



McGrath Training Systems

## CASE STUDY

## McGrath SUCCEED System

San Jose Unified School District  
San Jose, CA

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# Performance Evaluations Bolstered with Constructive, Clear Documentation

## Providing Continuous Feedback

In the mid-1990s, a San Jose, California school district was grappling with a **common challenge: How to make its employee performance system meaningful.** “We wanted an approach that would be used consistently system-wide - as a tool to parallel our evaluation instrument and to provide frequent feedback and accurate documentation,” explains Mary Ann Rokovich, Director of Professional Development in the San Jose Unified School District. The district’s solution was to bolster its evaluation instrument with the McGrath SUCCEED System.

The cornerstone of the McGrath SUCCEED System is continuous feedback, which is structured around the McGrath **FICA** tools. In their verbal and written communication, administrators and supervisors learn

to clearly state the **Facts** of the situation being discussed, what the positive or negative **Impact** of the situation is, and most importantly, the **Context** in which the situation exists. The communication ends with some type of **Action** for growth or improvement.

Patti Gregory was the district office administrator in the 1990’s who was instrumental in bringing the SUCCEED program into San Jose Unified. Reflecting on the changes the SUCCEED System brought to the district prior to her retirement, Gregory says, “... **we gained the confidence to promptly address the people performance issues that had paralyzed us in the past and the skill to evaluate honestly. Even beyond that, SUCCEED is a thinking process usable in every situation which empowers life long learning. It takes you where you want to go in a non-threatening manner. It is so practical, too!**”



## Behavior Changes Occur

With over 30,000 students served by the San Jose Unified School District, getting everyone who supervises employees immersed in the SUCCEED System was no small task. In 1997, the training was provided to all administrators and supervisors and has been reinforced since then. “We do SUCCEED training every year,” Rokovich says. She views the district’s training investment as money well spent.

“Before they learn the SUCCEED System approach,” Rokovich reveals, “administrators and supervisors don’t document phone calls. They don’t write memos in a format that can be included in a site file or a personnel file. After attending the training, people change their behavior.”

Like many other districts that use SUCCEED, San Jose Unified invited representatives of the teachers’ association to attend the administrators’ training sessions so they could see what SUCCEED is all about. “The union representative had no concerns about the content of what was being presented,” Rokovich said.

## SUCCEED Supports Positive Reinforcement

**One reason that SUCCEED is well received by unions and administrators is that it is as useful for recognizing positive performance as it is for helping remedi-**

**ate poor performance.** Rokovich observes that administrators who were initially trained in SUCCEED in the mid-90s and have taken refresher courses in recent years are impressed with the emphasis on using the SUCCEED FICA tools to recognize achievements. They’re glad they have a framework for supporting San Jose Unified’s recent initiative for positive reinforcement and customer service.



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The administrators and supervisors use the SUCCEED FICA tools to extend kudos for positive customer service to classified staff. They also use the tools to reinforce the continued good work of teachers in their service to students, parents and co-workers.

Rokovich believes the SUCCEED System has been enormously helpful for San Jose Unified schools. She says, **“If you use the SUCCEED tools in your daily communication as positive reinforcement as well as in areas of growth and discipline, it’s quick and easy. It’s in your head; it’s internalized. It’s a way of thinking that goes around with you. You don’t have to pull out a form to figure out how to use it. It can make a difference in every aspect of your life.”**

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