# MIAMI UNIFIED SCHOOL DISTRICT #40



# Classified Employee
# Performance Evaluation Process

Adopted 9-16

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## Classified Employee Performance Evaluation Process

## Introduction

Representatives from classified staff met to review the current evaluation tool and amend the current evaluation tool, process, and to create written guidelines for all staff as a tool in applying and understanding the process.  The following objectives have been established:

- The process should be constructive for employee development as well as performance evaluation purposes

- The process should be simple, understandable and usable for all involved

- The process should create a new rating system and eliminate the current system

It is hoped this performance evaluation guide is informative and helpful.  Should you have any questions or comments, please contact the District office.

# The Importance of Completing Written Performance Evaluations

The employee performance evaluation process is important because it defines and clarifies job duties and responsibilities, identifies performance standards and expectations, and evaluates, measures and documents job performance relevant to established criteria and provides feedback on employee strengths, achievements and areas for improvement. Additional significant reasons for employee performance evaluations systems are:

- To ensure performance standards and criteria are consistent with the Miami Unified School District's beliefs, values, policies and procedures

- To enhance communication between supervisor and employee

- To recognize and reinforce positive performance

# Preparing for the Performance Evaluation

The evaluator will plan in advance to all the evaluation to be a useful tool for recognizing strengths and addressing weaknesses.

**Time Limits:**

Employee Performance Evaluations for new employees are to be performed by the building principal/assistant principal/dean of student not less than twice during the probationary period, which shall be one calendar year in length. They are performed annually thereafter.

**Collecting Data:**

Regular communication: Effective performance evaluations are a result of an ongoing process that begins with regular communication between the evaluator and the employee. It is a manager's responsibility to provide honest and constructive feedback to employees in accomplishing goals to ensure that employees are apprised of their effectiveness and areas needing improvement as they occur.

# The Performance Evaluation Meeting

How the performance evaluation is conducted can be as important as the information that goes into the content of the form. Careful preparation and scheduling of the performance evaluation meeting may take a little time, but the results produced are worthwhile. The following is a list of items to consider in conducting a performance evaluation meeting:

- Pre-schedule a time to meet with the employee, giving the employee sufficient notice to prepare for the meeting.

- Be prepared. Review the employee's job description and review other resources related to the employee's job performance.

- Give your full attention to the evaluation meeting. Ensure that you are in a quiet place where you will not be interrupted. Create a positive atmosphere.

- Ask open-ended questions that require more than just "yes" or "no" responses.

- Give honest and constructive **work-related** feedback.

- Encourage an interactive discussion on the review and establishment of goals and objectives.

- Ask the employee what you can do to assist him or her to be successful.

- Discuss how you will follow-up with the employee.

- Close the meeting by thanking the employee for participating.

# Follow-Up Procedures

Evaluation of an employee's performance is an ongoing process. It is important to follow-up on items identified as areas for improvement, as well as goals and objectives that have been established. Here are some helpful hints to keep the momentum of the performance evaluation process continually moving forward:

- Communicate with employees often

- Solicit feedback and status on goals and objectives

- Discuss performance which needs improvement/correction as it happens

- Recognize proficient performance as it happens

- Be a coach and mentor to your employees

Remember, it is just as important to acknowledge that employees are doing something **RIGHT**, as to tell them that they need to improve.

# Instructions for Preparing and Completing the Report of Classified Employee Performance

**Purpose:** The Miami Unified School District Report of Employee Performance Evaluation is to be used for the evaluation of Classified employees. Evaluations are to be conducted twice during the employee's first year probationary period and annually thereafter. The evaluator may wish to evaluate an employee more often than the prescribed intervals. When doing so, the box labeled "Special" should be marked. If space is inadequate, the evaluator may attach extra sheets of paper to provide supporting comments.

**Section A – Performance Rating Key:** Write in the corresponding letter code for each factor. When a factor is not considered applicable to a particular position or when the evaluator has not been able to observe the behavior, the category may be recorded as Not Applicable (NA). Should the evaluator want to add comments, he/she may do so on a separate sheet of paper.

- **Highly Effective (HE):** Meets all normal requirements of the position in a competent manner. (Normally, this is the category most often used to describe acceptable performance.)
- **Effective E:** Overall performance is progressing toward a highly effective level.
- **Developing (D):** Total performance periodically or regularly falls short of expectations.
- **Ineffective (I):** Performance is clearly inadequate. Employee has demonstrated an inability or unwillingness to improve or meet expectations. Performance is not acceptable for position held.
- **Not Applicable (NA):** Does not apply to the job duties of the employee being evaluated.

**Section B – Job Strengths:** Record job strengths and proficient performance. Provide written examples. (Attach additional sheets of paper if necessary.)

