pHCLE Study Group

Performance Excellence

Instructor: Jennifer Duvall

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Tell us what you think!

In the chat please share…

What is your biggest takeaway from participating in the pHCLE exam study sessions?

Study Session Outline:

- Introductions
- Preparing for the exam
- How I prepared…
- Checking for baseline understanding: Kahoot!
- Reviewing each quadrant:
  - pHCLE Standards
  - Instructor Examples
  - Q&A
- Overall Q&A

Study Session Purpose:

1. Gain strategies to prepare for your exam
2. Briefly review four areas of the standards
3. Learn from instructor examples
4. Highlight areas for additional preparation through practice test questions
5. Answer your questions about the exam

Preparing for your Exam

Reading Reference Guide

The pHCLE Reading Reference Guide is resource to help you engage in a self-study program for the certification exam. The guide defines key terms and provides links to suggested readings to help you further your learning. Topics are organized by the Human Capital Leaders in Education Professional Standards.
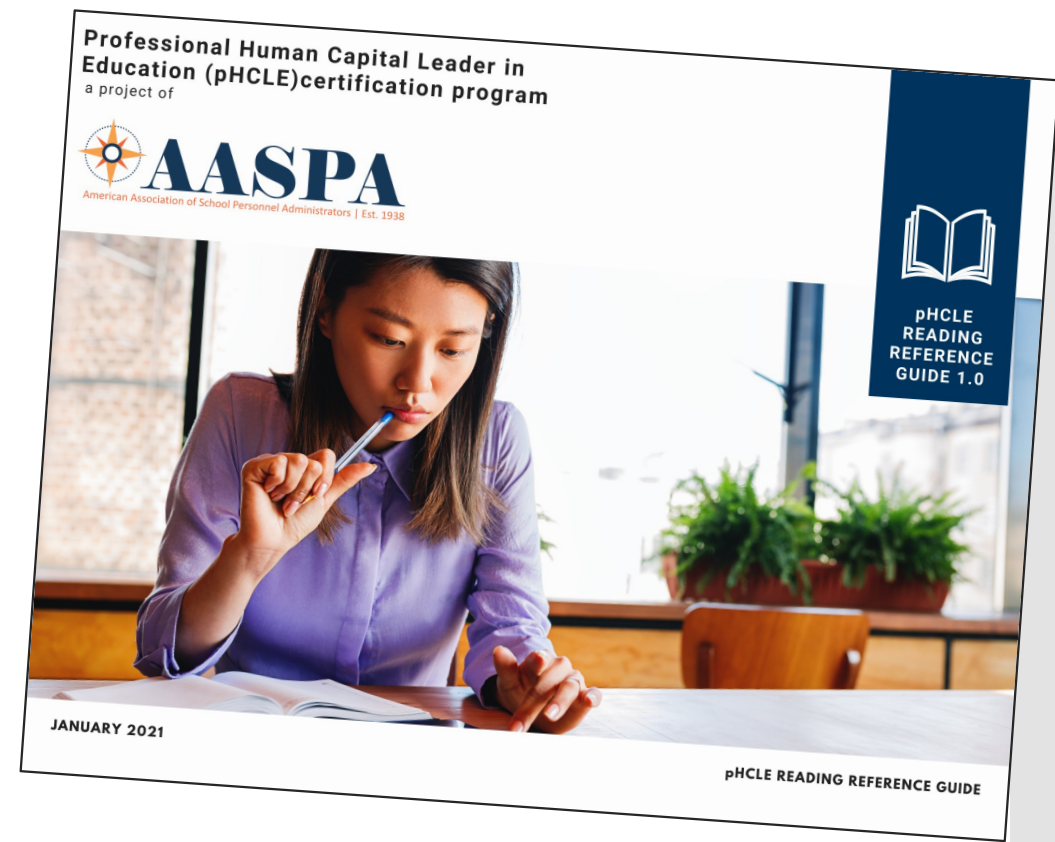
AASPA Recorded Webinars

AASPA offers recorded webinars as an additional resource for our members. Webinar topics are researched, created, and delivered by AASPA members. All webinars align with HCLE standards and some are eligible for HRCI or SHRM re-certification credit.

Study Sessions

These sessions will be recorded and accessible to review after the they are completed.

Other Professional Development Activities

Other growth and development activities such as reading HR books and articles, attending an HR conference, taking classes, etc. will help prepare individuals for the pHCLE exam.
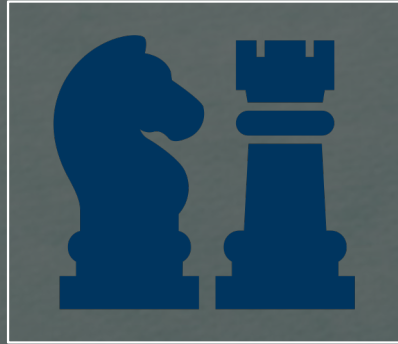
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pHCLE READING REFERENCE GUIDE 1.0

JANUARY 2021

pHCLE READING REFERENCE GUIDE

Webinar Title	Recording Date	HCLE Topic 1	HCLE Topic 2
Increasing Your Instructional Candidate Pool When Competition is High!	11/23/2020	Recruiting	Career Ladders
Teacher Internships as a Component of a Viable Teacher Recruitment Pipeline	11/17/2020	Recruiting	Career Ladders
Hire Top Talent Using Standards Based Interview Protocols	11/10/2020	Selection	
Developing a Mentoring Program for Education Support Professionals	7/2/2020	Continous Improvement	Onboarding
How to Engage Education Support Professionals in District-Wide Professional Development	6/30/2020	Strategic Alignment	Training & Development
The New Title IX: Unexpected Consequences for K-12 Labor and Employment	6/2/2020	Sustainability & Risk Management	
At the Top of Your Recruiting Game	4/8/2020	HR Branding	Recruitment
An HR Brand is Not Just a Logo, a Website or your Business Cards…It's an Experience	3/31/2020	HR Branding	Recruitment

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Jennifer's Study Recommendations

