Professional Human Capital Leader in Education (pHCLE)certification program

a project of

AASPA

American Association of School Personnel Administrators | Est. 1938

Great teachers and leaders play a critical role in preparing students for success in the future. As Human Capital Leaders, it is our duty to provide every student with equitable access to educators who can help them develop skills to respond to challenges in college, careers, and life.

pHCLE OVERVIEW

The Professional Human Capital Leader in Education (pHCLE) certification program is rooted in professional standards that outline the competencies that human capital leaders should master. The HCLE standards, designed specifically for Pre-K–12 education, were informed by feedback from hundreds of educators from across the country, including AASPA and its state affiliates.

READING REFERENCE GUIDE OBJECTIVE

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. This guide is meant to supplement other professional development activities.

NOTE ON USE

This document contains research, guidance, and information, and is the property of the American Association of School Personnel Administrators. It is for use by the individual who purchased access to study group sessions and is not to be copied, quoted, published, or shared. We ask that this document be safeguarded, allowing no physical or electronic duplication. No changes may be made to this document without the express written permission of the American Association of School Personnel Administrators.

AASPA WEBINARS

AASPA offers recorded webinars as an additional resource for our members. Webinars 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.

AASPA Webinars that support your pHCLE preperation

A full list of aligned webinars can be found at https://www.aaspa.org/phcle-reference-guide-edmkcjamhw-3083896

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

JANUARY 2021

**pHCLE
READING
REFERENCE
GUIDE 1.0**

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Strategic Alignment

HCLE Standard	Content Outline	Terms & Definitions	Reading
P.SA.1 Develop an organizational strategy	• Organization strategy • Strategic Plan • Vision • Mission • Values • Goals • Outcomes • Alignment • SWOT • PEST • Organization Structures (Focus on 3: Divisional, Functional, Matrix) • Decision making models (Centralized and Decentralized)	• **Centralized decision-making:** A decision-making model and leadership structure where decisions are made by leaders at the top of an organization or at the central/main office, rather than disbursed across the organization and/or other sites/buildings. In this structure, power sits with a limited few. • **Decentralized decision-making:** A decision-making model and leadership structure where decisions are made by leaders across the organization, rather than by leaders/sites at the top. In this organization power is delegated across leaders in varying divisions, functions, or sites. • **Divisional structure:** An organization structure in which employees are assigned to a division that contains all organization functions (such as transportation, finance, curriculum and assessment, etc.). Divisions typically exist to serve a specific customer, focus on a strategic initiative or organization-wide project, or geographic area. Divisions are run and managed by an executive leader and tend to be more autonomous. In PK12 education, divisions are often seen when very large districts are split into geographic regions (i.e., east and west) or when a district has a leader of Early Childhood Programs, K-5, and another of 6-12. • **Functional structure:** An organization structure in which employees are assigned to a department or function such as transportation, finance, curriculum and assessment, etc. The individuals in a department all work on related tasks, projects, or outcomes. • **Goal:** A desired outcome. • **Matrix Structure:** An organization structure in which employees are assigned to both a functional area as well as a division or team. In this situation employees could report to two individuals – one in their department and one in their function. • **Mission**: Statement that describes how an organization will fulfill its vision. Typically, these statements include <u>who</u> the organization serves, <u>who</u> the organization is, and what the organization <u>values</u>. • **Organizational Strategy:** Actions and tactics that are organized to ensure an organization fulfills its vision, mission, values, and goals. • **Organization Structure:** The reporting structure developed to ensure an organization can meet its goals. Structures outline and communicate the flow of information and work to an organization's staff.	Organization structures & Decision-making models: • Point Park University. (2018.) <u>4 Types of Organization Structures</u>. (Reading time: 6 minutes) • University of Minnesota. (n.d.) <u>7.3 Organizational Structure.</u> (Reading time: 12.5 minutes) Mission, vision, values, goals, and objectives: • University of Minnesota. (n.d.) <u>4.3 The Roles of Mission, Vision, and Values</u>. (Reading time: 6 minutes) • University of Minnesota. (n.d.) <u>6.3 The Nature of Goals and Objectives.</u> (Reading time: 7 minutes) SWOT Analysis: • Renault, V. (n.d.) <u>Section 14. SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats.</u> University of Kansas. (Reading time: 10 minutes) PEST Analysis: • MindTools. <u>PEST Analysis: Identifying "Big Picture" Opportunities and Threats.</u> (Reading time: 9 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		• **PEST Analysis**: An analysis tool or protocol for analyzing Political, Environmental, Sociocultural, and Technical factors. Reviewing these external factors enables organizations to assess their influence on processes, projects, or initiatives. • **Strategy**: A plan or method that enables an organization to achieve its long-term goals. • **SWOT Analysis**: An analysis tool or protocol for analyzing Strengths, Weaknesses, Opportunities, and Threats for a process, project, or initiative. It supports planning, development, and decision-making efforts. It is important to remember that Strengths and Weakness are meant to be about the organization *internally* while Opportunities and Threats examine factors (e.g., peoples, practices, environment) *external* to the organization. • **Values:** Behaviors, beliefs, actions, knowledge, skills, or abilities the organization values above all others. • **Vision:** A statement regarding what the organization wishes to achieve or become.	
P.SA.2 Align the human capital management system (HCMS) to the organizational strategy	• Practices: Strategic, Transactional, Compliance-oriented • Human Capital Management System (HCMS) • Aligning organization goals with HCMS	• **Capital:** A term that is used to refer to an asset. Organizations can choose to invest in an asset as they believe it bring the organization value. • **Compliance-oriented:** Work that focuses meeting the requirements or demands of rules, orders, contractual agreements, regulations, laws, legislation, etc. • **Human Capital Leader**: Anyone in an organization who hires, grows, leads, or evaluates staff. • **Human Capital Management:** A system by which organizations make and implement "human capital decisions, such as decisions on preparation, recruitment, hiring, placement, retention, dismissal, compensation, professional development, tenure, and promotion." (ESSA definition) • **Resource:** "A source of supply or support: an available means —usually used in plural; a natural source of wealth or revenue —often used in plural; a natural feature or phenomenon that enhances the quality of human life." (Merriam Webster) • **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 HR**: The management of human resources-related practices and processes in a proactive way that aligns to the long-term and short-	HCMS: • Elementary and Secondary Education Act of 1965, As Amended Through P.L. 114–95. (2016). (Read HCMS definition in Section 2211 on PDF document page 174. Reading time: 1 minute.) Strategic HCMS: • Douglas, E. (2011). New (Strategic) Face of HR. *EducationWeek*. (Reading time: 3 minutes) • Odden, A. (2011). Manage 'Human Capital' Strategically. *EducationWeek*. (Reading time: 15 min) • Konoske-Graf, A., Partelow, L., & Benner, M. (2016). To Attract Great Teachers, School Districts Must Improve Their Human Capital Systems. Center for American Progress.

