & CUT-OFF DATES:**

<b>45 days</b>	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. <i>If not completed 45 days after hire, full bonus payout will be impacted.</i>
<b>Last Day of February</b>	Role transitions and new hires will get assigned a new SDC goal-setting task in Cornerstone, to be completed <b>within 45 days of start date in the role.</b>
<b>Employee Leave or FMLA</b>	SDC Tasks can be reopened if employees or their managers were on leave during the

	<p>time that overlapped within the deadline date.</p> <ul style="list-style-type: none"> <li>Returning team members will have 45 days to complete any missed tasks, beginning the day of their return to work.</li> </ul>
<b>Co-Planner Clause</b>	<p><b>FOR MANAGERS:</b> 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.</p> <ul style="list-style-type: none"> <li>Submit Co-planner request to <a href="mailto:cornerstone@ideapublicschools.org">cornerstone@ideapublicschools.org</a>.</li> </ul>
<b>FOR NEW HIRES</b>	<p>New hires will lead to a new SDC goal-setting task in Cornerstone, to be completed <b>within 45 days of start date in the role OR March 1.</b>  <b>Bonus eligibilities listed below are contingent upon goal setting for new hires.</b></p>
	<p><b>New hires with a work start date BEFORE January 1 will be eligible for 100%</b> of their bonus eligibility of their role <i>only if</i> Goal Setting, APR, and goal confirmation/bonus tasks have been completed by March 1.</p>
	<p><b>New hires with a work start date BETWEEN January 1 until the last day of February will be eligible for 50%</b> of their bonus eligibility based on the role (e.g., if 10% of salary normally, would be eligible for 5%) <i>only if</i> Goal Setting, APR, and goal confirmation/bonus tasks have been completed.</p>
	<p><b>New hires with a work start date on or AFTER March 1 will <u>not</u> receive a SDC goal-setting task</b> and are <u>not</u> eligible for a bonus pay out for that fiscal year (they will be for the following year).</p>
<b>FOR REHIRES</b>	<p>Employees that <b>exited IDEA in good standing and had a completed APR on file</b> before exit will still be eligible for a Performance/Incentive Pay bonus payout, <b>if rehired within 90 days.</b></p>
<b>FOR ROLE TRANSITIONS</b>	<p><b>BEFORE JANUARY:</b> Role transitions with a work start date <b>BEFORE January 1 will be eligible for 100%</b> of their bonus eligibility of <i>only</i> their new role and <i>only if</i> a Goal Setting, APR, and confirmation/bonus tasks have been completed.</p>
	<p><b>BEFORE MARCH:</b> Role transitions with a work start date <b>BETWEEN January 1 until the last day of February will be eligible for 50%</b> of their bonus eligibility <b>based on the previous role and another 50% of their bonus eligibility based on the new role</b> (e.g., If 10% of salary of former role, and 10% of salary of new role, would be eligible for 5% of each) <i>only if</i> Goal Setting, APR, and goal confirmation/bonus tasks have been completed.</p>
	<p><b>AFTER MARCH:</b> Role transitions with a work start date <b>on or AFTER March 1 will be eligible for 100%</b> of their bonus eligibility of <i>only</i> their previous role and <i>only if</i> Goal Setting, APR, and goal confirmation/bonus tasks have been completed.</p>
	<p>Goal adjustments can be made for role transitions that have a <b>work start date before March 1.</b></p>
<b>FOR LEADER TRANSITIONS</b> (See additional leader transition information <a href="#">HERE</a> )	<p><b>ADJUSTMENTS TO GOALS:</b> If or when a leader transitions to a new role, changes to any components of the SDC – specifically their goals - should be done <b>BEFORE MARCH 1</b> in order to be part of the APR.</p> <ul style="list-style-type: none"> <li><b>Leader transitions</b> without goal adjustments made prior to <b>MARCH 1</b> will be bonused based on their previous role.</li> </ul>
	<p><b>In the case of PIR or API (or DI Coach) to be named Principal,</b> 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.</p> <ul style="list-style-type: none"> <li>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.</li> <li>Remaining goals from previous role will still be used to determine bonus payout.</li> </ul>

## 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
  - **For any Cornerstone Task or Troubleshooting Support,** please email [Cornerstone@ideapublicschools.org](mailto:Cornerstone@ideapublicschools.org)
  - **For any Talent Management SDC Task Support,** please email [talentmanagement@ideapublicschools.org](mailto:talentmanagement@ideapublicschools.org)
  - **For any Performance/Incentive Pay, Bonus, and Compensation support,** please email [compensationsupport@ideapublicschools.org](mailto:compensationsupport@ideapublicschools.org)

# APPENDIX

## I. MANAGER ACCOUNTABILITIES

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 1<sup>st</sup>, 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.

## II. 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...
<p><b>Successor Principal</b> (i.e. you become principal of an existing IDEA school that already has students)</p>	<p>Any 2 of the following options:</p> <ul style="list-style-type: none"> <li>• <b>Student Achievement:</b> This could be written as...               <ul style="list-style-type: none"> <li>○ School earns an A rating.</li> <li>○ School earns X% / X% / X% on state assessments.</li> <li>○ X% students end the year on or above grade level (for Academies without state assessments).</li> <li>○ Similar schoolwide student achievement goal</li> </ul> </li> <li>• <b>Persistence:</b> This could be written as...               <ul style="list-style-type: none"> <li>○ School meets 90% student persistence.</li> <li>○ School meets 90% new student persistence.</li> </ul> </li> <li>• <b>Retention:</b> School meets 85% staff retention.</li> <li>• <b>Attendance:</b> School meets 97.5% attendance.</li> </ul> <p>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.</p> <p>Final goal adjustments are approved by VP of Talent Management.</p>
<p><b>Launching Principal</b> (i.e. you are named to launch a new IDEA school that will open in the fall)</p>	<p>The following two goals:</p> <ol style="list-style-type: none"> <li>1) <b>Enrollment:</b> All grade levels are 100% enrolled by the 11<sup>th</sup> day of school.</li> <li>2) <b>Staffing:</b> 100% of vacancies are filled by the first day of the employee's work calendar OR their first day of summer training</li> </ol>

(whichever comes first).