1. Participate in pHCLE learning sessions and read all suggested reading and coursework.

2. Attend AASPA conferences and state HR workshopss.

3. Put into practice HCLE areas in your district.

4. Present on various HCLE topics.

5. Review vocabulary.

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Performance Excellence

Strategic Alignment

Communications

pHCLE Exam Weight: 35%

Sustainability & Risk Management
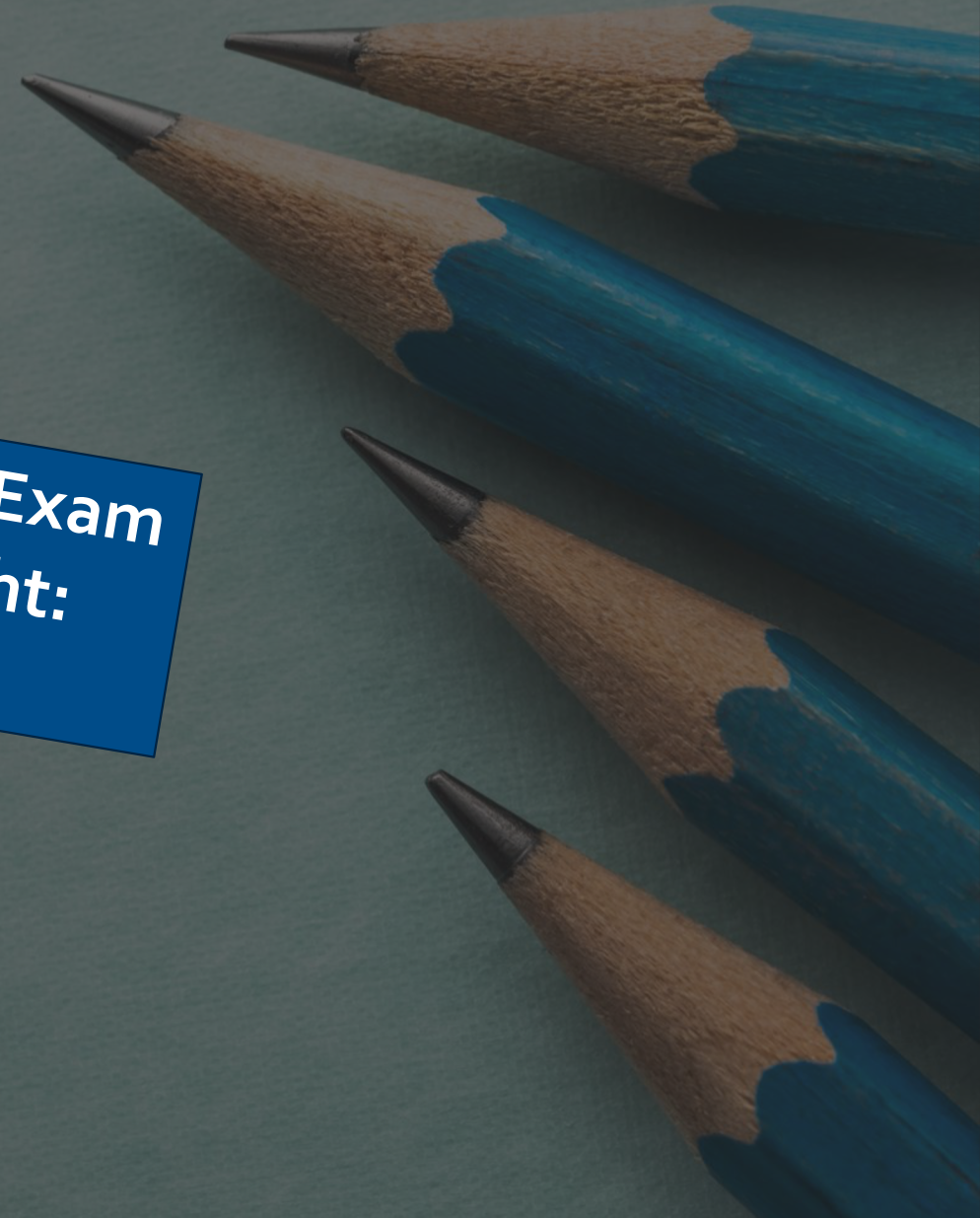
Continuous Improvement
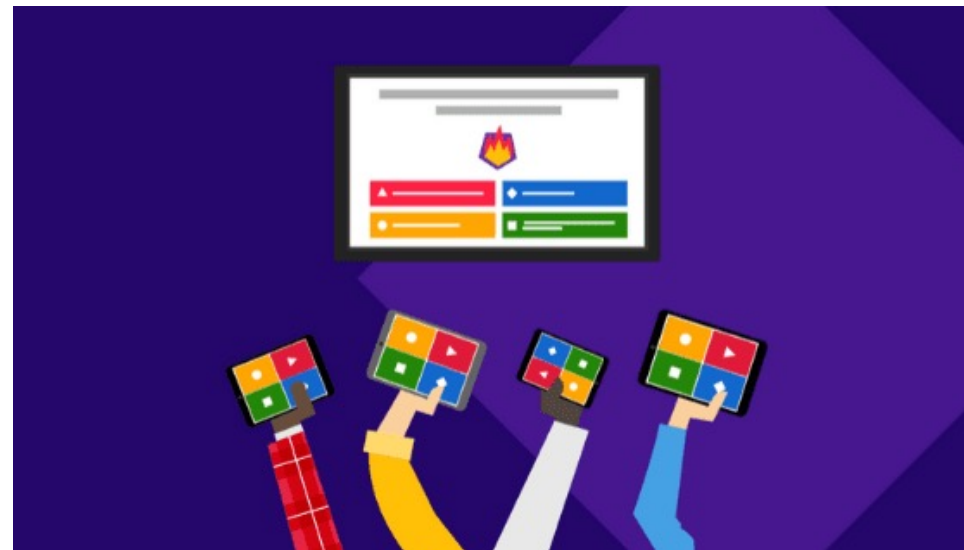
Strategic Alignment

The process of developing and connecting goals throughout an organization—of division, department, sub-department and individual—to focus all staff members on their contribution to overall organizational objectives.

Strategic Alignment

HCLE Standard	Content Outline	Terms & Definitions
P.SA.1 Develop an organizational strategy.	• Vision, Mission, Values, Goals • SWOT Analysis • PEST Analysis • Organization Structures (Focus on 3: Divisional, Functional, Matrix)	❑ **Mission:** Statement that describes how an organization will fulfill its vision. Typically, these statements include who the organization serves, who the organization is, and what the organization values. ❑ **Organization Structure:** The reporting structure developed to ensure an organization can meet its goals. Structure's outline and communicate the flow of information and work to an organization's staff. ❑ **Vision**: A statement regarding what the organization wishes to achieve or become. *See study guide for more terms and definitions.*
P.SA.2 Align the HCMS to the organizational strategy.	• Practices: Strategic, Transactional, Compliance-oriented	❑ **Strategic HR:** The management of human resources-related practices and processes in a proactive way that aligns to the long-term and short-term goals of the organization. This management philosophy tends to be more forward-thinking and future focused. ❑ **Transactional HR:** The process and practices that support the day-to-day activities of the human resources function. These practices tend to be more administrative and reactive. *See study guide for more terms and definitions.*
P.SA.3 Embed ethical principles across the organization	• Ethical dilemma • Decision making principles: Care-based, Ends-based, Rule-based • The four right-versus-right dilemmas	❑ **Ethics:** Attitudes and beliefs that guide the actions and decisions of organizations and individuals. ❑ **Ethical Dilemma:** A situation in which an individual or organization must make a decision when none of the options are clearly acceptable or ideal because they involve competing values. Also referred to as a right-vs-right dilemma. *See study guide for more terms and definitions.*