HCLE Standard	Content Outline	Terms & Definitions	Reading
		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. Often people identify activities such as revising workplace policies, benefits enrollment, and the processes of paperwork to be examples of transactional activities.	• Douglas, E., Heynoski, K. & Bagshaw, T. (2018). Beyond Human Resources. *School Administrator.* (Reading time: 9 minutes)
P.SA.3 Embed ethical principles across the organization	• Ethics • Ethical dilemma • Decision making principles: Care-based, Ends-based, Rule-based • The four right-versus-right Dilemmas: (1) Individual vs. Community, (2) Truth vs. Loyalty, (3) Short Term vs. Long Term, and (4) Justice vs. Mercy	• **Care-based Principle:** A decision-making process rooted in empathy in which you consider how you would want to be treated in that situation. • **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. • **Ends-based Principle:** A decision-making process that attempts to select an outcome that results the most good for largest number of people possible. • **Ethics:** Attitudes and beliefs that guide the actions and decisions of organizations and individuals. • **Right-vs-Right Dilemma:** Situations which require decisions to be made between two paths that can both be justified or seen as the "right" way. Typically fall into four categories: (1) Individual vs. Community, (2) Truth vs. Loyalty, (3) Short Term vs. Long Term, and (4) Justice vs. Mercy. • **Right-vs-Wrong Dilemmas:** Situations which require decision between a "right" or moral choice and a "wrong" or unethical choice. These dilemmas often involve circumstances in which one choice would create a personal advantage for yourself while disadvantaging others. • **Rule-based Principle**: A decision-making process that considers the impact a decision would have if it became a universal standard and everyone were to act or behave in a similar way.	• Resolution Principles. (n.d.). *The Primes.* (Reading time: 1.5 minutes, Video 2:42 minutes) • Right vs. Right. (n.d.). *The Primes.* (Reading time: 1.5 minutes, Video: 3:28 minutes) • Kidder, R. (2004). Right Versus Right: Resolving Our Toughest Dilemmas. *AASA Spotlight.* (Reading time: 2 minutes)

Communications

HCLE Standard	Content Outline	Terms & Definitions	Reading
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.	• School Communications Planning Guide. (n.d.) *CampusSuite*. (Reading time: 12 minutes) • Sullivan, D. (2020). Use the 'Know, Feel, Do' content structure for maximum impact. *BetterMarketing*. (Reading time: 6 minutes) • Mastering Public Relations: "Chapter 7: Identifying and Prioritizing Stakeholders and Publics (Only section 7.1 and 7.2, Reading time: 6 minutes)

Sustainability & Risk Management

HCLE Standard	Content Outline	Terms & Definitions	Reading

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
		  I. Wages and Hours Worked
		    o Minimum Wage and Overtime Pay - Fair Labor Standards Act
		    o Wage Garnishment - Consumer Credit Protection Act
		    o Child Labor Protections (Nonagricultural Work) - Fair Labor Standards Act - Child Labor Provisions
		    o Workers with Disabilities for the Work Being Performed - Fair Labor Standards Act - Section 14(c)
		  II. Safety and Health Standards
		    o Occupational Safety and Health Act
		  III. Health Benefits, Retirement Standards, and Workers' Compensation
		    o Employee Benefit Plans - Employee Retirement Income Security Act
		    o Continuation of Health Coverage – Consolidated Omnibus Budget Reconciliation Act (COBRA)
		    o Family and Medical Leave Act (FMLA)- Provides unpaid leave for up to 12 weeks for medical issues. The U.S. has no federally required paid time off.
		    o Patient Protection and Affordable Care Act (PPACA)
			• Skinner, R. (2019). The Elementary and Secondary Education Act (ESEA), as Amended by the Every Student Succeeds Act (ESSA): A Primer. Congressional Research Service. (Only page 1 summary, Reading time: 3 minutes)
			• U.S. Department of Education. (n.d.). Every Student Succeeds Act (ESSA). (Informational landing page only, Reading time: 3.5 minutes)
			• All about OSHA. (2020). U.S. Department of Labor. (Only flier pages 4 -10. Reading time 8 minutes.)
			• Employment Law Guide: Laws, regulations, and technical assistance services. (n.d.). Office of the Assistant Secretary for Policy.
			• Laws enforced by EEOC. (n.d.). U.S. Equal Employment Opportunity Commission. (Reading time: 5 minutes)
			• Prohibited Employment Policies/Practices. (n.d.). U.S. Equal Employment Opportunity Commission. (Reading time: 9 minutes)
			• Continuation of Health Coverage (COBRA). (n.d.). U.S. Department of Labor. (Reading time: 1 minute)

HCLE Standard	Content Outline	Terms & Definitions	Reading

		IV. Other Workplace Standards
		    o Lie Detector Tests - Employee Polygraph Protection Act
		V. Work Authorization for non-U.S. citizens
		    o General Information on Immigration, Including I-9 Forms - Immigration and Nationality Act
		Laws Enforced by the EEOC
		• Title VII of the Civil Rights Act of 1964 (Title VII)
		• The Pregnancy Discrimination Act
		• The Equal Pay Act of 1963 (EPA)
		• The Age Discrimination in Employment Act of 1967 (ADEA)
		• Title I of the Americans with Disabilities Act of 1990 (ADA)
		• Sections 102 and 103 of the Civil Rights Act of 1991
		• Sections 501 and 505 of the Rehabilitation Act of 1973
		• The Genetic Information Nondiscrimination Act of 2008 (GINA)
		Laws Impacting Education Organization
		• Every Student Succeeds Act (ESSA)
		• Family Educational Rights and Privacy Law (FERPA)	

