



PROCEDURE FOR MANAGEMENT AND ACADEMIC SUPERVISORY PERFORMANCE EVALUATIONS

In an effort to streamline and simplify the performance evaluation process, the District has created a new performance evaluation tool which is attached. We hope that by simplifying the process we will achieve 100% completion of annual and probationary performance evaluations while not compromising the thoroughness of the evaluation process.

All newly hired managers are reviewed at the end of their six month probationary period and all managers who are promoted into higher level jobs are reviewed at the completion of the six month probationary period.

Following probationary reviews, managers are reviewed annually on their anniversary date of hire or promotion. A manager's anniversary date is defined as the date the manager is granted salary step advancement. For managers assigned to a classification during the first sixteen (16) days of the month, the anniversary date is the first of that month. If assigned after the sixteenth of the month, the anniversary date is the first of the following month.

A performance review should be a constructive way to highlight the manager's strengths and weaknesses. It should be used to help a manager develop better skills and abilities in his or her job and alert the manager's supervisor to where training or skill development may be needed. A performance evaluation should not be used as discipline or in a punitive way. Poor work performance or behavioral concerns should be addressed through corrective disciplinary action.

A formal performance evaluation should not be a surprise to the manager. Ongoing dialogue between a manager and his or her supervisor should occur on a regular basis, and the formal performance evaluation should reflect what has been discussed over the preceding 6 months for probationary reviews and promotional reviews, and the preceding 12 months for annual reviews.

The performance evaluation addresses the following components of a manager's job:

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| 1. Job Knowledge | 6. Quality and Quantity of Work |
| 2. Functional Knowledge | 7. Initiative & Ingenuity |
| 3. Organization | 8. Dependability |
| 4. Leadership/Supervision | 9. Development in Present Position |
| 5. Adaptability & Cooperation | 10. Evaluation of Potential |

Each of the above components is to be rated in one of the following five categories:

- ❖ Superior – for a manager, who performs exceptionally, goes above and beyond what is normally expected, is an informal leader, produces significantly more work and the highest quality of work, and is an overall extraordinary contributor.

- ❖ Exceeds Expectations– for a manager who does more than meets the requirements of the job, pitches in when necessary, assists others and produces more work and higher quality work than others.

- ❖ Meets Expectations – for a manager who meets the job requirements, performs all that is expected of the manager and work is of satisfactory quantity and quality.

- ❖ Needs Improvement – for a manager who may be new in the job and needs to learn more about the job, needs to develop better skills, improve the overall quality and quantity of work, and may need to obtain further training.

- ❖ Unsatisfactory – for a manager who is not performing at a level that is meeting specific requirement of the job.

The evaluation is summarized in a narrative and there is a section on addressing the status of the performance goals if such goals were established the prior year.

The performance evaluation also addresses the manager's strengths, training needs and areas for growth and or improvement. Finally there is an overall performance rating. If an overall rating is meets expectations or better for two successive evaluations, the next evaluation will be conducted in two years.

When completing the overall performance rating, the evaluator should use the ten items that address the various components of a manager's job and weight them equally. As an example, if a manager had two superior, four exceeds expectations, five meets expectations and one needs improvement, the overall performance rating would be exceeds expectations.

When evaluating a manager it is important to be as objective as possible. While it is difficult not to be subjective, it is recognized that there is always a certain element of human subjectivity in evaluating an individual's work performance. Accordingly, it would be unusual for a manager to be outstanding in all aspects of his or her job, just as it would be unusual for a manager to be unsatisfactory in all aspects of his or her job. If such an unsatisfactory evaluation occurs, the first question to be asked is why is the manager still employed?

At the evaluator's option, a manager can be asked to do a self evaluation on the same tool. By doing so it can give the evaluator a better perspective of how the manager views his or her own performance, and can give the evaluator a better base upon which to complete the evaluation. Often times a manager is more critical of his or her own work performance and may rate the performance lower than the evaluator views his or her work. Of course the contrary is also true, where by a manager views his or her work performance as superior in all areas. As discussed above, it is doubtful that such an evaluation is accurate.

Once the manager's evaluation is completed, it should be given to the manager to read and then a meeting should be scheduled to discuss the evaluation, answer any questions the manager may have and finalize the evaluation by having the manager sign the form only to acknowledge that evaluation was discussed and a copy given to the manager. If the manager wished to provide written comments on the form, he or she may do so in a timely manner, so that the evaluation process is not delayed.

Completed evaluations should be sent to the Office of Human Resources to be placed in the employee's personnel file.