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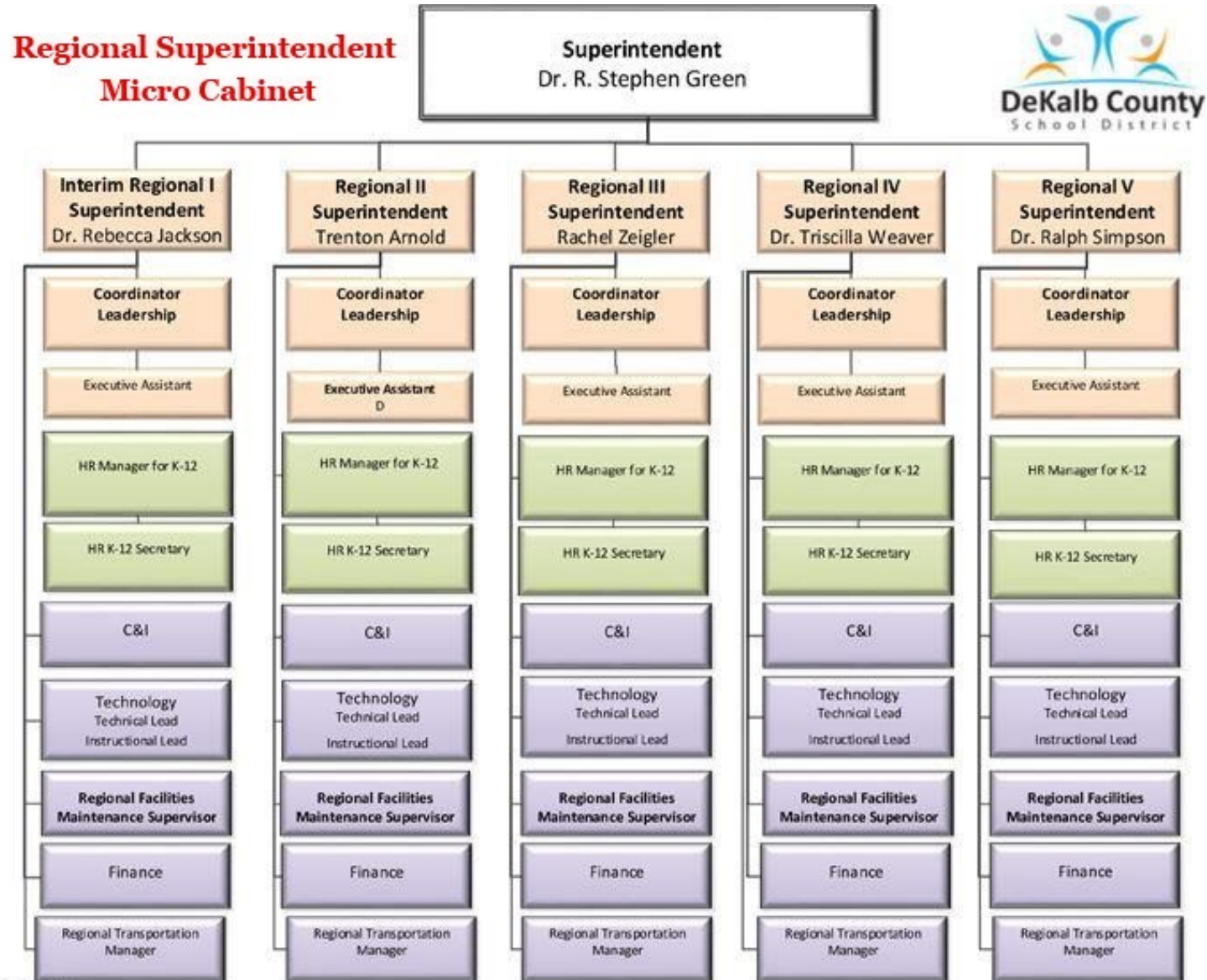
P.SA.1 Develop an organizational strategy.

Divisional Structure:

- When an organization is set up along geographies, projects, or services (sometimes called "divisions")

- Functional services are repeated under each geographic region or service.

Structure Pros: Geographic regions/service area set-up allows for targeted supports based on the needs of each group served.

Structure Cons: Decisions, actions, and processes can vary between regions/service areas; Repeated functions may not be effective use of funds

Example (Right): An organization chart from 2015-2016, DeKalb County School District (publicly available online)

P.SA.1 Develop an organizational strategy.

Functional Structure:
When an organization is set up along areas of service/ responsibility

Structure Pros:
Decisions, actions, and processes should be consistent (at least inter-function)

Structure Cons:
Possible siloing issues; No ability to provide differentiated geography, project, or service

2020-2021 Akron Public Schools Organization Chart
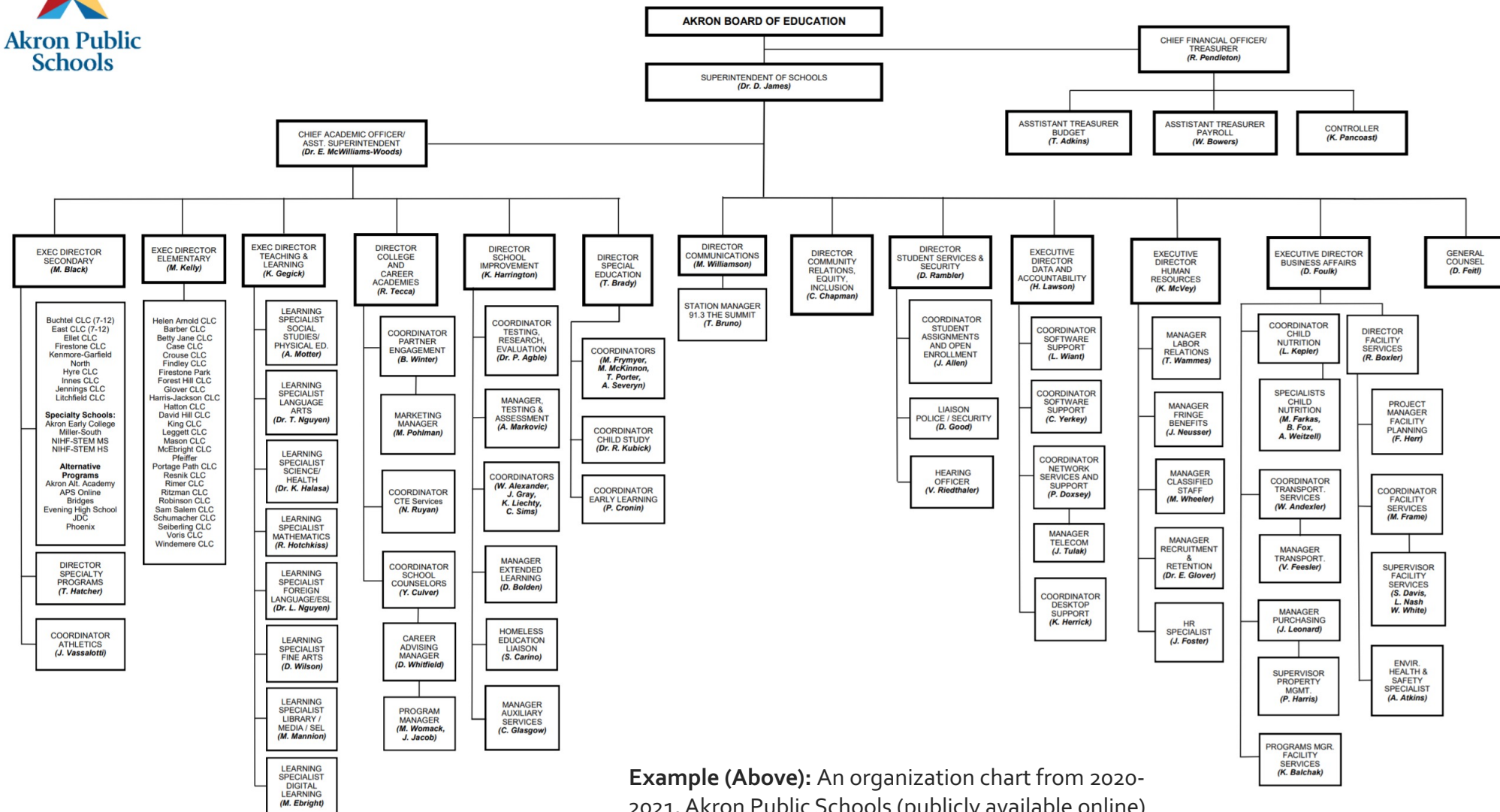
Example (Above): An organization chart from 2020-2021, Akron Public Schools (publicly available online)

P.SA.1 Develop an organizational strategy.