P.SR.2 Manage risk.	• Adverse impact • Adverse Impact Analysis • Disparate treatment • Strategies for identifying and managing risk • Risk analysis • Feasibility analysis	• **Adverse Impact:** An employment decision, practice, or policy that unintentionally disadvantages members of a protected class (e.g. race/ ethnicity, gender). • **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) • **Break-Even Analysis:** Find the number of units needed for zero loss or profit. *(Formula: Break-even point = fixed costs / (price per unit – variable cost per unit; Format of result: # of units)* • **Cost-Benefit Analysis:** Allows an organization to decide if the benefits a program or project brings outweighs the expenses or costs. *(Formula: Benefits – costs; Format of result: dollar value)* • **Disparate Treatment:** An employment practice that intentionally disadvantages members of a protected class. • **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. • **Overall Risk:** Place incidents on a matrix based on level of impact (e.g., moderate, minor, none) and likelihood of occurrence (likely, possible, unlikely). This then allows the	• Uniform Guidelines on Employee Selection Procedures. (2014). Equal Employment Opportunity Commission. (Read Section 1607.1 – 1607.4, 1607.11, Reading time: 12 minutes) • Understanding adverse impact. (2018). PSI. (Reading time: 22 minutes) • What is a feasibility study? (n.d.). MarketBusinessNews. Definition and examples. (Reading time: 3 minutes, Video: 1:31) • Managing Project Risk. (n.d.). (Only section 11.1 and 11.2, Reading time: 19 minutes) • Why measure HR costs? (n.d.). Academy to Innovate HR.

HCLE Standard	Content Outline	Terms & Definitions	Reading
		organization to assign an overall risk rating and (e.g., high, medium, low), and manage each risk in the appropriate way. • **Relative Risk:** Identify potential risks/threats to the organization and prioritize them based on their impact and likelihood of occurrence. • **Risk Analysis:** Evaluating 1) relative and 2) overall risk are two approaches to risk analysis. These reviews should be conducted by a team. • **Risk Assessment:** The process of identifying potential hazards and issues that could harm or stop a project, plan, process, person or organizations. • **Return on Investment (ROI):** Calculates the benefits/earnings from the investment as a percentage or ratio of the original amount invested. *(Formula: ROI = (benefits or earnings received from investment – investment costs) / investment costs; Format of result: percent or ratio)* • **Risk management:** The process of identifying and assessing the risks to a project, plan, process, person, or organization and managing those risks to minimize impact. • **Total Cost Calculation:** Assesses whether adequate resources are available to implement a new program or scale up an existing program. *(Formula: Total costs = Total fixed costs + Total variable costs; Format of result: dollar value)*	
P.SR.3 Develop sustainable human capital systems and services.	• Fixed costs • Variable costs • Types of sustainability • Fiscal sustainability • Programmatic sustainability	• **Fiscal Sustainability:** The ability of an organization to continue to fund (with cash) a project or program. • **Fixed Costs:** Expenses or costs that remain constant regardless of the quantity of products or services produced. • **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. • **Variable Costs:** Costs that change based on the quantity of products or services produced.	• [How to calculate fixed costs: A guide to fixed cost in business.](#) (2020). MasterClass. (Reading time: 3 minutes) • Nickolas, S. (2020). [Variable cost vs. fixed cost: What's the difference?](#) *Investopedia.* (Reading time: 4 minutes)

Continuous Improvement

HCLE Standard	Content Outline	Terms & Definitions	Reading
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.	• Ulrich, D. & Brockbank, W. (2005). Focusing on customers. SHRM. (Reading time: 13 minutes) • Ulrich, D. (1998). A new mandate for human resources. *Harvard Business Review.* (Reading time 25 minutes)
P.CI.2 Evaluate the HCMS.	• Identifying, mapping, and measuring processes • COPIS • Input/Process/Output measures • Leading/Lagging indicators	• **COPIS or SIPOC:** A tool that provides a high-level view of the key elements of a process. COPIS stands for Customers, Outputs, Process, Inputs, and Suppliers. • **Input Measures:** Amount of resources put into the process or the preconditions necessary for the transformation process. • **Lagging Indicator**: Measures performance after a process outcome starts to follow trend. • **Leading Indicator**: Measures performance before a process outcome starts to follow a trend. • **Outcome Measures**: Data on changes or benefits to the customer. Shows what the outputs of a process accomplish. • **Output Measures:** Data on the number of products or services produced/delivered by a process. • **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. These can be used individually, or in combination to assess and improve processes. See the Mapping Processes resources in the Continuous Improvement online module for examples and a practice activity.	• Hessig, T. (n.d.). Process Mapping. *SixSigmaStudyGuide.com* (Reading time: 11 minutes) • The ultimate guide to COPIS diagrams. (2017). SixSigmaNinja. (Reading time 5 minutes) • Watts, S. Leading vs Lagging Indicators: What's The Difference? (2019). (Reading time: 5 minutes) • What is a Key Performance Indictor? (n.d.). KPI.org. (Reading time: 5 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		• **Process Measures:** Data on how services are provided, or products are created. • **Swim Lane Diagram:** Process map that distinguishes which employee or workgroup has responsibility for each step of the process. Swim lanes can be organized horizontally or vertically.	
P.CI.3 Improve the HCMS.	• Valid and reliable measures • Identifying systemic bias • Root cause analysis • Monitoring performance	• **Bias:** A stereotype in favor of or against a person or group. Bias can be conscious or unconscious and can impact any type of employment decision (e.g., hiring, evaluation, promotion). See the article by Campbell for common types of bias. • **Dashboard:** A tool that displays real-time or near real-time information and is used to monitor and improves processes. • **Fishbone Diagram:** A root cause analysis tool used to brainstorm and categorize potential causes for a problem. • **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. See the Root Cause Analysis resource in the Continuous Improvement online module for examples. • **Scorecard:** A tool that is updated quarterly or annually and displays high-level metrics that are linked to strategic goals. • **Validity:** The extent to which a data collection procedure measures what it is supposed to measure. Also referred to as accuracy. • **Waste:** Identifying and eliminating waste improves the output, reliability, and quality of processes. The eight types of waste are Defects, Overproduction, Waiting, Neglected talent, Transportation, Inventory, Motion, and Excess processing. See the Identifying and Eliminating Waste resource in the Continuous Improvement online module for examples. • **5-Whys Analysis:** An iterative questioning process that involves asking why repeatedly to uncover the root cause of an issue.	• Campbell, K. (n.d.). 10 Performance Review Biases and How to Avoid Them. *Culture Amp.* (Reading time: 12 minutes) • Chiang, I., Jhangiani, R., and Price, P. (n.d.). Reliability and validity measurement. • What is a balanced scorecard? (n.d.) *Balanced Scorecard Institute*. • Skhmot, N. (2017). The 8 wastes of lean. The Lean Way. • Use 5 Whys to find the root cause. (2019). SixSigmaNinja. (Free 2.5 hour certification on process improvement that would help you prepare for any questions related to process improvement on the exam: Problem-Solving Yellow Belt Training & Certification)

