

PERFORMANCE EVALUATIONS

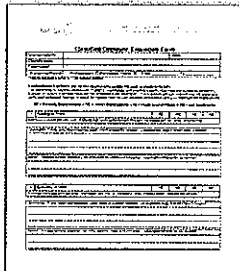


PURPOSE

- ASSIST
 - Employees achieve maximum work performance
 - Discuss and establish performance goals & work objectives
- IDENTIFY
 - Sub-standard performance
- RECOGNIZE
 - Achievements of employees
- DOCUMENTATION
 - Records employee performance for evaluation period

PERFORMANCE EVALUATION FORM

- Current form approved by CSEA and the District
- Evaluation of classified, confidential & supervisory employees
- No editing of form
- Accessible via employee website
 - <http://inside.mtsac.edu>



EVALUATION DUE DATES

- PROBATIONARY ASSESMENT
 - * Address positive performance and/or areas of improvement
 - * Important language documenting employee's status
- PERMANENT YEARLY
 - * Evaluation period should cover last twelve month period or specified period
 - * Not to exceed twelve months

EVALUATION REMINDERS

- HR to e-mail monthly reports for each manager
- Upcoming reports to reflect last evaluation on file

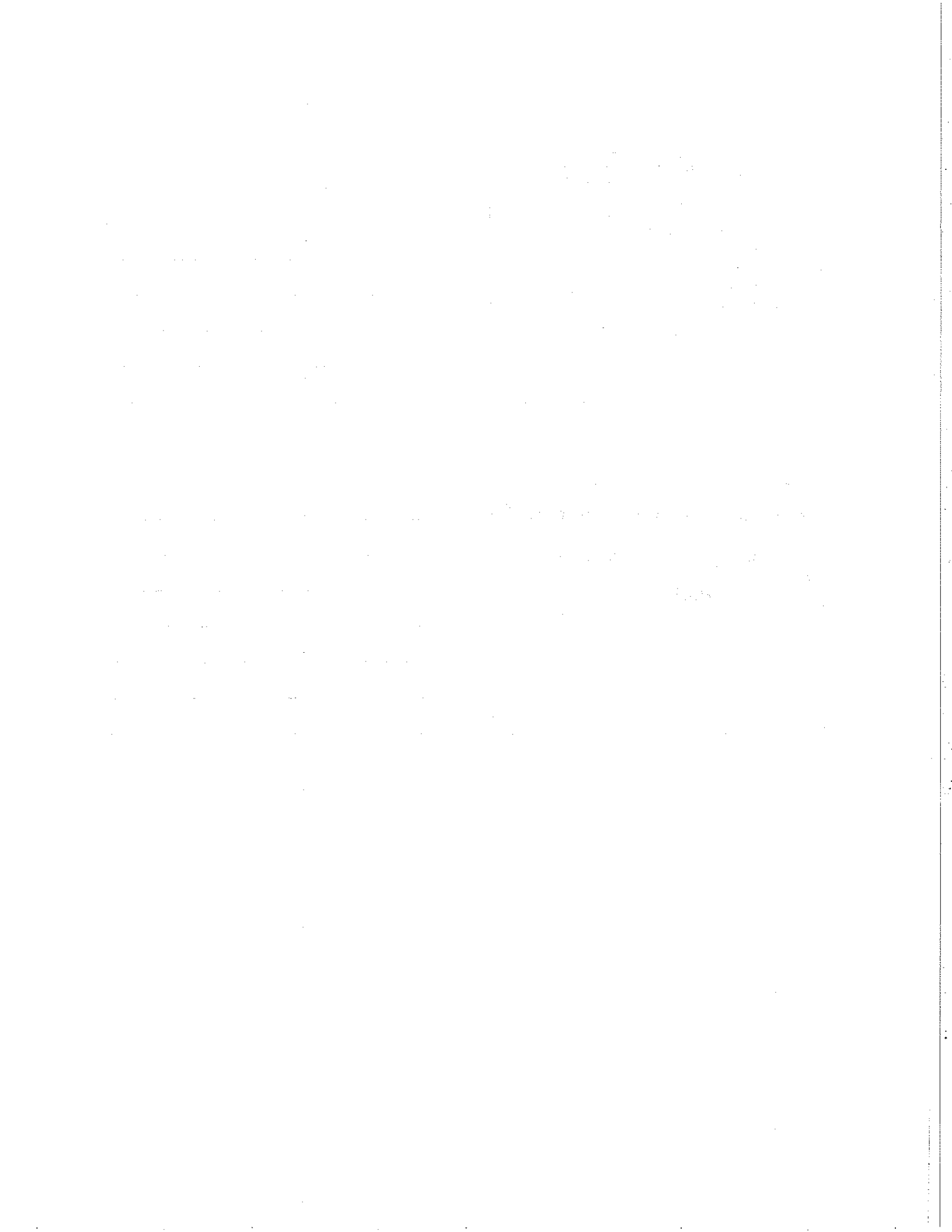
PERFORMANCE EVALUATION MEETING

- Minimum two days notice prior to any scheduled evaluation meeting
 - * Provide completed evaluation prior to meeting
- Discussion of questions or issues during meeting
- Both parties sign
 - * Employee rebuttal may submitted to HR within 15 working days
- Provide signed copy of evaluation
- Submit completed evaluation to HR

**REVIEW OF PERFORMANCE
EVALUATION**

- HR will review completed performance evaluations and file in employee's personnel file
- If any revisions are required, evaluation will be returned to manager
 - Manager and employee should sign revised evaluation

**What questions do
you have?**





PERFORMANCE EVALUATIONS

OVERVIEW

Performance evaluations are an excellent tool to address employee developmental goals, achievements and address performance issues. When conducted correctly, performance evaluations may promote and support individual, team, and organizational effectiveness, achievement and growth that align with the employer's overall mission.

These are guidelines for conducting and completing performance evaluations for classified, confidential and supervisory employees.

PURPOSE

The purpose of employee performance evaluations is to:

