FREQUENTLY ASKED QUESTIONS

Non Represented – Performance Appraisal

1. **What is the review cycle for Non-Represented employees?**
   The review cycle for Non Represented has been updated to be annual. The review period follows the fiscal/academic year, July 1st through June 30th.

2. **Why did the review cycle change from every two years to every year?**
   The Board of Directors and our PPS Executive leadership have updated our review cycle to better align with the best practice of providing feedback to employees on a more regular basis, in this case an annual review.

3. **When do reviews need to be completed by?**
   June 30, 2019, is the review submission date.

4. **What is the performance period for reviews submitted by June 30, 2019?**
   The review period will cover two fiscal/academic years: 2017/2018 and 2018/2019.

5. **What if a review was completed last year?**
   If a review for an employee was completed last year and covered the 2017/2018 fiscal/academic year, the review completed this year only has to cover the 2018/2019 year.

6. **What is the cutoff date for new hires who require a review?**
   Any employee hired on or before December 31, 2018 will need to have a review completed.

7. **Who enters reviews into PeopleSoft?**
   Managers, or if necessary their designee, can complete the review documentation in PeopleSoft for direct reports. Employees cannot enter information into PeopleSoft.

8. **There are an additional eight competencies. Who do these apply to?**
   If you supervise any other employee, your review will be based on the five (5) competencies and the additional eight (8) leadership competencies.

9. **Do I have to put a comment in each section?**
   All of the PeopleSoft fields are not required to be filled. However, it is highly recommend managers make comments in each section. You must put a comment in each section that you give a "Role Model" or "Improvement needed" rating.

10. **What is the purpose of the self appraisal form?**
    The self-appraisal form was created to be a working document for employees in helping them to reflect back on the past year and think about future expectations. The form should be brought to the review conversation by each Non-Represented employee to ensure all relevant topics are discussed. Managers may request the form prior to the review meeting.

11. **Is the Self Appraisal worksheet placed in my personnel file?**
    No, the worksheet is simply a working document to assist in the review process. It does not become part of the employee's permanent record.

12. **Do I still need to print out a copy of the review, or is submitting it in PeopleSoft sufficient?**
    Yes, a hard copy of the review must be printed out and acknowledged through a signature by the employee and manager. The signed review needs to be submitted to Human Resources. The review documentation will be completed in PeopleSoft and submitted through PeopleSoft as well.

13. **Who can I contact if I have any questions regarding the process?**
    General Questions: Please send questions to Human Resources at CCinquiries@pps.net.
    PeopleSoft Questions: Please send questions to hristeam@pps.net

14. **What happens if a review is not completed?**
    A current review must be on file for an employee in order to be eligible for a COLA or step increase in the event they are budgeted.

15. **What happens if someone had more than 1 manager in the year?**
    The current manager will need to complete the review in PeopleSoft. However, the current manager should connect with the prior manager/s if possible.

16. **What should a new manager at PPS do if they haven't been her the entire year?**
    If possible, connect with prior managers or next level managers for the employee about contributions throughout the year. If this isn't possible, the manager should document performance given the information that is available.

PPS Employee Performance Appraisal Tool

For Non-Represented Staff

This is a sample only – actual evaluations must completed and submitted in PeopleSoft

Employee information

Employee name	Position title/department	Date of Hire	Employee ID number
Supervisor's name	Today's date	Evaluation period	

Describe any significant events or changes which occurred during the appraisal period which may have impacted the employee's ability to meet performance goals and/or expectations

Performance rating guide:

R = **Role Model**. Results exceed expectation and goals on a consistent basis. Makes significant contributions well beyond requirements. Serves as role model for peers

E = Exceeds Standards. Frequently goes beyond the standards for the position. Can consistently be counted on to produce quality results.

M = **Meets Standards**. Achievements are fully and consistently on target. Goal fully met. Describes performance of majority of employees. Makes a valuable contribution. Is fully competent.

