

CLASSIFIED EMPLOYEE PERFORMANCE EVALUATION HANDBOOK

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I EVALUATION OVERVIEW

Classified evaluation is a year-long process designed to improve employee performance, create a more efficient operation, strengthen the communication between the employee and the supervisor, and provide a forum to discuss an employee's professional growth.

The annual cycle concludes, and the next cycle begins with a conference between employee and supervisor. Essential elements of the process include:

- A review of the employee's job assignment
- A review of the employee's job description
- The establishment of employee performance goals, if required
- Review of the evaluation process

Informal observations may occur anytime, formal observations will be scheduled in advance.

The summary conference (at the end of the probationary period or by June 30) includes:

- A review of the employee's job performance
- A review of progress toward meeting employee's goals, if required
- A summary recorded on the [Classified Employee Evaluation Form](#)
- Employee and supervisor signatures to indicate the results have been discussed
- Employee notification that they may attach a letter, explanation or rebuttal

Upon request of an employee, the evaluation will be discussed in a conference with the supervisor and supervisor's superior.

II DEFINITIONS & KEY TERMS

Levels of Performance: These four levels of performance assist the employee and supervisor in gauging performance progress. Employees are encouraged to seek progress across the continuum listed as levels of performance.

These levels indicate the performance of classified employees ranging from those who are striving to master the basics of the job to those who are highly accomplished professionals who are able to share their expertise with colleagues.

DOES NOT MEET: The employee's performance is insufficient to meet the standards. Performance is unacceptable at this level.

OCCASIONALLY MEETS: The employee demonstrates a basic understanding of the standards. The employee requires close supervision and needs to improve to meet all standards consistently.

PROFICIENT: The employee consistently demonstrates application of the standards as evident through their work performance. The terms "regularly," "often," and "is evident" are words that describe an employee's performance at the proficient level.

EXCEPTIONAL: The employee consistently surpasses standards as evident through their work performance.

Performance Elements: Definitions of the individual areas under each standard and part of the framework for observing and evaluating job-related practice.

Performance Evaluation: A process completed annually for all classified employees. To be completed at the end of 120 calendar days for probationary classified employees. To be completed by the end of June for regular classified employees.

Performance Matrix: A description of each of the performance standards and the components on which supervisors can identify the current level of performance and target areas for professional growth. Levels of performance are presented for each component.

Performance Observation: To facilitate a well-rounded evaluation, supervisors may ask staff or clients who are familiar with the employee's work to provide input. Input will be returned to a supervisor on the [Data Collection Form](#). The supervisor determines if the input is relevant and if it is to be included (without attribution) in the Performance Evaluation.

Performance Standards: Four major areas of district expectations described as JOB KNOWLEDGE and SKILLS, COMMUNICATION and INTERPERSONAL SKILLS, JOB PERFORMANCE, and PROFESSIONALISM. These standards form the basis of supervision and the evaluation of the performance of classified employees.

Summary Conference: The conference between the supervisor and the employee to discuss performance based on the standards and individual elements. The employee should be prepared to share performance progress they believe they have demonstrated. The supervisor will share their performance evaluation.

Supervisor: The person responsible for the evaluation of employees within his/her department. The supervisor must be an employee who is not in the bargaining unit.

III RESPONSIBILITIES

EMPLOYEE: Each classified employee will receive the [Classified Employee Performance Evaluation Handbook](#) when hired or at the beginning of their work calendar. It is the responsibility of each employee to read the handbook, address any concerns with their supervisor, and follow and complete the evaluation process as outlined.

ASSOCIATION: It is the association's responsibility to inform classified employees of any specific contract language regarding evaluation and professional growth, inform employees of their rights and responsibilities, and be available to answer questions.

SUPERVISOR: The supervisor will complete employee evaluations in accordance with the guidelines specified in the [Classified Employee Performance Evaluation Handbook](#). Supervisors will inform probationary employees when the 180 calendar days evaluation is due and will be available to assist new employees with performance goals or expectations. Supervisors will specifically refer to the framework and the descriptions in the standards and employee's job description when writing an evaluation. Supervisors assessing employees who are placed in other school district buildings are encouraged to communicate with building administrators, staff or parents during the course of an evaluation cycle. The supervisor may solicit input from others who are familiar with the employee's work.

HUMAN RESOURCES: The HR office will provide staff, funds, and necessary resources to produce, print, distribute and electronically host the [Classified Employee Performance Evaluation Handbook](#) including forms, calendars, evaluations and necessary documents.