- Assist individual employees in achieving maximum work performance by discussing and establishing performance goals and work objectives and reviewing progress toward achieving them;
- Identify and document sub-standard performance;
- Recognize the achievements and exemplary accomplishments of employees and
- Serve as a record of the employee's performance for the period of evaluation.

THE EVALUATOR

Performance evaluations should typically be conducted by an employee's direct manager. A supervisory employee may conduct a performance evaluation under the guidance and approval of the direct manager.

PERFORMANCE EVALUATION FORM

The performance evaluation tool is a mandated subject between the collective bargaining units and the District as such, once approved it cannot be edited or altered in any way. In fact to do so, could be seen as a violation of the collective bargaining unit and might subject the District to an unfair labor charge. The approved form is located on-line at <http://inside.mtsac.edu>.

Each section should be addressed thoroughly and the listed instructions on the evaluation form should be followed accordingly. The form is also used to evaluate confidential and supervisory employees.

EVALUATION DUE DATES

PROBATIONARY EMPLOYEE ASSESSMENT

The last step in the selection process is the probationary period. During that time, the manager must assess whether or not the probationary employee has demonstrated competency in the requisite skills, knowledge, ability and character necessary to successfully become a regular permanent employee.

PROBATIONARY EVALUATIONS

Managers should complete regular evaluations during an employee's probationary period. This provides the probationary employee with a clear understanding of any areas of improvement and plans to correct such deficiencies. Additionally, this is a best HR practice.

PERMANENT YEARLY

An employee's performance evaluation should cover the last twelve (12) month period or, a specified period indicated on the current evaluation form, but not to exceed twelve (12) months.

EVALUATION REMINDERS

Human Resources will send a monthly report (via e-mail) to each manager with an attached report indicating employees' evaluation due dates. While Human Resources tracks evaluations on file, managers should also keep track of evaluation due dates for the employees under their direction.