Matrix Structure:

- When an organization is set up along geographies/services ("divisions") AND by function

- Individuals are on a team where they provide their functional expertise focused on a specific geography, service, or project

Structure Pros: Allows for geographic regions/service area supports AND efficiency across functional areas

Structure Cons: Hard to manage and pull off as questions and confusion can arise regarding WHO my real boss is since everyone has two!
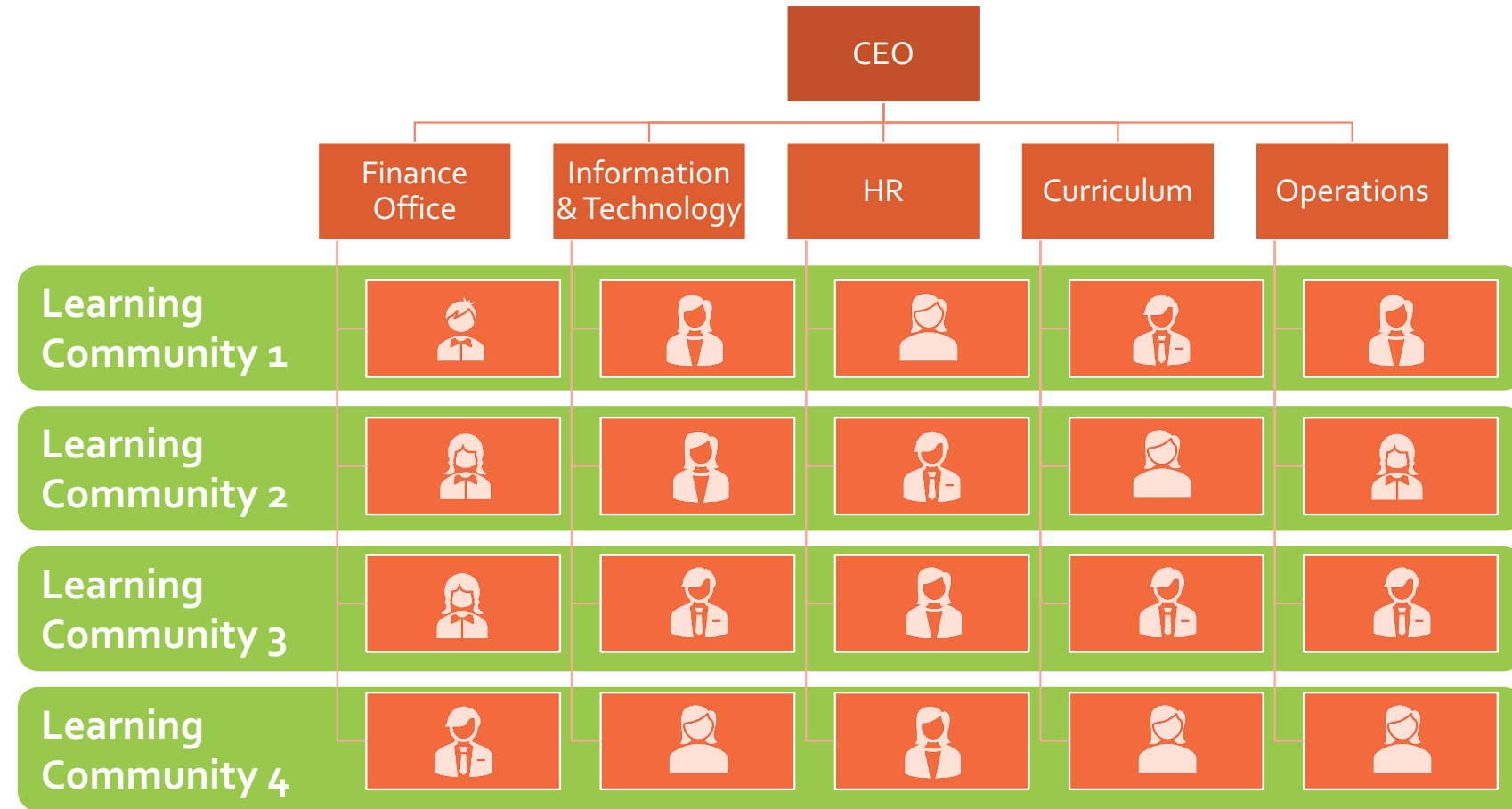
Example (Above): Fictional diagram drawing

P.SA.2 Align the HCMS to the organizational strategy.

Strategic HR

- Proactive
- Strategy-Aligned
- Data-driven
- Customer Focused
- Leadership

Transactional HR

- Reactive
- Compliance-focused
- Management

Strategic HR + Transactional HR → Comprehensive HCMS
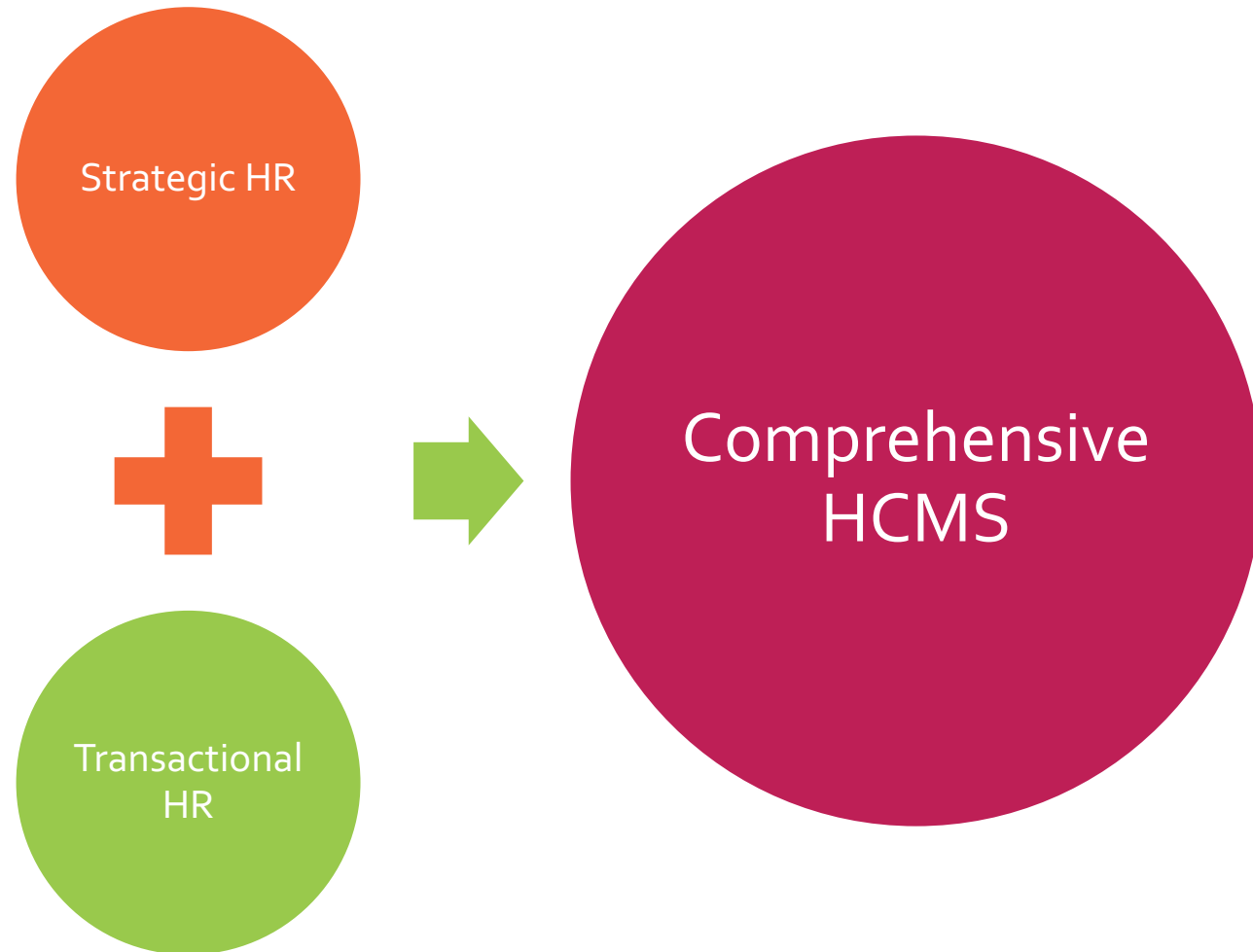
P.SA.3 Embed ethical principles across the organization.

Ethical paradigms: Types of ethical—or right vs. right—dilemmas

Ethical dilemma: A situation in which none of the decision options are clearly acceptable or ideal because they involve competing values.