BOARD: The CESD Board will monitor the professional growth and evaluation system to improve staff effectiveness and performance related to CESD goals.

IV Performance Evaluation System

TIMEFRAME	PROBATIONARY EMPLOYEE	REGULAR EMPLOYEE	SUPERVISOR
At orientation or the beginning of work calendar	Receive and review Classified Employee Performance Evaluation Handbook	Receive and review Classified Employee Performance Evaluation Handbook	
Within 90 calendar days			Complete 1 st probationary observation
Within 180 calendar days			Complete 2 nd probationary observation and make recommendation
By June 30			Complete regular observation and make recommendation

PERFORMANCE STANDARDS

STANDARD 1: JOB KNOWLEDGE and SKILLS

- 1.a Prioritizes and organizes tasks effectively
- 1.b Completes work within time limits
- 1.c Displays initiative

STANDARD 2: COMMUNICATION and INTERPERSONAL SKILLS

- 2.a Follows instructions, and asks questions when needed
- 2.b Responds to requests in a timely manner with complete information
- 2.c Collaborates with others to complete tasks and solve problems
- 2.d Communicates effectively and in a professional manner

STANDARD 3: JOB PERFORMANCE

- 3.a Performs job procedures and responsibilities
- 3.b Obtains and maintains appropriate certifications and training
- 3.c Demonstrates interest in professional development
- 3.d Displays neatness, accuracy and skillfulness
- 3.e Demonstrates task-oriented work habits
- 3.f Identifies and uses resources efficiently and effectively
- 3.g Monitors/maintains appropriate documentation, records, email and calendars
- 3.h Demonstrates an ability to work independently
- 3.i Adapts to and exhibits flexibility with changes in tasks, assignments, locations

STANDARD 4: PROFESSIONALISM

- 4.a Attendance record demonstrates reliable work attendance and punctuality
- 4.b Exhibits professional demeanor, including dress, grooming and language
- 4.c Shows discretion, confidentiality and proper safeguard of sensitive information
- 4.d Practices safety in the workplace and adheres to safety expectations
- 4.e Makes sound decisions under normal as well as unusual circumstances
- 4.f Provides direction and/or demonstrates responsibility as the need arises
- 4.g Models CESD staff ethics and maintains professional relationships with others
- 4.h Shares job knowledge and experience to promote the department's efficiency

PERFORMANCE MATRIX

STANDARD 1: Job Knowledge and Skills	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
1.a Prioritizes and organizes tasks effectively	Lack of planning creates problems. Organizational skills are lacking. Procrastination results in failure to meet work goals.	Requires support in organization, setting work goals and priorities. Occasionally monitors progress or makes adjustments.	Regularly anticipates challenges and opportunities to set work goals and priorities. Organization meets expectations for the position.	Consistently anticipates challenges and opportunities and sets work goals and priorities. Organizes work at a level exceeding expectations and maximizes productivity.
1.b Completes work within time limits	Assigned tasks are rarely completed by expected deadlines. Appropriate priorities are not maintained. Structure and organization are lacking.	Occasionally completes assigned tasks in a timely and useful manner. May need support to prioritize and structure daily work.	Regularly prioritizes tasks and completes work on time. Prioritizes and structures daily work.	Consistently anticipates work needs and completes assigned tasks prior to deadlines. Assignments are completed in advance of projected deadlines
1.c Displays initiative	Work is not completed without close supervision and direction. Tasks other than those directly assigned are either avoided or overlooked.	Completes assigned work with some direction. With supervision and direction, will perform other tasks when assigned.	Demonstrates ability to accomplish tasks with little or no direction. When assigned work is completed, does other tasks when asked.	Consistently self-monitors and self-directs. Alert to opportunities to improve methods and skills. When assigned work is completed, takes on additional tasks without waiting to be asked.
STANDARD 2: Communication and Interpersonal Skills	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
2.a Follows instructions, and asks questions when needed	Instructions are not followed. Attentiveness in communication is lacking and questions are not asked.	Follows some instructions. Occasionally listens carefully, may or may not ask questions when needed.	Accurately follows instructions. Listens carefully and asks questions when needed.	Assists others to follow instructions. Checks for understanding and anticipates questions needing answers.
2.b Responds to requests in a timely manner with complete information	Requests are rarely responded to, or the response is incomplete.	Occasionally responds to requests in a timely and complete manner.	Consistently responds to requests in a timely manner and provides complete information.	Anticipates requests and provides needed information before it is requested.
2.c Collaborates with others to complete tasks and solve problems	There is little or no collaboration.	Occasionally collaborates with others, but not as often as needed.	When appropriate, collaborates with others to complete tasks and solve problems.	When appropriate, initiates collaboration with others in order to complete tasks and solve problems.
2.d Communicates effectively and in a professional manner	Communication lacks more than one of the following qualities: courtesy, tact, or constructive manner.	Communication lacks one of the following qualities: courtesy, tact, or constructive manner. Occasionally avoids open communication.	Communicates with courtesy, tact, and constructive manner to all. Contributes to open communication.	Models exceptional communication skills Initiates and maintains open communication.