PERFORMANCE EVALUATION MEETING

The following are guidelines for the Performance Evaluation Meeting:

- Give the employee a minimum of two (2) days notice prior to any scheduled evaluation meeting;
- Provide the employee with the completed evaluation within a minimum of two (2) days prior to the scheduled evaluation meeting;
- Discuss the performance evaluation form in its entirety;
- Performance evaluation form should be signed by both the manager and employee;
- Provide employee with a signed copy of the performance evaluation and
- Submit the completed performance evaluation form to Human Resources within five (5) working days.

Signing the performance evaluation form does not constitute the employee's agreement with the performance evaluation. If the employee would like to submit a rebuttal to the performance evaluation, they may do so and must submit it to the Office of Human Resources within a minimum of fifteen (15) working days. The rebuttal is then attached to the performance evaluation form and placed in the employee's personnel file.

REVIEW OF PERFORMANCE EVALUATION

All performance evaluations submitted to Human Resources are reviewed and filed in the employee's personnel file. If any revisions are required, the form will be returned to the manager with further instructions.

ATTACHMENTS

- Frequently Asked Questions
- PowerPoint Handout
- Approved CSEA Performance Evaluation Form
- Article XII (CSEA 651 Contract)
- Article 14 (CSEA 262 Contract)

PERFORMANCE EVALUATIONS

FREQUENTLY ASKED QUESTIONS

THE EVALUATORS

Who conducts the performance evaluation of classified employees?

Supervisory employees may conduct performance evaluations under the direction of the area manager.

Can lead position employees provide input; how do I incorporate the information provided by other employees?

Lead position employees may provide information to the area manager however, the manager must complete the evaluation and should make certain to observe any problematic behavior addressed in the evaluation.

CONFIDENTIALITY OF PERFORMANCE EVALUATIONS

Why can't I save an electronic copy of an employee's evaluation?

Employee performance evaluations are confidential documents. The District has agreed that the evaluation will ONLY be maintained in the employee's personnel file in Human Resources. Human Resources is unable to ensure that those documents are not accessible by others if copies are kept elsewhere.

PERFORMANCE EVALUATION CRITERIA

My staff members do perform supervisor duties. Why can't I include that in their evaluations?

An employee's performance should be evaluated based on an assessment of duties included in their job description. While they may have lead duties, they are not to be considered as supervisors.

Several years ago, the District made the strategic decision to remove "supervisor" duties from rank and file.

May I address an employee's use of sick leave in the performance evaluation?

Managers may address the affects of an employee's absence on the department, but must not make any reference to an employee's absence due to illness, physical or mental condition(s) and/or disabilities as to do so could violate the Districts non-discrimination policy, Fair and Employment Housing Act, California Family and Sick Law and the Federal American Disabilities Act.

EVALUATION DUE DATES

If an employee has no evaluation on file what is the appropriate timeline to begin the performance evaluation process? What if the employees' evaluations are over a year past due?

The employee must be evaluated based on the last twelve (12) month period or a specific time period indicated on the form, not to exceed twelve (12) months, regardless of the time elapsed, pursuant to the CSEA contracts.

PERFORMANCE EVALUATION MEETING

Can a CSEA representative be present in the Performance Evaluation Meeting? Who then is allowed in the Performance Evaluation Meeting?

The presence of a CSEA representative in a non-disciplinary meeting, under normal circumstances, is neither necessary nor appropriate. Typically, the meeting should include the manager that conducted the performance evaluation and the employee. If a supervisor employee conducted the evaluation then the department manager should also be present.

An employee's evaluation was returned to me by Human Resources for revisions. Do I need to conduct another Performance Evaluation Meeting?

Yes. If there are any revisions to the Performance Evaluation form, the employee must be given the same opportunity to review their evaluation pursuant to the CSEA contract. Signatures from both the employee and manager are required prior to submitting to the Office of Human Resources.