TRUTH
Honesty, Adhering to facts.

VS

LOYALTY
Keeping promises, Maintaining allegiances

INDIVIDUAL
Interests of one or a few

VS

COMMUNITY
Interests of many or the majority

SHORT-TERM
Concern for the present

VS

LONG-TERM
Investment in the future

JUSTICE
Fair and equal application of rules

VS

MERCY
Compassion for the individual

Source: (Kidder, R. 1995)

Principles for Ethical Decision-Making

Evaluate options through the lens of all three principles and anticipate outcomes.

Ends-based Principle	Rule-based Principle	Care-based Principle
Impact	**Universal Standard**	**Empathy**
What would have the greatest good for the most people?	What if everyone were to behave that way?	How would you want to be treated in this situation?

Source: (Kidder, R. 1995)

Strategic Alignment

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Communications

The process of sharing of information through multiple channels to select audiences.

Communications

HCLE Standard	Content Outline	Terms & Definitions
P.CO.1 Use communications to ensure effective implementation of the HCMS.	• Communications plan components • Key messages • Implementation strategies • Stakeholders • Audiences • Communications channels • Know, Feel, Do approach	❑ **Communication Channel:** The means and methods through which organizations and people communicate. ❑ **Key Messages:** The selected strategic points of your communication that you want a primary audience to know and/or remember. ❑ **Primary Audience:** Individuals to whom the message is specifically directed. These are the individuals we are attempting to inform, teach, or change. ❑ **Secondary Audience:** Individuals who will be affected by your message but are not the intended recipients.

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The three main pieces of information your audience should walk away with:

- What do you want your audience to *know* and understand?

  ⟫ Key Messages, Content

- How do you want them to *feel*?

  ⟫ Word choice, Tone, Imaging, Context

- What do you want them to *do* with the information they have been presented?

  ⟫ Call to Action, Requests

Know?

- Educate
- Inform
- Illuminate
- Share

Feel?

- Inspire
- Perceive
- Impress
- Experience

Do?

- Motivate
- Invite
- Persuade
- Collaborate

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Audience

Primary Audience

Individuals to whom the message is specifically directed.

Attempting to inform, teach, or change.

Secondary Audience

Individuals who will be affected by your message but are not the intended recipients.

Example Audiences

Students

Teachers

Families

Administration

School Board

Community

Businesses

Higher Education

Internal & External Communications Channels

- There are many possible communication channels
- Communication channels should be picked to match what your audience uses
- Some channels are appropriate for internal audiences, some for external, others can be used for either or both audiences!

Internal

- Intranet
- Training
- Phone Calls
- Webinars
- Events
- Chat
- Videos
- Email Signatures
- Bulletin Boards

Website
Emails
Newsletters
Meetings
Events
Surveys
Chat
Videos
Employees
Social Media

External

- Internet
- Chat Bots
- Job Board
- Newspaper
- Advertisements
- Board Meetings
- Speaking Events
- Email Marketing
- Conferences
- Auto Calls
- Radio
- Blogs

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Sustainability & Risk Management

The process of proactively managing project or program risk to ensure success.

Sustainability & Risk Management

HCLE Standard	Content Outline	Terms & Definitions
P.SR.1 Apply knowledge of relevant law and regulations to education organizations.	• Every Student Succeeds Act (ESSA) • Federal employment laws • Equal Employment Opportunity Commission (EEOC) • Records retention and data privacy	**Employment Law:** Federal employment laws, case law, rules, guidelines, and enforcement agencies, as well as their implications for practice in human capital management such as: ❑ **Department of Labor Employment Laws** ❑ **Laws enforced by the EEOC** ❑ **Laws impacting education organizations** *See study guide for more terms and definitions.*
P.SR.2 Manage risk.	• Adverse impact & disparate treatment • Strategies for identifying and managing risk • Risk analysis • Feasibility analysis	❑ **Adverse Impact Analysis:** Also known as the 4/5ths or 80 percent rule, this analysis is used to assess disparate impact in employment practices (e.g., hiring, promotions) ❑ **Feasibility Analysis:** The following are four primary techniques for conducting feasibility analyses: 1) Total Cost Calculation; 2) Cost-Benefit Analysis; 3) Return on Investment; and 4) Break-Even Analysis. ❑ **Risk Analysis:** Evaluating 1) relative and 2) overall risk are two approaches to risk analysis. These reviews should be conducted by a team. *See study guide for more terms and definitions.*
P.SR.3 Develop sustainable human capital systems and services.	• Fixed costs • Variable costs • Types of sustainability	❑ **Fiscal Sustainability:** The ability of an organization to continue to fund (with cash) a project or program. ❑ **Programmatic Sustainability:** Having the support and resources needed to effectively manage a program and its activities. Involves attending to strategic alignment, staffing structures and responsibilities, culture, and the external environment. ❑ **Sustainability:** Ability to maintain programming or offerings and their benefits over time. *See study guide for more terms and definitions.*

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P.SR.1 Apply knowledge of relevant law and regulations to education organizations.

Be familiar with <u>federal</u> laws and court case impacting human capital management including…

- Employment laws enforced by the Department of Labor

- Equal Employment Opportunity laws enforced by the EEOC

- Laws impacting education organizations

P.SR.2 Manage risk.

A **Risk Matrix** can be used to assess relative risk:

Which potential risks have the greatest possibility of occurring?

Which risks could have the greatest negative impact?
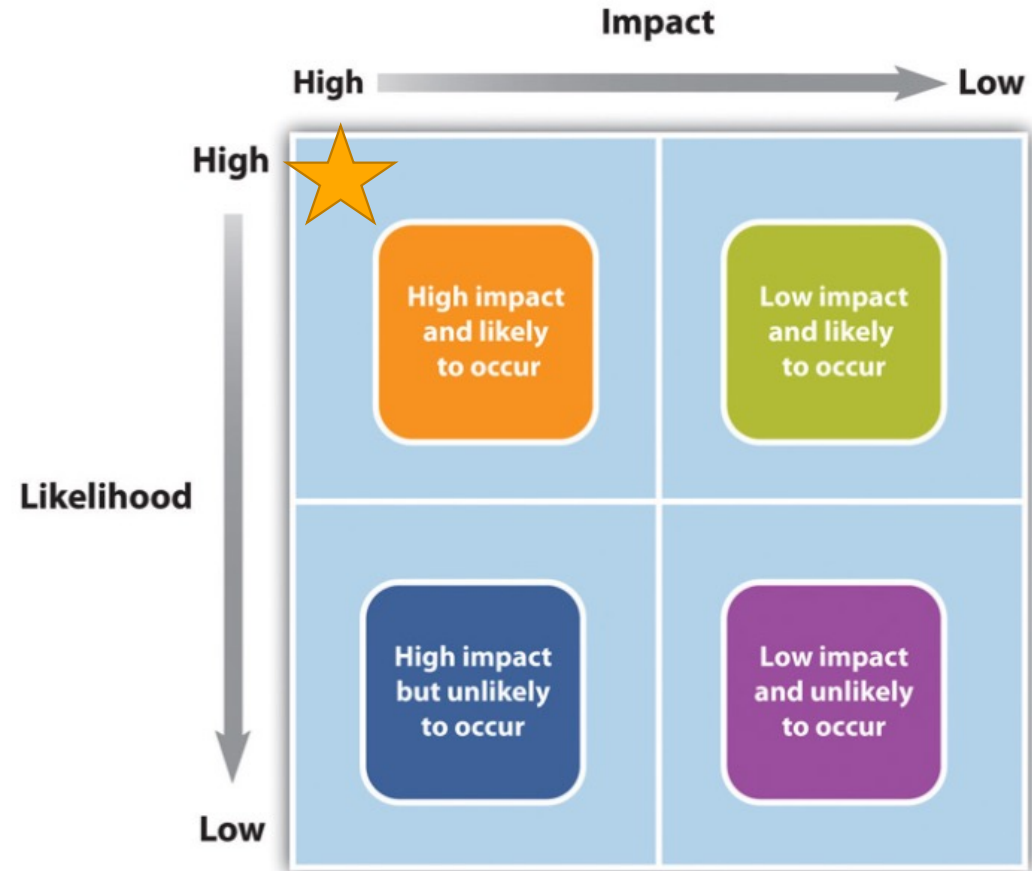
P.SR.2 Manage risk.