STANDARD 3: Job Performance	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
3.a Performs job procedures and responsibilities	Fails to perform job procedures and responsibilities or requires considerable assistance to accomplish work assignments.	Occasionally completes assigned work and often needs direction to complete assigned work.	Regularly completes work assignments. When new procedures or processes are introduced, quickly learns them and begins efficient application.	Work assignments are always completed on time and to very high standards. Takes initiative in seeking out and completing tasks without direction. Serves as a reliable resource to others regarding work processes and procedures, Strives to improve processes, procedures, and routines.
3.b Obtains and maintains appropriate certifications and training	Required licenses, certifications, and training have not been obtained or maintained.	Is in the process of obtaining or maintaining the licenses, certifications, and training required for the position.	Obtains or maintains all licenses, certifications, and training required for the position.	Obtains and maintains value-added licenses, certifications, and training beyond that which is required for the position.
3.c Participates in professional development activities	Rarely participates in workshops and/or training activities. Performance goals are either not set or achieved.	Occasionally participates in workshops and /or training activities. Occasionally sets and/or achieves performance goals.	Frequently participates in workshops and /or training activities. Frequently sets and achieves performance goals.	Actively seeks out and participates in workshops and training activities. Consistently sets and achieves performance goals.
3.d Displays neatness, accuracy and skillfulness	Work produced is of unacceptable quality. Work frequently needs to be redone. Work is rarely accurate, neat, or thorough.	Inconsistently produces work that meets quality and expectations for neatness and accuracy. Work occasionally needs to be redone.	Produces work that meets quality expectations for neatness and accuracy. Work rarely needs to be modified. Demonstrates ability to meet work quality standards.	Consistently produces work of high quality, exceeding expectations for accuracy and detail. Work is completed accurately. Consistently exhibits skill in achieving work quality standards.
3.e Demonstrates task-oriented work habits	Tasks are not completed or are rarely completed without close supervision.	Occasionally distracted from tasks. Often needs reminders to complete assigned tasks. Seldom accomplishes more than assigned work.	Completes assigned tasks. Usually accomplishes more than assigned work.	Seeks other tasks when assigned work is completed. Consistently accomplishes more than assigned work.
3.f Uses resources efficiently and effectively	Wastes time and resources.	Occasionally uses resources efficiently and effectively.	Consistently uses resources efficiently and effectively.	Models effective and efficient use of time and resources.
3.g Monitors and maintains appropriate documentation, records, email and calendars	Documentation, records, email and calendars are usually late and/or incomplete.	Occasionally monitors and maintains appropriate documentation, records, email and calendars.	Regularly monitors and maintains appropriate documentation, records, email and calendars.	Takes responsibility for devising and improving record-keeping, documentation and correspondence.
3.h Demonstrates an ability to work independently	Does not work independently.	Occasionally effective working independently with little supervision.	Usually effective working independently with little supervision.	Consistently effective working independently without supervision.