P = Progressing. Results are usually on target. Goal partially met. May need occasional support. Still learning how to perform responsibilities independently**.**

I = Improvement Required. Improvement clearly needed. Little progress made toward goal. Is inconsistent in performance and requires excessive supervision. An action plan for improvement in this area needed.

Looking Back

Part A: Key Job Responsibilities, Goals and Objectives – what was accomplished this year? 60%

The job specific responsibilities/assignments/goals were established as part of last year's appraisal. Now is the time to evaluate how successful you were in fulfilling these responsibilities and what can be learned for future goals and development.

Key responsibility (list essential job functions below) (# will vary by position)	Method for measuring results (Describe threshold indicator)	To what degree were key responsibilities met				
		R	E	M	P	I
1.						
2.						
3.						
4.						
5.						

Special assignments/goals (# will vary by individual)	Desired goal (established when goal was set)	Actual result	To what degree were goals met?				
			R	E	M	P	I
Goal #1:							
Goal #2:							
Goal #3:							
Other responsibilities:							

Comments: what contributed to the level of result reached in each area?

Overall performance rating for Job Responsibilities, Goals & Objectives during evaluation period:
Provide an overall rating based on the collective ratings of the goals and responsibilities listed above.
Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Part B: Core Behavioral Competencies - 40%

The core competencies are the accountabilities shared by all employees. They are the behavioral skills and abilities integral to the PPS Core Values:

Integrity: *Is consistent, fair and ethical*	Current Level of effectiveness				
	R	E	M	P	I
Consistency					
Fairness					
Ethical					

Comments on Integrity:

Overall Rating for Integrity

Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Accountability: *Proactively sees the reality of a situation, assumes personal responsibility to find ways to address issues and reach results. Internally motivated to create positive outcomes.*	Current Level of effectiveness				
	R	E	M	P	I
Creating Quality Results					
Assuming responsibility for actions and outcomes					
Innovative problem solving and decision making					

Comments on accountability:

Overall Rating for Accountability
Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Communication Effectiveness: *Demonstrates understanding for others' ideas and is able to create understanding for own thoughts using written and verbal methods. Uses communication approach appropriate for the situation. Is able to give and receive constructive feedback.*	**Current Level of effectiveness**				
	R	**E**	**M**	**P**	**I**
Transparency					
Written and verbal communication skills					
Give and receive constructive feedback					

Comments on communication effectiveness:

Overall Rating for Communication Effectiveness
Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Collaboration and Teamwork: *Works collaboratively with others to achieve a shared goal. Works with colleagues to overcome barriers which may surface. Cooperates, using their interpersonal skills and providing constructive feedback. Able to address conflict constructively and respectfully.*	**Current Level of effectiveness**				
	R	**E**	**M**	**P**	**I**
Creates a positive, constructive work environment					
Partnership oriented					
Values Diversity.					

Effective conflict resolution	

Comments on collaboration and teamwork:
Overall Rating for Collaboration and Teamwork
Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Service Orientation *Focuses on proactively meeting responsibilities in a way that meets the needs of the internal or external customer of those services. Willingly makes changes to improve services*	**Current Level of effectiveness**				
	R	**E**	**M**	**P**	**I**
Customer Service					
School and student focused:					
Adaptable to changing environment					

Comments on service orientation:
Overall Rating for Service Orientation
Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