STRATEGIC STAFFING (Exam Weighting: 25%)

Workforce Planning

HCLE Standard	Content Outline	Terms & Definitions	Reading
S.WP.1 Analyze staffing requirements to meet strategic goals.	• Workforce planning process: Involves three steps: 1) supply analysis, 2) demand analysis, and 3) gap analysis.	• **Demand Analysis:** An evaluation of future needs of the organization including desired staffing levels; desired knowledge, skills, and abilities; and projected personnel expenses. • **Gap Analysis:** The process of comparing supply and demand to identify areas of misalignment. • **Supply Analysis:** An evaluation of current resources including staffing levels; staff knowledge, skills, and abilities; and projected funding. • **Workforce Analysis:** Process of examining data to uncover gaps between supply and demand. It is the first phase of workforce planning and serves as the foundation of a workforce plan. • **Workforce Plan:** Report that identifies targeted strategies to ensure that the organization's workforce is operating within budget and addresses the existing and anticipated needs of all learners. • **Workforce Planning:** Process to align the workforce with the needs and priorities of the organization and the students it serves.	• Louch, P. (2014). Workforce Planning Is Essential to High-Performing Organizations. *SHRM.* (Reading time: 13 minutes) • Workforce Planning. (n.d.) *National Institutes of Health.* (Various resources on the process, examples, questions to ask, data collection examples, etc.)
S.WP.2 Create job descriptions that reflect position requirements.	• Purpose and core components of a job description • Job analysis	• **Job Analysis:** Systemic study of jobs to determine what activities (tasks) and responsibilities they include, personal qualifications necessary for performance, conditions under which work is performed, and reporting structure. • **Job Description:** Written summary of the qualifications required to perform a job, including duties, responsibilities, physical requirements, and necessary qualifications. (Jobs descriptions are a foundational part of many HR processes.)	• Job Analysis. (n.d.). *U.S. Office of Personnel Management.* (Website reading time: 1 minute) • Job Analysis. (n.d.). *U.S. Office of Personnel Management.* (PDF Presentation) • Guide to writing job descriptions. (2013). *UC Santa Cruz.*

Human Resources Branding

HCLE Standard	Content Outline	Terms & Definitions	Reading
S.BR.1 Present a consistent organizational brand.	• Assessing your HR brand: Role of actual candidates, ideal	• **Actual Candidates:** People who have applied for a position in your organization. Help you determine how well an HR brand intervention worked.	• Krasinski, M. (2018). Everything you need to know about HR Branding. HRZONE. (Reading time: 5 minutes)

candidates, and incumbents • Communicating your brand		**Employee Value Proposition:** A statement that communicates the essence of an organization—how it is unique, what it stands for, and why people would want to be part of it. • **Human Resources (HR) Branding:** Process of managing and influencing your reputation as an employer with current and prospective employees and stakeholders. • **Ideal Candidates:** Person(s) who would best meet your needs in a position. Help you hypothesize what the future-state HR brand should be. • **Incumbents:** Person(s) who are currently in a specific position within the organization. Help you analyze your current HR brand. Also see definitions and references under P.CO.1 Use communications to ensure effective implementation of the HCMS.	• Mitchel, M. (2020). The Essential Guide to Employer Branding in 2020. SmartRecruiters. (Reading time: 7 minutes) • Employee branding. (n.d.) Human Capital Resource Center. • Clayton, S. J. (2018). How to strength your reputation as an employer. Harvard Business Review. (Reading time: 8 minutes)

Sourcing and Recruiting

HCLE Standard	Content Outline	Terms & Definitions	Reading
S.SR.1 Identify sources of high-quality candidates.	• Sourcing practices	• **Sourcing:** Uncovering sources of high-potential candidates by reviewing information on current successful employees.	• Chapter 4: Recruitment. (2011). University of Minnesota. (Reading chapter 4 introduction, 4.1, 4.2, and 4.3, reading time 40 minutes) • Groysberg, B., Nohria, N., & Fernández-Aráoz, C. (2009). The definitive guide to recruiting in good times and bad. Harvard Business Review. (Reading time: 29 minutes)
S.SR.2 Develop a recruitment strategy.	• Building a talent pipeline: e.g., Grow-your-own programs, Alternative certification programs, Community partnerships	• **Talent Pipeline:** Pool of potential candidates who are qualified and prepared to fill key roles in your organization when there are openings. • **Talent Pipeline Management:** Actively building and maintaining a sustainable pool of talent for your organization. • **Recruiting:** Targeted strategies to identify qualified candidates and convince them to apply to your organization. • **Active candidates:** Individuals who are currently searching for a new job. • **Passive candidates:** Individuals who possess desired skills and/or qualifications, but who are not actively searching for a new job.	(See S.SR.1 reading referenced above)
S.SR.3 Implement the recruitment strategy.	• Internal & External recruitment: Advantages and disadvantages	• **External Recruitment:** Looking outside the organization to fill an open position. • **Internal Recruitment:** Looking at employees within the organization to fill an open position.	(See S.SR.1 reading referenced above)

HCLE Standard	Content Outline	Terms & Definitions	Reading

| | | • **Targeted Recruitment:** Active process of identifying individuals who meet specific criteria. Often used when hiring for high-level positions or positions that require a specialized skillset. | |