**Section C – Progress Achieved:** Record progress achieved in attaining goals.

**Section D – Improvement or Correction:** Record specific required improvement or correction needed in performance or behavior; provide written examples. (Attach additional sheets of paper if necessary.)

**Section E – Goals:** Record agreed-upon or prescribed performance goals established for the next performance period. (Optional)

**Section F – For Probationary Employees:** Complete this section only if the employee is probationary. If the employee is not meeting all normal requirements for the position, at any time during the probationary period, he/she may be terminated from employment. If the evaluator wishes to recommend termination during the employee's probationary period, the evaluator must immediately notify the Superintendent to review the issues prior to determination of action to be taken.

# Guidelines to Evaluators and Employees For
# Completing the Report of Classified Employee Performance and
# Discussion with Employee

1. Prepare and initial draft of the Report of Classified Employee Performance.  Prior to meeting with the employee to discuss the draft Report, the evaluator may request that the employee complete a self-evaluation which will also be discussed during the performance evaluation review.  **NOTE:** If the evaluation reflects either "Developing" or "Ineffective" in any area, the evaluator must discuss the evaluation with the Superintendent prior to meeting with the employee.  A follow-up evaluation will be scheduled with the employee and evaluator 30 days after the initial evaluation to address any areas needing development or any areas of unacceptable performance.  **Exception:** If the employee's behavior presents an unsafe or unlawful environment, immediate action will be taken.

2. Provide the employee with a draft copy of the Report of Classified Employee Performance **prior to** a performance evaluation review and inform the employee of the date, time, place and purpose of the performance evaluation review.  During the review, the evaluator should encourage the employee to discuss his/her opinions and observations regarding the content of the draft written Report of Classified Employee Performance.

3. Upon completion of the performance evaluation review, the Report of Classified Employee Performance is completed in final form and signed by the evaluator and the employee.  **The employee may include comments on the form or may attach his/her written comments to the form, and return the Report to the evaluator.**  If the employee refuses or declines to sign the Report, the evaluator must indicate this under the EMPLOYEE'S ACKNOWLEDGEMENT section on the Report form.  Signature of the employee does not necessarily constitute agreement.

4. The completed Report of Classified Employee Performance is forwarded to the District Office for placement in the employee's personnel file.

# Performance Ratings, Definitions and Sample Behaviors

1. Observance of Work Hours
2. Attendance
3. Appropriate Attire and Grooming
4. Safety Practices
5. Operation and Care of Equipment
6. Job Knowledge
7. Job Skills
8. Adaptability and Flexibility
9. Impact
10. Quality of Work
11. Planning and Organizing
12. Problem Solving and Decision Making
13. Initiative
14. Oral Communication
15. Written Communication
16. Interpersonal Skills
17. Customer Service
18. Team Orientation

**1.** **Observance of Work Hours**
Complies with standards and understands importance of observing work hours in providing effective service.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**2.** **Attendance**
Complies with standards and understands importance of attendance in providing effective service.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**3.** **Appropriate Attire and Grooming**
Complies with Miami USD dress code and understands the importance of appropriate attire and grooming in representing the district.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**4.** **Safety Practices**
Complies with all safety regulations and procedures

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**5.     Operation and Care of Equipment**

Effectively and safely operates equipment, tools and/or machines.

☐ Highly Effective (4)     ☐ Effective (3)     ☐ Developing (2)     ☐ Ineffective (1)     ☐ N/A


**6.     Job Knowledge**

Understands the duties, responsibilities and expectations of the position.
Has knowledge of subject area and related policies, procedures and technical
expertise.  Uses information, materials, equipment and techniques
accurately, efficiently and appropriately.  Keeps current with legislation,
policies, procedures, and techniques as applicable to position.

☐ Highly Effective (4)     ☐ Effective (3)     ☐ Developing (2)     ☐ Ineffective (1)     ☐ N/A


**7.     Job Skills**

Effectively performs the work of the position and assigned area.  Has knowledge of the
duties and responsibilities of the assigned position.  Understands applicable work
methods, techniques, policies, procedures and systems.  Has a general understanding of
the organization's beliefs, values, services, policies and procedures.

☐ Highly Effective (4)     ☐ Effective (3)     ☐ Developing (2)     ☐ Ineffective (1)     ☐ N/A


**8.     Adaptability and Flexibility**

Adapts to changing circumstances, policies and procedures.  Works effectively during
periods of high activity and with varying personality styles, various issues and tasks.
Seeks out and utilizes available resources; listens and considers other points of view,
ideas and suggestions; learns and retains new information, policies and procedures.
Effectively handles a variety of situations, projects and assignments.

**Sample Behaviors:**

- Communicates ideas effectively to both individuals and groups.

- Adapts oral/written communication style to fit different personality styles.