Situation: Setting a hard deadline for enrollment in TPS virtual academy.

Risks:

- Parents complain to Board

- Parents enroll student in another district or charter

- Student schedules are not complete in time

- Moving of current teaching staff to other

- Cannot staff appropriately across district

Which risks could have the greatest negative impact?

- All of them

Resolution: Communicate a deadline and it's importunate. Plan with available information. Continue to manage risk as the situation develops.
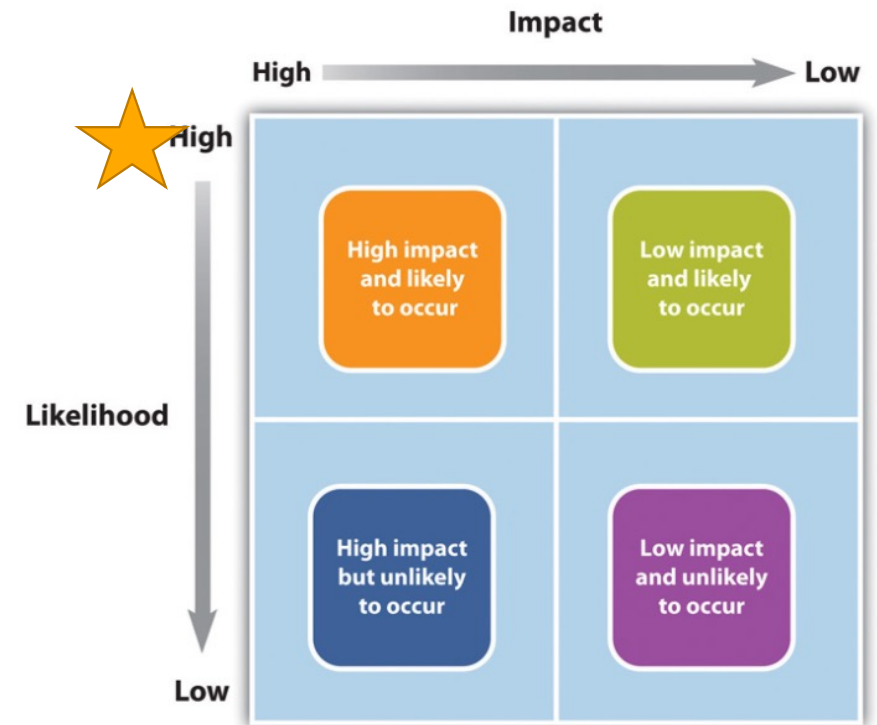
Risk Mitigation Strategies

Avoidance
Eliminating the cause of the risk. (e.g., ending program/practice or doing things differently)

Reduction
Establishing controls to reduce or prevent risk.

Sharing
Spreading out the risk by involving a partner to share responsibility

Segregation
Splitting the risk into different areas (e.g., separating critical functions of a process across more than one person or department, creating redundancies)

Transfer
Shifting risk to a third party (e.g., insurance, outsourcing)

P.SR.3 Develop sustainable human capital systems and services.

Fiscal sustainability: Feasibility analyses can help you assess whether to invest in or maintain a program.

Total Cost Calculation	Cost-Benefit Analysis	Return-on-Investment	Break-Even Analysis
Fixed costs + Variable costs	Benefits – Costs	$\frac{\text{Benefits} - \text{Costs}}{\text{Costs}}$	$\frac{\text{Fixed costs}}{\text{Savings or revenue per unit}}$
What are the total costs to operate a program?	Do the financial benefits exceed the costs?	How efficient or profitable is a program?	What quantity produces zero losses/profits?

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ROI: Wellness Costs Calculation

A district decides to invest $140,000 in a more comprehensive wellness program in response to staff requests. They select a variety of programs, supports, and resources with the overall goal reducing health care costs by encouraging employees to be proactive and more involved in the management of their mental and physical health.

Wellness Investment Result:

- Reduced the number of sick days used by employees and substitutes required to cover work:
  Savings - $145,000

- Managed/reduced disability claims:
  Savings - $25,000

- Reduced health care insurance costs: **Savings - $100,000**

Total Cost: $140,000; **Total Benefit:** $270,000
Using the formula: ($270,000 - $140,000)/ $140,000 = 92.9%
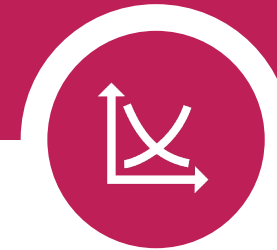**What does this mean?** For every dollar you spend, the *Return on Investment* is approximately 93 cents

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Return-on-Investment

$$\frac{(\text{Benefits} - \text{Costs})}{\text{Costs}}$$

How efficient or profitable is a program?

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Sustainability & Risk Management

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Continuous Improvement

Working to define, analyze, and improve your processes.

Continuous Improvement

HCLE Standard	Content Outline	Terms & Definitions
P.CI.1 Serve internal and external customers.	• Internal customers • External customers • Customer service • Customer focus	❑ **Customer Experience:** How customers perceive their interactions with your organization or department. ❑ **Customer Focus:** An orientation toward meeting your customers' needs. ❑ **Customer Service:** Assistance or advice provided to users of product or service. ❑ **External Customers:** Outside organizations and individuals who are not employed by the organization providing them the service, materials, or information. ❑ **Internal Customers:** A department, team, or individual who receives services, materials, or information from someone else in the same organization.
P.CI.2 Evaluate the HCMS.	• Identifying, mapping, and measuring processes • COPIS • Input/Process/Output measures • Leading/Lagging indicators	❑ **Process:** A defined sequence of repeatable actions intended to produce a desired outcome. ❑ **Performance Measurement:** Regular collection of data to assess whether processes are being performed correctly and efficiently and the desired results are being achieved (Hatry, 2006). ❑ **Process Map:** A representation of how a process functions at a specific time. Process maps can be drawn to represent either the current state or a desired future state. Three primary tools used for process mapping are COPIS, flow charts, and swim lane diagrams. *See study guide for more terms and definitions.*
P.CI.3 Improve the HCMS.	• Valid and reliable measures • Identifying systemic bias • Root cause analysis • Monitoring performance	❑ **Reliability:** The extent to which a data collection procedure yields consistent results on repeated trials. Also referred to as precision. ❑ **Root Cause Analysis:** Tools used to uncover main causes of an issue. Examples include the fishbone diagram and 5 whys process. ❑ **Validity:** The extent to which a data collection procedure measures what it is supposed to measure. Also referred to as accuracy. *See study guide for more terms and definitions.*

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Continuous Improvement

01 Define

Define needs.
Customer experience, Employee experience,
Strategic Alignment.