Selection & Placement

HCLE Standard	Content Outline	Terms & Definitions	Reading
S.SP.1 Develop a selection process.	• Types of staffing strategies (i.e., centralized, de-centralized/site-based, hybrid). • Strategies for maximizing reliability, validity, and efficiency in the selection process (e.g., funneling). • Types of interviews and questions (structured, unstructured, behavior-based, situational, knowledge-based). • Goals of realistic job previews.	• **Behavior-Based Interview Questions:** Interview questions that attempt to tap into candidates' past behavior to help make predictions about future behavior. They generally ask candidates to describe what they did in specific situations and share the outcomes of their efforts. • **Competencies:** The knowledge, skills, abilities, and professional qualities needed to perform a job. • **Cost per Hire:** The costs associated with hiring a new employee, which may include recruiting, screening, and training expenses. Calculated by dividing total costs by the number of people hired. • **Funneling:** A hiring process that quickly sorts through applicants using low-cost, low-effort methods in the preliminary stages to help preserve resources for use in screening and hiring the most promising candidates for a position. • **Inter-Rater Reliability:** The extent to which two or more individuals (coders, raters, observers, etc.) agree (i.e., give consistent estimates of the same phenomenon). • **Job-Relevant Criteria:** Hiring criteria that are directly related to the requirements and responsibilities of a specific job. • **Knowledge/Competency-Based Questions:** Interview questions geared toward assessing specific areas of knowledge or skill. • **Realistic Job Preview:** An approach that provides candidates with accurate and complete information about a job and the work environment, including both positive and negative aspects of the position. • **Selection:** Process to identify the most suitable candidate for an open position based on the competencies required to perform the job.	Selection Process: • Finster, M., & Jackson, C. (2020). Strengthening the Teacher Workforce Through Selection Processes. Rockville, MD: National Comprehensive Center at Westat. (Reading time: 10 minutes) • Gittman, L., McDaniel, C., Shah, A., Reece, M., Koffel, L., Talsma, B., & Hyatt, J. (2018). Introduction ro Busienss: 64. Employee Selection. Rice University. OpenTextBC. (Reading time: 9 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		• **Situational/Scenario-Based Questions:** Interview questions that require candidates to problem-solve in the moment by asking them to respond to scenarios. • **Structured Interviews:** Interviews that follow outlines, are grounded in strictly job-related questions (that are uniform across a candidate pool) and often use predetermined rating scales to evaluate candidate responses. • **Unstructured Interviews:** Interviews that tend to be largely conversational, do not follow predetermined outlines and may include job-irrelevant questions. Employers who administer unstructured interviews often vary the questions they ask from one applicant to the next.	
S.SP.2 Select and hire staff.	• Federal laws and guidelines relevant to employee hiring and selection.	See definitions and references under P.SR.1 Apply knowledge of relevant law and regulations to education organizations. • **Adverse Impact:** A significantly different rate of selection in hiring, promotion, or other employment decisions that negatively and disproportionately impacts members of a specific race, gender, or ethnic group. • **Bona Fide Occupational Qualification (BFOQ):** Any employment qualification that appears to be discriminatory but that is justifiable due to business necessity. • **Defamation:** Any intentional false communication, either written or spoken, that harms a person's reputation; decreases the respect, regard, or confidence in which a person is held; or induces disparaging, hostile, or disagreeable opinions or feelings against a person. Employers who provide negative reference information about former employees can be subject to claims of defamation. • **Disparate Treatment:** An employment decision, practice, policy, or tool that intentionally discriminates against a protected class based on race, color, religion, sex, or national origin. • **Equal Employment Opportunity (EEO):** Employment practices that ensure nondiscrimination on the basis of race, sex, religion, color, national origin, physical or mental ability, medical condition, age, or genetic information. • **Protected Class:** Specific groups of individuals who are protected from employment discrimination by law. An individual may be in a protected class due to their race, color, gender, religious beliefs, national origin, mental or physical disability, genetic information, pregnancy, or veteran status. An	• Uniform Guidelines on Employee Selection Procedures. (2014). Equal Employment Opportunity Commission. (Read Section 1607.1 – 1607.4, 1607.11, Reading time: 12 minutes) • Understanding adverse impact. (2018). PSI. (Reading time: 22 minutes) • EEO Guidelines for Interviewing Applicants. (n.d.). Wake Forest University.

HCLE Standard	Content Outline	Terms & Definitions	Reading
		individual can be a member of one or more protected classes, and state laws can define additional protected classes such as marital status, sexual orientation, and even smokers.	
S.SP.3 Determine placements for new and existing staff.	• Placement strategies for dealing with students' inequitable access to effective instruction. • Implications of state equity plans for human capital leaders in education.	• **Centralized Staffing Function:** Staffing processes are standardized and directly controlled by the central office management team. • **Decentralized Staffing Function:** Staffing is managed locally, with strategies and processes that are tailored to local circumstances. • **Equity gap:** The difference between the rate students from low-income families or students of color are educated by excellent educators and the rate at which other students are educated by excellent educators. • **Placement:** The process by which staff are assigned to buildings and/or groups of students.	• [Equity of Opportunity.](#) (n.d.). *U.S. Department of Education.* • [State Plans to Ensure Equitable Access to Excellent Educators Guidance and Examples for States](#). (2015). *Reform Support Network.*

TALENT MANAGEMENT & DEVELOPMENT   (Exam Weighting: 20%)

Onboarding

HCLE Standard	Content Outline	Terms & Definitions	Reading

T.ON.1 Orient new employees to the organization.	• Orientation
	• How employee handbooks and other communication channels can be used to communicate workplace policies and protocols.
	• Types of information (i.e., organizational, job-specific, community) included in a comprehensive orientation experience.
		• **Employee Handbook:** Document used to communicate important workplace policies and expectations to employees.
		• **Onboarding:** Process of helping new employees adjust to the performance and cultural aspects of their new roles over an extended period of time (often 6 months or more).
		• **Orientation:** Process that focuses on paperwork and other compliance activities for new hires. Typically, this is a one-time event held before an employee begins their new job.
		• **Types of Information:** Comprehensive orientation and onboarding programs introduce new employees to their role and work team and help them learn about the organization and the community it supports.
		   ○ Organization information: e.g., District overview, Vision, mission, and goals, Facilities, Organizational policies and rules, Benefits and employee support services
		   ○ Job-specific: e.g., Job duties and expectations, Department or team goals, Introduction to manager and colleagues
			• Ohio Department of Education Human Capital Resource Center. (n.d.) *[Onboarding introduction.](#)*
			• Inc. Staff. (2021). [What to Include in an Employee Handbook](#). Inc.