STANDARD 3: Job Performance	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
3.i Adapts to and exhibits flexibility with changes in tasks, assignments and locations	Resists changes in tasks, assignments and locations. Ignores suggestions to implement changes in responsibilities, methods and procedures. Flexibility is not demonstrated in response to special circumstances.	Occasionally adapts to changes in tasks, assignments and locations or accepts suggestions to implement changes in responsibilities, methods and procedures. Occasionally demonstrates flexibility in order to accommodate special circumstances.	Readily adapts to changes in tasks, assignments and locations. Accepts suggestions to implement changes in responsibilities, methods and procedures. Demonstrates flexibility in order to accommodate special circumstances.	Responds confidently to the demands of work when confronted with change, adversity and other challenges. Models a positive response to change.
STANDARD 4: Professionalism	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
4.a Attendance record demonstrates reliable work attendance and punctuality ** As used in this standard, "absences" do not include leave for vacation, FMLA, bereavement, or workers compensation	** Absences exceed 10 in less than six months, and/or tardiness is frequent and interferes with job performance. Proper notification of absence or lateness in not given. Leave and reporting procedures are not followed.	**Absences exceed 10 within six months, and/or tardiness is frequent and may interfere with job performance. Occasionally absent or tardy without proper notification. Inconsistently complies with eave and reporting procedures. Develops a pattern of use with sick leave and/or unpaid personal leaves.	** Absences do not exceed 10 for the year. Proper notification of absence is given. Appropriately and prudently uses leave, adhering to district leave policies.	Attends scheduled workdays and adheres to all expectations. Leave and reporting procedures are followed 100% of the time. Demonstrates exemplary attendance and punctuality.
4.b Exhibits professional demeanor, including dress, grooming and language	Lacks appropriate and professional demeanor including dress, grooming, hygiene, and language.	Occasionally exhibits professional demeanor appropriate to the position, including dress, grooming, hygiene, and language.	Exhibits professional demeanor appropriate to the position, including dress, grooming, hygiene, and language.	Models professional demeanor appropriate to the position, including dress, grooming, hygiene and language.
4.c Shows discretion, confidentiality and proper safeguard of sensitive information	Discretion is not exercised. Fails to safeguard confidential and/or privileged information.	Occasionally exercises discretion. Unreliably safeguards confidential and/or privileged information.	Regularly exercises discretion and safeguards confidential and/or privileged information.	Models discretion and reliably safeguards confidential and/or privileged information and reminds others to do the same.
4.d Practices safety in the workplace and adheres to safety expectations	Fails to practice safety in the workplace or adhere to safety expectations.	Occasionally practices safety in the workplace and adheres to safety expectations.	Consistently practices safety in the workplace and adheres to safety expectations.	Assists and models for others safety in the workplace and adherence to safety expectations.
4.e Makes sound decisions under normal as well as unusual circumstances	A lack of judgment is frequently apparent.	Occasionally makes sound decisions, anticipates needs, and uses good judgment.	Consistently makes sound decisions, anticipates needs, and uses good judgment.	Uses good judgment and assists or models for others the use of these skills.
4.f Provides direction and/or demonstrates responsibility as the need arises	Fails to provide directions or demonstrate responsibility.	Sometimes provides and/or demonstrates responsibility.	Usually demonstrates responsibility, following up to ensure success.	Assists and models for others the use of these skills to ensure success

STANDARD 4: Professionalism	LEVEL of PERFORMANCE			
	Does not Meet	Occasionally Meets	Proficient	Exceptional
4.g Adheres to CESD values and ethical behaviors and maintains professional relationships with others	Treatment of others lacks civility, fails to value diversity and/or promotes rather than resolves conflict. Professional and public relationships are not developed or maintained.	Inconsistently treats others with civility, does not always value diversity or resolve conflicts professionally. Inconsistently develops and maintains professional relationships with colleagues and the public.	Usually treats others with civility and respect, values diversity and resolves conflicts professionally. Usually develops and maintains professional relationships with colleagues and the public.	Consistently treats others with civility and respect, values diversity and resolves conflicts professionally. Consistently develops and maintains professional relationships with colleagues and the public.
4.h Shares job knowledge and experience to promote the department's efficiency	Job knowledge and experience are not shared with others.	Occasionally shares job knowledge and experience with others.	Consistently shares job knowledge and experience with others.	Models sharing job knowledge and experience with others.

DATA COLLECTION FORM for CLASSIFIED EMPLOYEES

Performance Observation: To facilitate a well-rounded evaluation, supervisors may ask staff or clients who are familiar with the employee's work to provide input. Input will be returned to a supervisor on the [Data Collection Form](#). The supervisor determines if the input is relevant and if it is to be included (without attribution) in the Performance Evaluation.

Supervisor: _____ (date)

Employee Being Evaluated: _____ -- _____ (assignment)

Person Completing Form: _____ -- _____ (relationship)

Instructions:

Following is a list of standards that are used to evaluate CESD classified employees. Please provide comments only on the standards for which you have first-hand knowledge. Return the form directly to the supervisor listed above.

