

WILLIAM S. HART UNION HIGH SCHOOL DISTRICT
PERFORMANCE EVALUATION REPORT

Classified Personnel

EMPLOYEE _____

WORK SITE _____

CLASSIFICATION _____

DUE DATE _____

PERMANENT ANNUAL RATING _____

PROBATIONARY 1st Prob. Rating _____

2nd Prob. Rating _____

From _____

To _____

SECTION A Immediate supervisor must check each factor in the appropriate column.

- | | |
|---|-----------------------------|
| a | Does not apply |
| b | Exceeds standards |
| c | Effective – Meets standards |
| d | Needs improvement |
| e | Fails to meet standards |

a	b	c	d	e	FACTOR CHECK LIST
<input type="checkbox"/>	1. Knowledge of work				
<input type="checkbox"/>	2. Quality of work				
<input type="checkbox"/>	3. Organization of work				
<input type="checkbox"/>	4. Volume of acceptable work				
<input type="checkbox"/>	5. Meeting deadlines				
<input type="checkbox"/>	6. Effectiveness under stress				
<input type="checkbox"/>	7. Accepts direction				
<input type="checkbox"/>	8. Accepts responsibility				
<input type="checkbox"/>	9. Work judgment				
<input type="checkbox"/>	10. Initiative				
<input type="checkbox"/>	11. Cooperation				
<input type="checkbox"/>	12. Phone etiquette				
<input type="checkbox"/>	13. Ability to relate to public and students				
<input type="checkbox"/>	14. Working relationship with employees				
<input type="checkbox"/>	15. Punctuality & attendance				
<input type="checkbox"/>	ADDITIONAL FACTORS				

ADDITIONAL FACTORS FOR THOSE IN LEAD POSITIONS:

<input type="checkbox"/>	1. Leadership				
<input type="checkbox"/>	2. Scheduling & coordination				
<input type="checkbox"/>	3. Training & instruction				
<input type="checkbox"/>	4. Productivity				
<input type="checkbox"/>	5. Judgments & decisions				
<input type="checkbox"/>	ADDITIONAL FACTORS				
<input type="checkbox"/>					
<input type="checkbox"/>					

Checks in Column (b) **MUST** be explained in Section B.
 Checks in Columns (d) or (e) **MUST** be explained in Section D.

SECTION B Record job **STRENGTHS** and superior performance. (Explain checks in Column b)

SECTION C Record **PROGRESS ACHIEVED** in attaining previously set goals for improved performance, personal or job qualifications

SECTION D Record specific work performance **DEFICIENCIES** or job behavior requiring improvement or correction. (Explain checks in Column d or e)

SECTION E Record specific **GOALS** or **IMPROVEMENT PROGRAMS** to be undertaken during next evaluation period.

SECTION F NAME(S) and TITLE(S) of person(s) who provided assistance and guidance to the employee and have given input to evaluation. (Please attach letters/comments.)

SUMMARY EVALUATION – Check Overall Performance:

- Fails to Meet Standards Needs Improvement
 Effective – Meets Standards Exceeds Standards

RATER:

 (Signature) (Date)

REVIEWER:

 (Signature) (Date)

I certify that this report has been discussed with me. I understand my signature does not necessarily indicate agreement and that I may respond in writing within 30 days.

EMPLOYEE:

 (Signature) (Date)

EMPLOYEE'S COMMENT:

INSTRUCTIONS FOR USE OF THE PERFORMANCE

EVALUATION REPORT FORM

GENERAL

1. Markings and comments shall be typed using the on-line form. The rater shall review the rating with the employee in a private interview. All signatures shall be in ink. The employee shall initial changes and corrections.
2. If space for comments is inadequate, similarly dated and signed attachments may be made (either typewritten or in ink).
3. Due dates shall be observed and are particularly important for probationary reports. Filing dates for these are flexible, and both the first and final reports may be filed at any time between their receipt and the printed date.
4. All probationers (either new-hire or promotional) shall be evaluated not later than the end of their second full month of probationary service and again after four full months, but not later than the end of the fifth month of such service. Probationers may be separated (or demoted, if permanent in a lesser class) at any time such action is deemed necessary by the principal or department head, through use of either a scheduled or an unscheduled performance evaluation report.
5. All permanent employees shall be evaluated annually as of the employee's employment date. Permanent employees may also be separated or demoted, provided that all District procedures are observed.
6. Unscheduled reports may be filed at any time for either permanent or probationary employees if such action is warranted. Evaluation other than the prescribed time shall have prior approval of the Personnel Director.
7. The "Guide to Performance Evaluation of Classified Employees" shall be consulted for suggestions, definitions, interpretations, and further instructions.
8. All performance evaluation reports in an employee's personnel department file are subject to review by principals or department heads whenever an employee has applied for transfer or promotion.

SECTION A Check (X) one column for each factor. Column (a) may be checked when a factor is not considered applicable to a particular job. Additional spaces have been provided to write in any additional factors. Each check mark in Column (b) requires specific explanation in Section B. Each check mark in Column (d) or(e) requires specific explanation in Section D.

SECTION B Describe outstanding qualities or performances, particularly when checking Column (b).

SECTION C Use to record progress or improvements in performance resulting from employee's efforts to reach previously set goals.

SECTION D Give specific reasons for check marks in Column (d) and (e). Record here any other specific reasons why the employee should not be recommended for permanent status, or—if employee is already permanent—any specific reasons for required improvement.

SECTION E Record agreed-upon or prescribed performance goals for the next evaluation period.

SECTION F Record the name(s) and title(s) of person(s) who have provided assistance and guidance to the employee and have given input to evaluation. (Please attach letters or comments from these people.)

SUMMARY EVALUATION

Check the overall performance here, taking into account all factors and total performance over the full period of service being evaluated.

FAILS TO MEET STANDARDS: Performance clearly inadequate in one or more critical factors as explained or documented in Section D. Total performance periodically or regularly falls short of normal standards.

NEEDS IMPROVEMENT: Performance weak in this area. Explain factors which need improvement in Section D.

EFFECTIVE—MEETS STANDARDS: Consistently competent performance meeting or exceeding standards in all critical factors for the position. If margin is narrow and standards barely met, explain in Section D. Most employees would be rated in this category.

EXCEEDS STANDARDS: Total performance is well above normal standards for the position. This evaluation should be reflected by marks for critical factors in Section A, and superior or excellent performance must be noted in Section B. Only a few employees would normally qualify for this rating.

SIGNATURES

The rater, the reviewer, and the employee shall date and sign the report. The employee's signature indicates that the conference has been held and that he/she has had an opportunity to read the report. If he/she refuses to sign for any reason, explain that his/her signature does not necessarily imply or indicate agreement with the report, and that space is provided for him/her to state any disagreement. Further refusal to sign shall be recorded on the report, after which it shall be forwarded.

APPEAL Evaluation reports express the judgment and opinions of supervisory authority, and as such are not subject to appeal unless there has been a resultant action taken to suspend, demote, or dismiss a permanent employee.