02 Analyze

Analyze the current state.
Process mapping, Valid and reliable measures

03 Improve

Improve to achieve desired future state.
Root cause analysis, Identify waste, Monitor progress

01
DEFINE

03
IMPROVE

02
ANALYZE
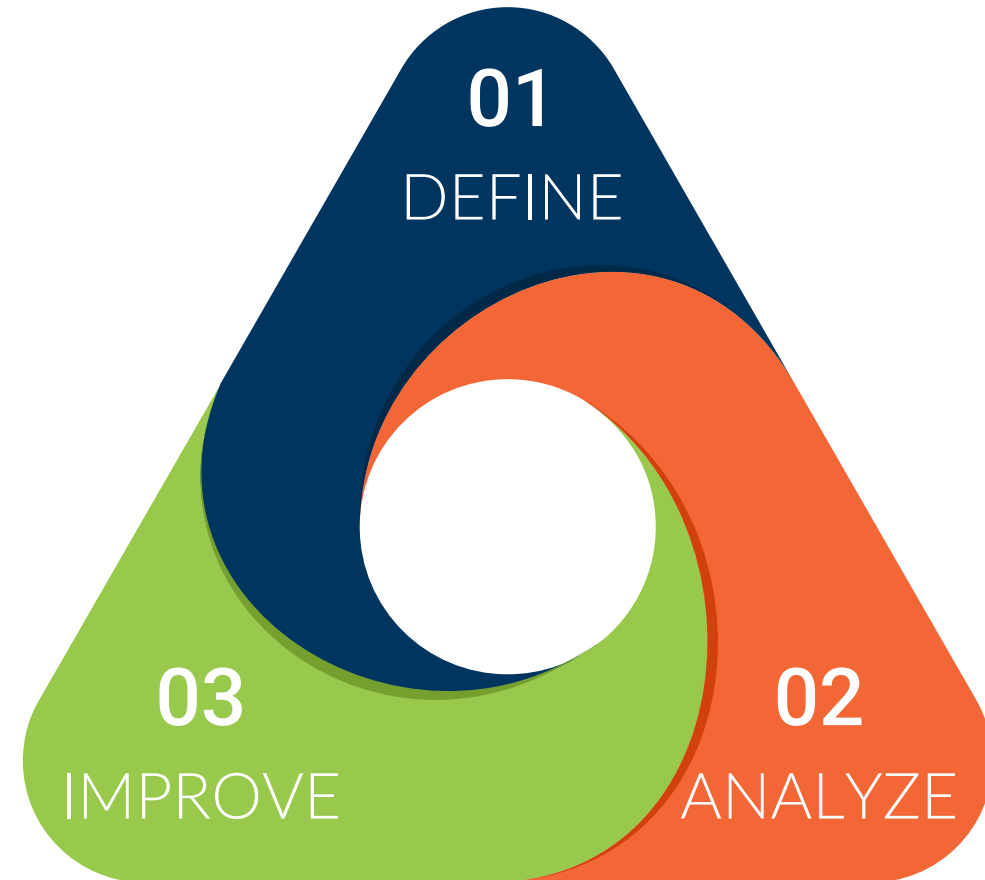
3 Main Types of Process Maps

- **COPIS:** Provides a high-level view of the key elements of a process (Customers, Outputs, Process, Inputs, Suppliers). Starting point for creating more detailed process maps.

- **Flow Chart:** Provides a visual understanding of a process. Shows detailed process steps in chronological order.

- **Swimlane Diagram:** Depicts the functions or roles involved in a process. Each role occupies a lane of the diagram.

Common Process Mapping Symbols
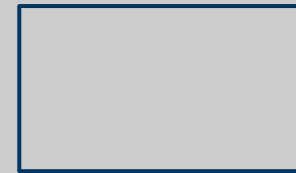
Process
Represents a step or activity in the process
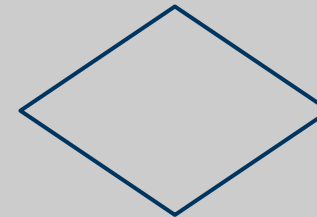
Decision
Represents where a decision is made

Connector
Shows the flow or direction of the process

START
END
Terminator
Signifies the beginning or endpoint of a process

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TPS Example: Swimlane Diagram

Pre-screening Process for External Applicants
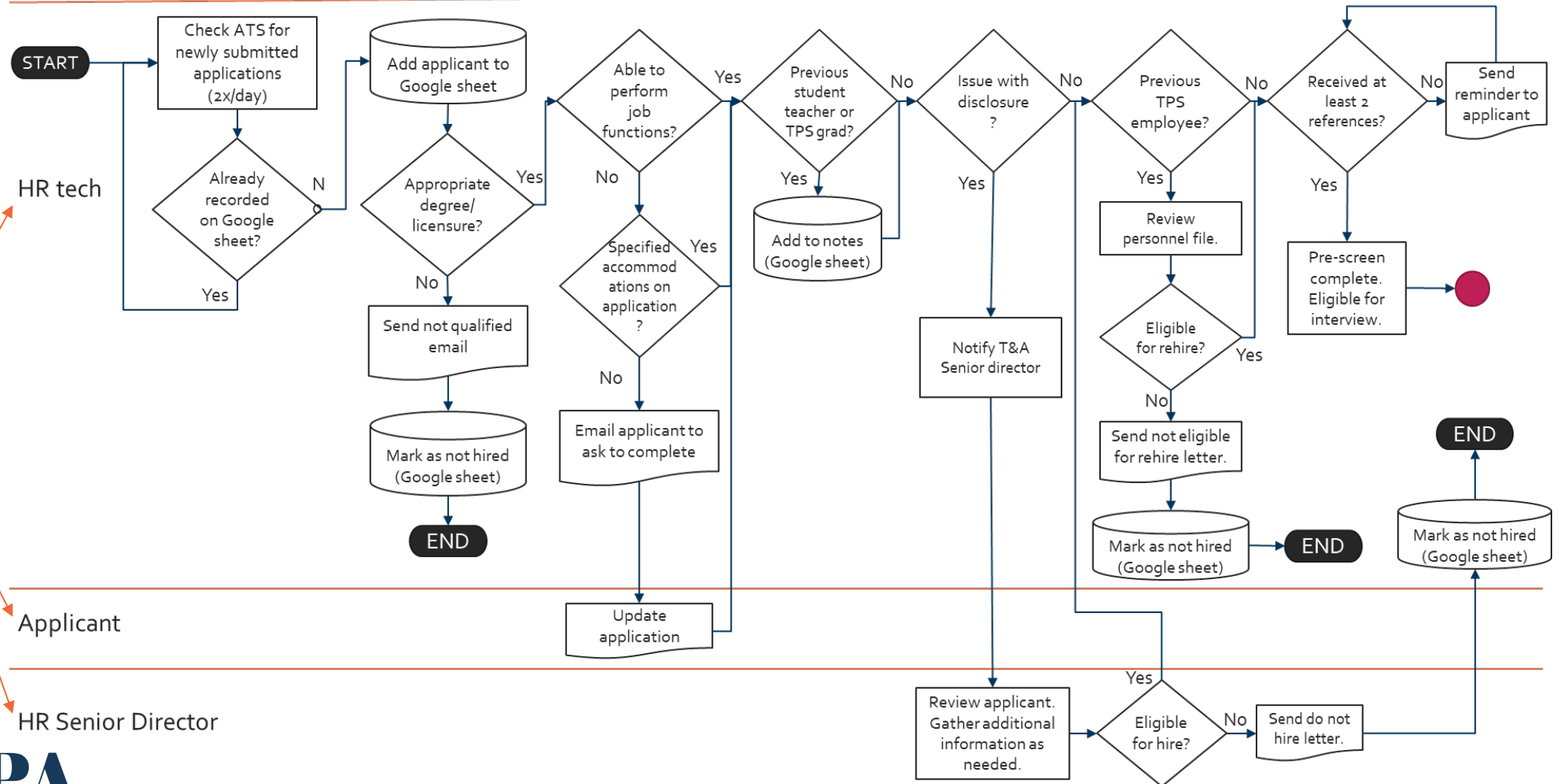
P.CI.2 Evaluate the HCMS.