STANDARD 1: JOB KNOWLEDGE and SKILLS

- 1.a Prioritizes and organizes tasks effectively
- 1.b Completes work within time limits
- 1.c Displays initiative

Comments:

STANDARD 2: COMMUNICATION and INTERPERSONAL SKILLS

- 2.a Follows instructions, and asks questions when needed
- 2.b Responds to requests in a timely manner with complete information
- 2.c Collaborates with others to complete tasks and solve problems
- 2.d Communicates effectively and in a professional manner

Comments:

STANDARD 3: JOB PERFORMANCE

- 3.a Performs job procedures and responsibilities
- 3.b Obtains and maintains appropriate certifications and training
- 3.c Demonstrates interest in professional development
- 3.d Displays neatness, accuracy and skillfulness
- 3.e Demonstrates task-oriented work habits
- 3.f Identifies and uses resources efficiently and effectively
- 3.g Monitors/maintains appropriate documentation, records, email and calendars
- 3.h Demonstrates an ability to work independently
- 3.i Adapts to and exhibits flexibility with changes in tasks, assignments, locations

Comments:

STANDARD 4: PROFESSIONALISM

- 4.a Attendance record demonstrates reliable work attendance and punctuality
- 4.b Exhibits professional demeanor, including dress, grooming and language
- 4.c Shows discretion, confidentiality and proper safeguard of sensitive information
- 4.d Practices safety in the workplace and adheres to safety expectations
- 4.e Makes sound decisions under normal as well as unusual circumstances
- 4.f Provides direction and/or demonstrates responsibility as the need arises
- 4.g Models CESD staff ethics and maintains professional relationships with others
- 4.h Shares job knowledge and experience to promote the department's efficiency

Comments:

For Supervisor's Working File Only

CLASSIFIED PERFORMANCE EVALUATION FORM

Employee Name: _____ Date: _____

Employee ID#: _____ Job ID#: _____

Probationary, 6-month evaluation Regular Status, annual evaluation

Standard 1: JOB KNOWLEDGE and SKILLS	N/A	Does Not Meet	Occasionally Meets	Proficient	Exceptional
1.a Prioritizes and organizes tasks effectively	<input type="checkbox"/>				
1.b Completes work within time limits	<input type="checkbox"/>				
1.c Displays initiative	<input type="checkbox"/>				
Comments:					
Standard 2: COMMUNICATION and INTERPERSONAL SKILLS	N/A	Does Not Meet	Occasionally Meets	Proficient	Exceptional
2.a Follows instructions, and asks questions when needed	<input type="checkbox"/>				
2.b Responds to requests in a timely manner with complete information	<input type="checkbox"/>				
2.c Collaborates with others to complete tasks and solve problems	<input type="checkbox"/>				
2.d Communicates effectively and in a professional manner	<input type="checkbox"/>				
Comments:					
Standard 3: JOB PERFORMANCE	N/A	Does Not Meet	Occasionally Meets	Proficient	Exceptional
3.a Performs job procedures and responsibilities	<input type="checkbox"/>				
3.b Obtains and maintains appropriate certifications and training	<input type="checkbox"/>				
3.c Demonstrates interest in professional development	<input type="checkbox"/>				
3.d Displays neatness, accuracy and skillfulness	<input type="checkbox"/>				
3.e Demonstrates ownership and task-oriented work	<input type="checkbox"/>				
3.f Identifies and uses resources efficiently and effectively	<input type="checkbox"/>				
3.g Monitors/maintains appropriate documentation, records, email and calendars	<input type="checkbox"/>				
3.h Demonstrates an ability to work independently	<input type="checkbox"/>				
3.i Adapts to and exhibits flexibility with changes in tasks, assignments, locations	<input type="checkbox"/>				
Comments:					

Standard 4: PROFESSIONALISM	N/A	Does Not Meet	Occasionally Meets	Proficient	Exceptional
4.a Attendance record demonstrates reliable work attendance and punctuality	<input type="checkbox"/>				
4.b Exhibits professional demeanor, including dress, grooming and language	<input type="checkbox"/>				
4.c Shows discretion, confidentiality and proper safeguard of sensitive information	<input type="checkbox"/>				
4.d Practices safety in the workplace and adheres to safety expectations	<input type="checkbox"/>				
4.e Makes sound decisions under normal as well as unusual circumstances	<input type="checkbox"/>				
4.f Provides direction and/or demonstrates responsibility as the need arises	<input type="checkbox"/>				
4.g Models CESD staff ethics and maintains professional relationships with others	<input type="checkbox"/>				
4.h Shares job knowledge and experience to promote the department's efficiency	<input type="checkbox"/>				
Comments:					

Progress made during the evaluation period:

Goal(s) to consider for the next evaluation period:

Supervisor Recommendation:

- Probationary to Regular status
- Probationary extended by agreement
- Probationary to termination
- Regular status with plan for improvement
- Regular status continued

Signatures indicate that the supervisor has shared the evaluation results with the employee:

 * Employee Signature Date Supervisor Signature Date

* The employee may attach their own letter, explanation or rebuttal

Original: HR Personnel file

Copy: Employee

Copy: Supervisor

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