HCLE Standard	Content Outline	Terms & Definitions	Reading
		o Community: e.g., Relocation information, Local businesses, Banking, Transportation	
T.ON.2 Onboard new employees.	• Goals of onboarding. • Core components of onboarding (i.e., mentoring, meaningful collaboration, customized learning opportunities). • Differences between coaching and mentoring.	• **Coaching:** Relationship between two individuals that tends to be short-term and focused on improving performance. • **Mentoring:** Relationship between two individuals focused on long-term development toward career goals and objectives.	Zust, C. Know the Difference Between Coaching and Mentoring. (2017). Kent State University. (Reading time: 6 minutes) Also see above resources under T.ON.1.

Training & Development

HCLE Standard	Content Outline	Terms & Definitions	Reading

T.TD.1 Coordinate training and professional development programs.	• Two types of adult development (i.e., horizontal, vertical), and how to support both through training and development.
	• Implications of zones of safety (i.e., risk zone, danger zone) for learning.
	• Principles of adult learning (i.e., self-directed, transferrable, connected, experiential, goal-oriented), and implications for professional development.
		• **Adult Learning Principles:**
		  o Self-directed- Provides choice and opportunities to prioritize activities.
		  o Transferrable: Has real-life use in their current role.
		  o Connected: Builds on what learners know and do well while extending their thinking.
		  o Experiential: Provides opportunities for processing, hands-on application, and reflection.
		• **Andragogy:** The method and practices of teaching adult learners.
		• **Horizontal Development:** Acquiring new knowledge, skills, and competencies.
		• **Professional Development:** Learning activities that expand skills, knowledge, and abilities to support personal growth and career advancement; also referred to as professional learning.
		• **Training:** A learning activity focused on the acquisition of knowledge and skills required for a particular job or task.
		• **Vertical Development:** Advancing the capability to think in more complex, systemic, and interdependent ways.
		• **Learning Zone Model:** Model that can be used for designing learning experiences. Divides the experience of learning into three zones.
			• Chan, K. (2020). The Learning Zone Model. (Reading time: 2 minutes)
			• Developing Talent? You're Probably Missing Vertical Development. (n.d.). Center for Creative Leadership. (Reading time: 3 minutes)
			• O'Neill, E. (2020). What is Adult Learning Theory? LearnUpon. (Reading time: 4 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		o Comfort Zone- Limited opportunity for learning. Often involves routine tasks that don't require individuals to acquire new knowledge or skills. Can provide a safe space for individuals to reflect and make sense of their experiences. o Risk Zone- Optimal space for learning. Requires individuals to stretch beyond their current capabilities. o Danger/Panic Zone: Learning is blocked by fear and anxiety. Individuals feel overwhelmed by expectations.	

Performance Management

HCLE Standard	Content Outline	Terms & Definitions	Reading
T.PM.1 Implement a comprehensive evaluation system.	• Components of a comprehensive evaluation system (i.e., goals and expectations; assessment; reflection, feedback, and support). • Uses of performance evaluation: compensation decisions and performance feedback most common. • Strategies for improving validity and reliability in evaluation systems. • Conducting evaluations.	• **Comprehensive Evaluation:** The ongoing process of using multiple measures to assess individual or group performance relative to clearly defined standards and provide opportunities for reflection, feedback, and support. • **Performance Management:** Process of maintaining or improving job performance through ongoing communication between a supervisor and an employee in support of accomplishing the strategic goals of the organization.	• Black, S. & Bright, D. (2019). *Organizational Behavior: 8.1 Performance Appraisal Systems.* Rice University. OpenStax. (Reading time for section 8.1 only: 8 minutes) • Campbell, K. (n.d.). 10 Performance Review Biases and How to Avoid Them. *Culture Amp.* (Reading time: 12 minutes) • U.S. Equal Employment Opportunity Commission. (n.d.). *I'm conducting performance evaluations*. (Reading time: 1 minute)
T.PM.2 Address employee discipline	• Seven tests for just cause, as part of due process.	• **Due Process:** Requirement to respect the legal rights afforded to individuals. **Seven Tests for Just Cause**	• UC Berkeley. (n.d.). Seven Tests for Just Cause in *Guide to Managing Human Resources.* (Reading time: 3 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
and ensure due process.	• How to respond to discipline issues.	1. Adequate warning- Has the employee been informed of rule or policy and consequences of not meeting those expectations? 2. Reasonableness of policy- Does the policy impact safe and efficient operations? 3. Completeness of investigation- Was an investigation conducted before deciding upon disciplinary action? 4. Objectivity of investigation- Was the investigation fair and take all sides of the story into account? 5. Proof of infraction- Have you obtained factual evidence? 6. Uniformity of rules application- Have disciplinary actions been applied consistent and predictably in the past? 7. Reasonableness of discipline- Have you established a progressive discipline process and considered the context of the situation?	
T.PM.3 Manage employee transitions.	• Difference between voluntary and involuntary employee exit, and common drivers of each. • Difference between stay interviews and exit interviews, including their respective goals and processes. • How to manage the employee exit process. • Federal legislation and guidelines that have implications for performance management, including	• **Exit Interview:** A conversation held with an employee to learn about their motivations for leaving the organization. • **Involuntary Turnover:** Occurs when the decision to end employment is made by the organization. Common reasons include layoffs or reductions in force and performance issues. • **Stay Interview:** A regular, informal conversation between a supervisor and an employee about the employee's level of job satisfaction and specific ways the supervisor can maintain or improve it. • **Voluntary Turnover:** Occurs when the decision to end employment is made by the employee such as a resignation or retirement. Also see terms and references under P.SR.1 Apply knowledge of relevant law and regulations to education organizations.	• Ohio Department of Education Human Capital Resource Center. (n.d.). *Stay Interviews*. (Read Stay Interviews Defined. Reading time: 1 minute) • Elder, E. (2017). 3 Tips to Effectively Manage Employee Career Transitions. Randstad Risemart. (Reading time: 6 minutes) Stay Interviews - https://assets.noviams.com/novi-file-uploads/aaspa/Perspectives/Aug_2020_persp_FINAL.pdf •

HCLE Standard	Content Outline	Terms & Definitions	Reading
	evaluation and employee exit.		