- Achieves goals using a wide variety of means.

- Shifts temperament when work patterns require.

- Modifies a strongly held opinion in response to contrary evidence.

- Maintains effectiveness during change and/or when assigned a variety of responsibilities.

☐ Highly Effective (4)   ☐ Effective (3)   ☐ Developing (2)   ☐ Ineffective (1)   ☐ N/A

**9.   Impact**
Creates a positive impression on others; gains their respect and confidence; displays a positive and professional manner.

**Sample Behaviors:**
- Gains immediate attention and respect of others when receiving visitors or dealing with telephone inquiries.

- Represents the organization well when dealing with others.

- Displays confidence when dealing with others.

☐ Highly Effective (4)   ☐ Effective (3)   ☐ Developing (2)   ☐ Ineffective (1)   ☐ N/A


**10.   Quality of Work**
Shows attention to detail, accuracy, follow-through and thoroughness.  Complies with work and health safety rules and procedures.  Exercises good judgment and discretion in matters relative to sensitive or confidential issues.  Stays with a task or job until it is finished or no longer attainable; maintains effectiveness in spite of rejection or disappointment.  Works with appropriate level of independence.

**Sample Behaviors**

- Reviews and revises work before submitting for opinion or approval.

- Strives to improve work performance.

- Stays with a position or plan until the desired objective is achieved or is no longer viable.

☐ Highly Effective (4)   ☐ Effective (3)   ☐ Developing (2)   ☐ Ineffective (1)   ☐ N/A

**11.   Planning and Organizing**
Uses time efficiently.  Plans and organizes priorities so that goals can be accomplished. Keeps supervisor/principal advised of the status of projects and work assignments. Establishes specific action plans to achieve short and long-term goals.  Identifies key activities necessary to achieve goals; sets priorities: allocates proper amounts of time and resources to activities and maintains an awareness of inter-relationships between activities.  Demonstrates ability to coordinate numerous projects at any given time.

**Sample Behaviors:**

- Develops a planning timetable; realistically schedules the steps involved.

- Understands and applies Miami Unified School District beliefs and values when setting own goals and objectives.

- Identifies factors critical to effective plan implementation; considers contingencies and potential consequences.

- Considers how best to attain desired goals with available resources.

- Seeks others' opinions when developing plans.

- Balances information-gathering with action-taking.

- Uses a calendar to schedule activities as appropriate.

- Keeps a "to-do" list.

- Maintains a list of issues to discuss with others.

- Ensures that the appropriate material/information is available when needed.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

12. **Problem Solving and Decision Making**
Analyzes situations effectively. Evaluates alternative courses of action and makes a logical decision; uses good judgment and common sense in making decisions. Takes appropriate action in a timely manner. Anticipates events and responds appropriately. Recognizes problems and develops alternative solutions.

**Sample Behaviors:**

- Problem solving:
- Responds to supervisors/principals concerns.

- Sets own priorities.

- Makes sound decisions during supervisor's absence and/or actively seeks counsel in the absence of the supervisor.

- Obtains as much information as possible before making a decision.

- Informs supervisor/principal of important work or emergencies.

- Decision making:

- Makes quick decisions when necessary.

- Knows which decisions can be made alone and which require consultation with others; acts accordingly.

- Recognizes confidentiality before sharing with others.

- Makes decisions with a minimal amount of deliberation, when needed.

☐ Highly Effective (4)　　☐ Effective (3)　　☐ Developing (2)　　☐ Ineffective (1)　　☐ N/A

**13.　Initiative**
Employee is a self-starter (rather than passive) in influencing events and achieving job goals, takes action beyond explicit job responsibilities; sets high performance goals and originates action rather than just responding to the action of others.  Generates innovative ideas, approaches and solutions.  Seeks new challenges, self-development and learning opportunities.

**Sample Behaviors:**

- Makes self-development efforts.

- Collects extra information for supervisor/principal because it may be useful.

- Makes suggestions without being asked; recommends solutions once a problem is identified; suggests changes or new programs; looks for ways to improve efficiency and effectiveness; tries new methods and ways of accomplishing job tasks.

- Investigates alternatives before deciding on one approach; digs beneath the obvious to get the facts.

- Does more than is minimally required on a project or task.

- Takes action on a project without being asked.

- Shows interest in learning about programs not in his/her area of responsibility.

- Takes action to avoid problems, overcome obstacles and achieve goals.

☐ Highly Effective (4)　　☐ Effective (3)　　☐ Developing (2)　　☐ Ineffective (1)　　☐ N/A

14. **Oral Communication**
Effectively gives and receives information in individual and group situations. Speaks in a clear, distinct and understandable manner. Explains department procedures, services, programs and activities effectively. Listens attentively to what supervisors have to say and can elicit valuable information from others.