PPS Employee Performance Appraisal Tool

For Non-Represented Staff

Additional competencies for Managers and Supervisors	R	E	M	P	I
Managing and developing people Examples: *Recruits, retains and develops high performing individuals who are aligned with PPS's goals and values.*					
Cross functional leadership Examples: *Effectively aligns all stakeholders in designing and implementing needed change.*					
Business Acumen Examples: *Uses effective tools and methods to manage the operational aspects of area of responsibility*.					
Political Savvy/External Awareness Examples: *Understands dynamics of and is able to work effectively in a public organization.*					
Change Agent Examples: *Able to turn vision into workable plan. Engages employees in the entire process and develops commitment for sustaining change.*					
Evaluation Compliance Examples: *Completes and delivers performance evaluations to direct reports within established timeline.*					
Strategic Thinking Examples: *Formulates effective strategies consistent with the organization's mission and vision. Examples political issues and strategic planning with a long-term perspective. Determines objectives and sets priorities; anticipates potential obstacles or opportunities.*					
Leveraging Diversity Examples: *Recruits, develops, and retains diverse high quality workforce in an equitable manner. Leads and manages an inclusive workplace that maximizes the talents of each person to achieve sound business results. Respects, understands, values and seeks out individual differences to achieve the mission of the organization.*					

Comments on additional competencies for Managers and Supervisors:

PPS Employee Performance Appraisal Tool

For Non-Represented Staff

Summary Rating Page:

Performance Rating on Core Behavioral Competencies: 40%
Based on the ratings on the 5 (or 13 if supervisor or manager) core competencies above, give this employee an overall rating on behavioral competencies:

Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Performance rating for Job Responsibilities, Goals & Objectives during evaluation period (Part A) 60%

Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

OVERALL PERFORMANCE RATING:

Role Model ☐ Exceeds Standards ☐ Meets Standards ☐ Progressing ☐ Improvement Required ☐

Strengths and areas for development

Based on the employee's performance during the appraisal period, what are his/her 2-3 greatest strengths?

1.

2.

3.

Based on the employee's performance during the appraisal period, what are his/her 2-3 most important development areas?

1.

2.

3.

Signatures

Note: *The employee's signature is an acknowledgement of the completed review process and does not necessarily signify agreement with the supervisor's ratings or evaluation comments.

Employee signature*	Date:	Supervisor's signature	Date:
Additional signature	Date:		

Employee Comments (optional)

Portland Public Schools

Looking Forward – Setting Employee Performance Goals and Development Plans

The Non-Represented evaluation year runs from July-June. Completed evaluations are due by June 30. Goals and development plans should be completed by September. This tool is for the employee and supervisor. If you have any questions please contact your Human Resources Representative.

PART A: Setting Performance Goals

Performance Goals: What will be accomplished over the next twelve months?

Each position has key responsibilities for the next evaluation period. Once they have been established, list them here to be sure there is agreement on priorities. You may also want to describe responsibilities in terms of specific projects or goals that have been assigned. Throughout the year, you will check in on the status of the goals and may modify them after discussion.

Key responsibility/special assignment/goal	Plans to meet goals	How will the results be measured? (describe threshold indicator)

Career goals and aspirations

Based on the employee's current performance and interests, what possible roles and responsibilities is the employee interested in exploring? (Indicate role and/or responsibilities)

Part B: Development Plan

Based on the employee's identified development areas and interests - collaborate on a plan for development which will 1) increase the employee's effectiveness in the current position and/or 2) provide enrichment or preparation for a desired role.

Developmental Goal	Support required	Method to demonstrate skill	Target date for completion

PPS Core Competencies - Examples

Below are examples of what each competency might look like.

1. Integrity:
Is consistent, fair and ethical

Consistency & Fairness
Examples:

- Demonstrates integrity in making and honoring commitments.
- Is unbiased and takes action based on the merits of the situation.
- Applies standards and expectations consistently, is reliable and predictable.

Ethical
Examples:

- Behavior models high personal and professional standards.
- Ensures personal actions are consistent with PPS policies and procedures.
- Appropriately raises issues about improper conduct.
- Creates an environment where others can raise ethical concerns and openly work to resolve.
- Maintains all confidences and uses sensitive information appropriately.
- Encourages peers and subordinates to be discrete

2. Accountability:
Proactively sees the reality of a situation; assumes personal responsibility to find ways to address issues and reach results. Internally motivated to create positive outcomes.