Career Ladders & Succession Planning

HCLE Standard	Content Outline	Terms & Definitions	Reading
T.CL.1 Support high-performing employees in increasing their organizational impact.	• Goals of career ladders • History of career ladders in education. • Difference between career ladder and career lattice.	• **Career Ladders:** Professional pathways through which individuals can more broadly impact and expand their role in the organization. Also referred to as career pathways, career lattices, and career tracks.	• Doyle, A. (2020). Career paths: What are they? The Balance Careers. (Reading time: 5 minutes) • SHRM. (n.d.). Developing Employee Career Paths and Ladders. • Giannosa, J. (2019). Career Ladders vs. Career Lattices - Tools for Employee Development. EDSI. (Reading time: 6 minutes) • Chamorro-Premuzic, T., Adler, S., & Kaiser, R. (2017). What science says about identifying high-potential employees. Harvard Business Review. (Reading time: 7 minutes)

T.CL.2 Plan for the succession of employees.	• Goals of succession planning.
	• Types of positions that are well suited for succession planning. Succession planning processes and tools (e.g., candidate slate, nine-cell chart).
	• Knowledge transfer strategies to support succession planning and ensure smooth transitions as employees change roles or leave the organization.
		• **Succession Planning:** Process for identifying and developing high-performing internal staff to assume critical positions within an organization.
		• **Candidate Slate:** This simple organizational tool helps identity future candidates for identified roles in an organization, as part of the succession planning process. The following table is completed for each role:
		
		JOB TITLE/ Organization Position Level
		Current Employee Name
		Possible employees to replace individual in order of preference:
		  o Employee Name #1
		  o Employee Name #2
		  o Employee Name #3
		
		• **Nine-Cell Chart:** This succession planning tool uses two parameters to assess employees' readiness to assume new positions in the organization. It involves a three-step process: 1) Use evaluations and other data to plot employees based on (a) their performance and (b) extent to which their actions/behaviors align with organizational values; 2) Have
			• Ohio Department of Administrative Services. (2011). Succession Planning Manager's Toolkit. (Read pgs 8-10, 13-14, Reading time: 6 minutes)
			• Bright, D. & Cortes, A. (2019). Principles of management: 11.6 Talent Development and Succession Planning. (Reading 11.6 only, Reading time: 12 minutes)
			• Phillippi, M. (2017). Using the performance values matrix alongside a 9-box grid. Performance Culture. (Reading time: 8 minutes)

managers review and suggest adjustments; and 3) Finalize
charts and use for further development and decision-making.

CULTURE & TOTAL REWARDS (Exam Weighting: 20%)

Employee Engagement

HCLE Standard	Content Outline	Terms & Definitions	Reading
C.EE.1 Foster employee engagement.	- Employee engagement - Characteristics of engaged, disengaged, and actively disengaged employees and their impact - Strategies for assessing employee engagement - Theories of motivation and engagement (i.e., Maslow's Hierarchy of Needs, Theory X and Theory Y, Expectancy Theory, Self-Determination Theory, Implicit Theories/Mindsets, Motivation-Hygiene Theory).	**Employee Engagement:** The quality of individuals' interactions with their work and strength of their commitment to their workplace. **Employee Satisfaction:** Extent to which employees are happy or content with their jobs or work environment. **Expectancy Theory:** Individuals' motivation is result of three factors 1) Valence: how much the individual values the reward, 2) Expectancy: extent to which the individual believes their increased efforts will lead to improved performance/success at a task, 3) Instrumentality: belief that if they perform well, they'll receive the reward. **Maslow's Hierarchy of Needs:** Suggest people have varying levels of needs, each of which must be met before progressing to the others. **Motivation:** Internal and external factors that drives the desire and energy of someone to be committed to their work or pursue a goal. **Motivation-Hygiene Theory:** Certain factors cause job satisfaction when they are present (motivation factors) while others cause dissatisfaction when they are absent (hygiene factors) **Self-determination Theory:** People have three fundamental needs autonomy, competence, and relatedness that, when met, foster intrinsic motivation and overall wellbeing. **Theories of Intelligence:** Individuals' beliefs about intelligence and ability known as implicit theories or mindsets tend to fall into one of two categories. Entity theory/fixed mindset is characterized by the belief that intelligence and ability are fixed and stable traits. Incremental theory/growth mindset is characterized by the	- Souders, B. (2020). 20 most popular motivational theories. PositivePsychology.com. (Reading time: 16 minutes) - What is employee engagement and how do you improve It? (n.d.). Gallup. (Reading time: 17 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		belief that intelligence and ability are malleable and can be improved. • **Theory X:** Belief that people naturally dislike work and avoid responsibility so employees must be constantly directed and supervised. • **Theory Y:** Belief that if people find their work satisfying, they will seek out challenging work and additional responsibility.	
C.EE.2 Oversee labor relations and professional associations.	• History of labor relations/collective bargaining, and implications for practice. • Goals of, and processes involved in, interest-based bargaining.	• **Interest-based Bargaining:** Negotiation strategy in which parties collaborate to develop mutually beneficial agreements. Also referred to as integrative bargaining and win-win bargaining. • **Positional Bargaining:** Negotiation strategy that involves holding to a fixed idea or position.	• Shonk, K. (2019). Positional Bargaining Pitfalls. Harvard Law School. (Reading time: 4 minutes) • Geiger, M. (n.d.). Interest Based Bargaining. (Reading time: 64 minutes)

Rewards & Recognition

HCLE Standard	Content Outline	Terms & Definitions	Reading
C.RR.1 Develop a total rewards strategy.	• Components of a total rewards framework (i.e., experiential/intangible, financial/tangible, individualized, group), and the types of rewards that fall under each category. • Implications of rewards and recognition practices based on theories of motivation and engagement. • Difference between rewards and recognition.	• **Experiential Rewards:** Rewards that are intangible. Employees experience them when they engage in work programs or activities. • **Financial Rewards:** Rewards that are tangible and can be measured or assigned a value or cost. • **Negative Incentive:** Punishes individuals for undesirable choices or behavior. • **Positive Incentive:** Rewards individuals for desirable choices or behavior. • **Recognition:** Formal or informal acknowledgement of effort or desired behavior. • **Reward:** Awards performance or accomplishment. • **Total Rewards:** All the financial and experiential incentives, rewards, and benefits provided to employees by their employer. • **Total Rewards Philosophy:** The principles that guide the design, delivery, forms, and determination of total rewards programs.	• Aon Hewitt. (2012). Total Rewards Survey. (Read Aon Hewitt's Total Rewards Framework and pages 10-15, Reading time: 6 minutes) • Hanson, F., Smith, M., & Hansen, R. (2002). Rewards and Recognition in Employee Motivation. *Compensation Benefits Review, 34*(5), 64-72. (Reading time: 18 mins) • Willis Towers Watson. (2018). Mapping the New Total Rewards Journey. (Pages 3-12, Reading time: 16 minutes) • Chou, K. (n.d.). Salary Structures - Purpose, Components and Types. WorldatWork TV. (Video time: 8:09)