**Sample Behaviors:**

When communicating with others:

- Maintains a balance between telling and listening.

- Attempts to understand the situation from all points of view.

- Suspends judgment until all points of view are fully explained/understood.

- Is sensitive to nonverbal communication, choice of words and use of physical space.

- Focuses upon facts rather than interpretations or inferences.

- Checks own understanding of what others are saying, e.g. paraphrasing.

- Expresses information in a clear succinct manner.

- Gives conscious attention to the dissemination of information to others.

    When participating in meetings:

- Arrives prepared and on time; submits ideas for consideration; clearly states opinions; seeks clarification; listens attentively.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

15. **Written Communication**
Written expression is clear, accurate, concise and conveys the desired message. Writing style is tailored to the varying forms of communication, (instruct, persuade, inform) and the audience. Summarizes a set of facts or ideas so that they are logical, coherent and clear. Composes letters and memos, using appropriate grammar, vocabulary and sentence structure.

**Sample Behaviors:**

- Defines the audience and determines the purpose of the message.

- Researches the subject at hand.

- Uses words, punctuation and writing style that allow the reader to easily, quickly and effectively understand the intended message.

- Maintains the central idea or theme.

- Ensures that the ready understands exactly what is expected of him/her.

- Refrains from overstating and underwriting.

- Reviews/revises written material to ensure accuracy, proper grammar, style, readability and quality.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**16.    Interpersonal Skills**
Assists and works well with others including members of the public, peers or supervisors with genuine interest and desire.  Deals effectively and functions cooperatively with others.  Treats others in a fair, consistent and non-judgmental manner.  Remains calm under difficult and/or pressure situations.

**Sample Behaviors:**

- Recognizes others as individuals, shows respect for their beliefs/values and contributions and treats each with equality and understanding.

- Accepts others' different styles; understanding their strengths and limitations.

- Makes every effort to put people at ease.

- Tries to understand how he/she is perceived by others.

- Solicits feedback from others in an effort to improve self.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**17.    Customer Service**
Is polite, professional and respectful of others.  Improves the quality and efficiency of services.  Actively listens and conveys understanding of customers' requests such that their needs can be anticipated and satisfied.  Openly communicates needs and problems; displays sensitivity to their sense of urgency.

**Sample Behaviors:**

- Talks with internal/external customers to assess concerns; recovers effectively from customer dissatisfaction.

- Anticipates problems that others may not have identified themselves.

- Resolves internal/external customers concerns and complaints; displays sensitivity to their sense of urgency.

- Communicates empathy and builds rapport with internal/external customers; conveys trust and assurance.

- Does follow-up to ensure that a complaint or concern has been resolved.

☐ Highly Effective (4)    ☐ Effective (3)    ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

**18.    Team Orientation**
Establishes and maintains effective working relationships.  Accomplishes tasks by working with others and being an effective team player; recognizes how his/her decisions may impact others; seeks input from others.  Participates constructively in team efforts.

**Sample Behaviors:**

- Recognizes and considers how their decisions affect others.

- Helps solve problems.

- Utilizes resources within various organizations to accomplish tasks.

- Recognizes how others view them; adjusts work interactions accordingly.

- Identifies where others stand on an issue.
☐ Highly Effective (4)    ☐ Effective (3) ☐ Developing (2)    ☐ Ineffective (1)    ☐ N/A

# Definition of Rating Scale

**Highly Effective:**

- Performance exceeds the requirements of the position

- Displays high degree of self-motivation.

- Consistently generates output of superior quality.

**Effective:**

- Performance is adequate for the requirement of the position; meets expectations of the job.

- Self-motivation confined to accomplishing assigned tasks.

- Generates output of acceptable quality.

**Developing:**

- Performance is not of the quality expected of the position; frequently falls short of job expectations.

- Frequently lacks motivation to complete assigned tasks.

- Frequently generates output of poor quality.

**Ineffective:**

- Performance is definitely inadequate for the position; consistently falls short of job expectations.

- Lacks self-motivation.

- Consistently generates output of inferior quality.

# Performance Rating Report

Employee _____          Department _____

Supervisor _____          Date of Rating _____

**Rating Scale**

Highly Effective 72 -–55
Effective 54-37
Developing 36 – 19
Ineffective 18 and below

        **Total Score** _____

        ☐ **Highly Effective**    ☐ **Effective**   ☐ **Developing**     ☐ **Ineffective**

**Comments:**

1. What are the employee's strengths?  (Highly Effective ratings must be explained in this space.)

2. What are the employee's weaknesses?  (Developing or Ineffective ratings must be explained in this space.)

3. General Comments:

**I have discussed this performance rating report with the evaluator.**

Employee's Signature_____          Date _____

Evaluator's Signature _____          Date _____