- **Reliability-** Consistency; Ability of a process or measure to obtain the same results on repeated attempts

- **Validity-** Accuracy; Extent to which a measure assesses the outcome it is supposed to measure.

Metrics and Data Management

Scorecard:
- Data display that contains metrics and data that is collected and reported (typically) quarterly or annually
- Considered to be a performance management tool with metrics aligned to a strategic plan goals

TPS PROUD — TOLEDO PUBLIC SCHOOLS

Strategic Plan - Toledo Public Schools (tps.org)

Board Monitoring System (BMS) Results - 3rd Year Measures

Goal 1: INCREASE STUDENT ACHIEVEMENT AND GROWTH

Year	2015-2016	2016-2017	2017-2018	2018-2019 Target
Metric				
Average annual High School attendance rate	90.1%	92.8	92.1	93
Average annual Elementary School attendance rate	94.0%	86.70%	92%	94%

GOAL 3: PROVIDE A MENTALLY AND PHYSICALLY SAFE ENVIRONMENT TO STUDENTS, STAFF, AND STAKEHOLDERS

Year	2015-2016	2016-2017	2017-2018	2018-2019 Target
Truancy rate (average number of unexcused absences per year)	768,179	806,081	893,283	850,000
Bullying/harassment incidents per 100 students	99	41.1	36	25
Arrests per 100 students	130	120	130	120

GOAL 4: ATTRACT AND RETAIN HIGHLY SKILLED AND HIGHLY PERFORMING STAFF TO ENSURE DISTRICT SUCCESS

Year	2015-2016	2016-2017	2017-2018	2018-2019 Target
% of employees that complete their first year successfully based on programs in place (Intern program, TAAP Mentor Program, AFSCME Programs)	96%	96%	89%	90%
% of classroom teaching positions vacant on the first day of school	4.00%	4.60%	3.10%	3.00%
% of minority teachers hired	----	----	15.58%	18%
% of teachers rated a 3 or higher on OTES	95.0%	90.00%	91%	94%
# of grievances	48	299	49	<49

Dashboard:
- Data display that contains metrics and data that are typically up-to-date or real-time
- Considered to be data visualization tool with metrics on topics important to the user

The School District of PALM BEACH COUNTY

COVID-19 Dashboard - The School District of Palm Beach County (palmbeachschools.org)

COVID-19 DASHBOARD — The School District of Palm Beach County

Total confirmed cases are cumulative, recorded since September 16, 2020

- 2641 Total Confirmed Cases
- 1094 Employees
- 1547 Students

Employee and Student Confirmed Cases by Date

Schools/Facilities	Employees	Students
Acreage Pines Elementary	6	6
Addison Mizner Elementary	5	7
Adult & Community Education		
Adult Education Center	2	3
Alexander W. Dreyfoos Jr. School of the Arts	1	20
Allamanda Elementary	5	9
Atlantic Community High	2	
Bak Middle School of the Arts	4	10
Banyan Creek Elementary	5	7
Barton Elementary	11	
Beacon Cove Intermediate	2	7
Bear Lakes Middle	2	4
Belle Glade Elementary	6	13
Belvedere Elementary	2	1
Benoist Farms Elementary		5
Berkshire Elementary	3	11
Binks Forest Elementary	9	11
Boca Raton Community High School	9	44
Boca Raton Community Middle	4	28
Boca Raton Community MS - Adult		2
Boca Raton Elementary		5
Boynton Beach Community High	12	4
Building Code Services		
Calusa Elementary	6	21
Carver Community Middle	5	7
Cholee Lake Elementary	6	6
Christa McAuliffe Middle	3	9
Citrus Cove Elementary	5	12
Clifford O. Taylor/Kirklane Elementary	16	27

School Name: All   Region: All   School Level: All

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P.CI.3 Improve the HCMS.

Process Improvement Approaches

Eliminate Waste
Actions that don't create value for your customers

- **Defects** — Errors. Failing to meet customer expectations
- **Overproduction** — Making more than is needed
- **Waiting** — Time wasted waiting for process step to be completed
- **Inventory** — Excess materials
- **Neglected Talent** — Underutilizing skills and abilities
- **Motion** — Unnecessary people movement
- **Transportation** — Unnecessary movement of objects
- **Excess Processing** — Extra reviews, more work, or higher quality than required

Root Cause Analysis
Uncover the main causes of issues.

- **Fishbone Diagram** — Used to brainstorm & categorize causes.
- **5-Whys Analysis** — Iterative questioning process to get to causes

Eliminate Bias
Stereotypes in favor or against a person or group

- **Halo/Horn Effect** — Allowing good or bad trait to overshadow others
- **Primacy/Recency Bias** — Focusing on first impressions/most recent information
- **Central Tendency Bias** — Tendency to rate everyone in the middle of the scale
- **Similar-to-Me Effect** — Preference for those with a similar background, interests
- **Extreme Responding Bias** — Tendency to give very high or very low ratings

Note: See readings for additional types of bias.

5 Why's Example – TPS Principal Shortage Issue

ISSUE: *District has a shortage of highly performing principals.*

WHY #1?	TPS losing 3-5 highly performing principals a year	TPS was only getting 1 to 3 candidates for principal positions

WHY #2? Postings for principal jobs in neighboring districts are $20-$30k higher in base pay

WHY #3? TPS base is low.

WHY #4? The district also offers longevity, supplemental, hourly and additional duties pay which does not appear in advertised base.
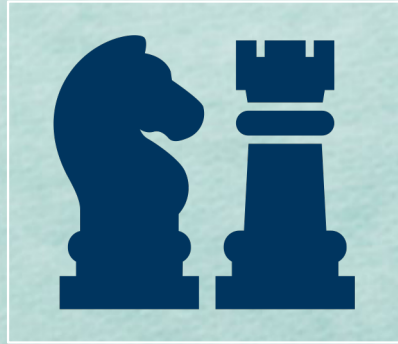
WHY #5? This was done due to community and union scrutiny of administrator pay

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Continuous Improvement

HCLE Standard	Content Outline	Terms & Definitions
P.CI.1 Serve internal and external customers.	• Internal customers • External customers • Customer service • Customer focus	❑ **Customer Experience:** How customers perceive their interactions with your organization or department. ❑ **Customer Focus:** An orientation toward meeting your customers' needs. ❑ **Customer Service:** Assistance or advice provided to users of product or service. ❑ **External Customers:** Outside organizations and individuals who are not employed by the organization providing them the service, materials, or information. ❑ **Internal Customers:** A department, team, or individual who receives services, materials, or information from someone else in the same organization.
P.CI.2 Evaluate the HCMS.	• Identifying, mapping, and measuring processes • COPIS • Input/Process/Output measures • Leading/Lagging indicators	❑ **Process:** A defined sequence of repeatable actions intended to produce a desired outcome. ❑ **Performance Measurement:** Regular collection of data to assess whether processes are being performed correctly and efficiently and the desired results are being achieved (Hatry, 2006). ❑ **Process Map:** A representation of how a process functions at a specific time. Process maps can be drawn to represent either the current state or a desired future state. Three primary tools used for process mapping are COPIS, flow charts, and swim lane diagrams. *See study guide for more terms and definitions.*
P.CI.3 Improve the HCMS.	• Valid and reliable measures • Identifying systemic bias • Root cause analysis • Monitoring performance	❑ **Reliability:** The extent to which a data collection procedure yields consistent results on repeated trials. Also referred to as precision. ❑ **Root Cause Analysis:** Tools used to uncover main causes of an issue. Examples include the fishbone diagram and 5 whys process. ❑ **Validity:** The extent to which a data collection procedure measures what it is supposed to measure. Also referred to as accuracy. *See study guide for more terms and definitions.*

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Performance Excellence

Strategic Alignment

Communications

pHCLE Exam Weight:
35%

Sustainability & Risk Management

Continuous Improvement