Compensation & Benefits

HCLE Standard	Content Outline	Terms & Definitions	Reading
C.CB.1 Design an aligned compensation system.	• Organization strategy, HCMS strategy, and compensation • Fixed and Variable pay • Process of ensuring pay is externally competitive and internally equitable • Competencies • Advantages/ disadvantages of job evaluation methodologies: point factoring, ranking, classification • Market analysis • Direct and Indirect compensation • Making compensation system adjustments • Legislation affecting compensation	• Compensation study process to ensure base pay is both market competitive and internally equitable: 1) update job descriptions using job analysis, 2) conduct job evaluation, and 3) complete a market study analysis • organizational strategy informs compensation strategy (organizational strategy à HR strategy à compensation strategy • **Bonus:** Direct or indirect compensation that is offered in addition to an individual's base pay, usually awarded upon achieving a goal or milestone. • **Classification:** A job evaluation method in which jobs are classified into an existing grade/category structure or hierarchy. Each level in the grade/category structure has a description and associated job titles. • **Compensation Study:** Process of analyzing current pay structures and practices to ensure external market equity and that internal job worth mirrors the organization's market and strategy. • **Cost-of-Living Adjustment (COLA):** An across-the-board base pay inflation designed to align with increases in the cost of living. • **Direct Compensation:** A monetary incentive or reward. • **Fixed pay:** Pay that does not vary based on performance or results achieved. The basic cash compensation that an employer pays for work duties. Also referred to as base pay. • **Indirect Compensation:** Pay received in the form of services and benefits (i.e., pensions, health insurance, vacations). • **Job Evaluation:** A process for determining the relative compensatory value of a job in an organization. • **Market Analysis:** The benchmarking of wages paid to employees with wages paid to individuals in similar positions in the marketplace. • **Point Factoring:** A job evaluation method in which jobs are ranked using a system based on factors and points. • **Ranking:** A job evaluation method in which jobs are compared to each other based on the overall worth of the job to the organization.	• Compensation Toolkit. (n.d.). Ohio Department of Education Human Capital Resource Center. • Carver, C. (2013). Compensation 102: Job Evaluation. Astron Solutions. (Reading time: 3 minutes) • Pinarchick, C. (2019). Follow These 7 Steps to an Effective Pay-Equity Audit. Human Resource Executive. (Reading time: 5 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		• **Strategic Compensation:** The alignment of compensation with desired organizational goals. • **Variable pay:** Pay that changes directly with the level of performance or results achieved. Also see definitions and references for legislation pertaining to compensation under P.SR.1 Apply knowledge of relevant law and regulations to education organizations.	
C.CB.2 Develop a benefits program.	• Healthcare network types: HMO and PPO • Healthcare plan terminology	• **Co-pay:** A fixed amount an individual pays for a covered health care service. • **Deductible:** Amount an individual pays for covered health care expenses before an insurance company begins to pay on a health insurance claim. • **Health Maintenance Organization (HMO):** Typically have lower monthly premiums and out-of-pocket expenses. Specialist visits require a referral from your primary care physician. Coverage isn't provided for out-of-network healthcare providers. • **Preferred Provider Organization (PPO):** Typically have higher monthly premiums and out-of-pocket expenses. Able to see a specialist without a referral. Visits to out-of-network providers has a higher fee and separate deductible. • **Premium**: The amount that an individual and/or their employer pays for a health insurance plan. Also see definitions and references for legislation pertaining to benefits under P.SR.1 Apply knowledge of relevant law and regulations to education organizations.	• [Benefits Toolkit](). (2019). Ohio Department of Education Human Capital Resource Center.

Organizational Culture

HCLE Standard	Content Outline	Terms & Definitions	Reading
C.OC.1 Foster a culture that supports learning.	• Wellness • Well-being • Levels of culture - Underlying assumptions, values, and artifacts	• **Culture:** Beliefs, values, and norms that are shared across an organization and inform employee behavior. • **Three Levels of Culture** o Artifacts: Tangible and visible representations of culture such as office	• [Employee Wellness vs Employee Wellbeing: What's the Difference and Why the Latter is Vital](). (2020). All Things Talent. (Reading time: 7 minutes) • Lumen Learning Team. (n.d.) [Levels of Organizational Culture]() in *Organizational Behavior and Human Relations.* Lumen Learning. (Reading time: 1 minute, Video: 11 minutes)

HCLE Standard	Content Outline	Terms & Definitions	Reading
		location, classroom layout, artwork, posters, and the dress code. Artifacts provide the first impression of an organization's culture. ○ Values: Stated reasons for how the organization operates. Includes the mission, vision, goals, and philosophies that drive behavior. ○ Underlying Assumptions: Shared, taken-for-granted beliefs. Provide the foundation for the values and artifacts levels of culture. • **Well-being:** The state of being happy, healthy, and prosperous. It involves emotional, physical, psychological, social, career, and financial health. • **Wellness:** The state of being in good physical and mental health.	
6C.OC.2 Promote diversity and inclusion.	• Diversity • Inclusion • Equity • Dimensions of diversity – Personal, Social, Organizational	• **Diversity:** The variety of experiences and perspectives which arise from differences in personal, social, or organizational characteristics. • **Dimensions of Diversity** ○ Personal- often visible and unchangeable traits (e.g., race/ethnicity, color, gender, age, physical ability) ○ Social- reflect life choices of the individual and often revealed only after we get to know someone (e.g., marital status, education level, religion, political affiliations) ○ Organizational- associated with your work identity (e.g., seniority, work location, union membership, job level) • **Inclusion:** The degree to which individuals are valued, respected, and supported.	• Black, S. & Bright, D. (2019). Diversity in Organizations. Organizational Behavior. Rice University. OpenStax. (Reading time: 60 minutes) • Example dimensions of diversity wheel • Introducing An Affinity Group Value Diverse Staff - https://assets.noviams.com/novi-file-uploads/aaspa/Perspectives/nov_persp_2020_spreads_2.pdf