Creating quality results
Examples:

- Holds self and others to high set of expectations.
- Assumes responsibility for own actions and results.
- Takes initiative and works independently. Delivers expected outcomes in timely way.
- When mistakes occur, focuses on solutions rather than blame.
- Able to prioritize work demands based on what is essential to overall department and organization success

Assuming responsibility for actions and outcomes
Examples:

- Accountable for actions and outcomes
- Takes ownership
- Finds solutions to roadblocks

Innovative problem solving and decision making
Examples:

- Able to see the whole system and understand how an individual piece affects the whole.
- Employs new insights and creative thinking to develop more effective processes and sustainable solutions.
- Identifies and involves stakeholders in problem solving and decisions.
- Uses data to analyze and support decision making.

3. Communication Effectiveness:
Demonstrates understanding for others' ideas and is able to create understanding for own thoughts using written and verbal methods. Uses communication approach appropriate for the situation. Is able to give and receive constructive feedback.

Transparency
Examples:

- Understands information needs of internal and external groups.
- Proactively shares appropriate information in light of the organizational and political realities of a situation.
- Creates clear channels for open, two-way communication.

Effective Written and Verbal Communication Skills
Examples:

- Conveys thoughts and ideas effectively with written and verbal communication.
- Listens to understand.
- Acknowledges and defuses emotion that clouds communication.
- Meets regularly with others to promote constructive communication.

Gives and receives feedback
Examples:

- Actively solicits and welcomes feedback from others.
- Gives feedback to others in manner that communicates respect for the individual, desire to improve the situation.
- Uses feedback to inform personal growth and development.

4. Collaboration and Teamwork:
Works collaboratively with others to achieve a shared goal. Works with colleagues to overcome barriers which may surface. Cooperates, using their interpersonal skills and providing constructive feedback. Able to address conflict constructively and respectfully.

Creates a positive, constructive work environment
Examples:

- Makes appropriate information and resources available to all team members.
- Identifies needs and volunteers assistance and support to others.
- Shows courtesy, sensitivity and respect for team members.
- Willing to explore different ways to work to make overall process better for everyone.

Partnership oriented
Examples:

- Willingly collaborates with others to accomplish common goals, shows commitment to teamwork.
- Shares skills and knowledge to promote development of others.
- Solicits others' opinions.
- Involves others in creating solutions to complex issues.
- Develops networks and builds alliances to get work done effectively across the organization.

Values Diversity
Examples:

- Open minded, welcomes diverse perspectives.
- Actively supports an inclusive environment.
- Treats all with fairness, dignity and respect.
- Tolerant and unbiased in interactions with others.

Effective conflict resolution
Examples:

- Addresses and resolve differences in a way that increases understanding of the issues
- Raises issues at an early stage.
- Owns their part of the situation and works to craft a solution that meets the needs of all involved.

5. Service Orientation:
Focuses on proactively meeting responsibilities in a way that meets the needs of the internal or external customer of those services. Willingly makes changes to improve services

Customer Service
Examples:

- Tenacious about finding solutions that will improve the customer's experience.
- Displays a can-do attitude and owns problems from beginning to end.
- Provides timely response, involves those who can most effectively address a situation. Demonstrates a sense of urgency in meeting the needs of others.
- Seeks to understand and anticipate needs.
- Friendly, approachable and courteous to all.

School and student focused:
Examples:

- Continually explores ways to improve the way work is performed, in order to better meet school and student needs.
- Understands how responsibilities and goals contribute to overall PPS mission and vision.
- Maintains a student- and school- centered approach to resolving issues.

Adaptable to changing environment
Examples:

- Demonstrates a high level of flexibility and resiliency.
- Operates effectively in an environment of shifting priorities.
- Maintains focus on bigger picture in the face of ambiguity and day to day changes.

Self Appraisal Worksheet

Evaluation Period From: To:	Employee's Name:	Department:

Part I: Looking Back - Performance Assessment

Part Ia: key position responsibilities

Consider your essential job functions and how your performed over the last review period:

1. What aspects of your responsibilities do you feel most confident in performing?
2. What aspects of your responsibilities did you find challenging?
3. What ideas do you have about ways to continue strengthening your performance?

Part Ib: goals and/or special projects

Consider the goals and or special projects you worked on over the last review period:

1. What results did you achieve?
2. What did you do that contributed to your level of success?

Part Ic: core competencies

Consider the PPS Core competencies: Integrity, Accountability, Communication Effectiveness, Collaboration & Teamwork, Service Orientation **(If you supervise others please include your additional competencies as a supervisor):**

1. Describe how you applied these competencies to your work and work relationships.
2. Which competencies do you feel most effective?
3. Which competencies would you like to expand your effectiveness?

Part II: Future Performance Expectations

Based on your achievements over the last review period, what do you feel would be areas to focus on to increase your effectiveness in your core responsibilities and in goals/special projects?

Part III: Future Training & Development

What training and development opportunities would be helpful to enhance your future performance?

Part IV: Organizational Support

Consider what you want for your career.
What suggestions do you have as to how your supervisor, co-workers, and/or District can support you in the present job and with future career goals?

Please submit this to your supervisor in advance of your performance review session so it can be part of the conversation.

PORTLAND PUBLIC SCHOOLS

Performance Management
Non-Represented Employees

Agenda

- Key Dates and Information
- Links and additional information
- System Walkthrough
- Completing a performance review: Do’s and Don'ts

Key Dates and Information

- SIGNED and SUBMITTED performance reviews due to HR by **June 30th**
- Sample Timeline

Date	Action
Now - May 24th	Employees complete self-assessments
Now - May 24th	Managers gathering information and drafting message
May 25th - June 7th	Complete reviews in PeopleSoft
Jun 7th - June 21st	Meet with employees to discuss performance review
By June 30th	Submit evaluation in PeopleSoft and send signed hardcopy to HR

- Non-represented employees, excluding building administrators, require a review
  - Hired on or before December 31, 2018
- Time period: Fiscal Years 2017/2018 & 2018/2019
  - If 2017/2018 complete – only 2018/2019 required

Contacts and Links

Technical support using PeopleSoft, hristeam@pps.net.

Process and content, Penny Robertson at probertson1@pps.net.

Web page: Home > Department > Human Resources > Manager Resources > Evaluation Resources

- Self Appraisal Worksheet
- Template Sample
- FAQ
- Core Competencies

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PeopleSoft System Training

https://hcmtest.pps.net/psp/HTEST/EMPLOYEE/HRMS/h/?tab=DEFAULT

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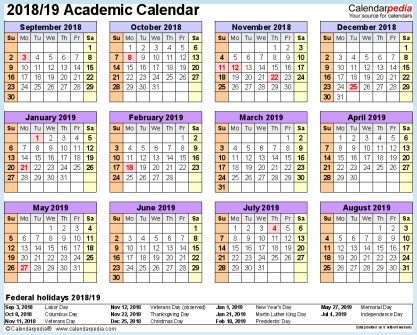
Do……

- Recognize contributions – “Job Well Done”
- Remember the review should be a discussion
- Respect the time and select an environment which supports the conversation
  - Your team member (and maybe you) will be nervous enough without environmental stresses or distractions
- Focus on job performance for the entire year
- Be prepared
- Be specific and use concrete examples to support your message



Don't……

- Bring up a performance issue for the first time unless you have to
  - Should have already been discussed .
- Discuss/criticize personality traits. You can discuss behaviors and results.
- Be vague. Regardless of the message, use clear language the employee can understand and process.
- Allow one action or a recent event to effect the entire review.
- Dominate the conversation. Provide space for the employee to share their assessment of their contributions.