



PERFORMANCE MANAGEMENT SERIES	
COACHING	<ul style="list-style-type: none"> When EE does NOT know step/process Informal and ongoing
DISCIPLINE	<ul style="list-style-type: none"> When coaching is not working Formal with progressive steps
EVALUATION	<ul style="list-style-type: none"> Periodic formal summary Reflects coaching and discipline

Performance Evaluation

Key Points/Suggestions:

*EE = Employee

- Evaluation Process Timeline (permanent EE)
 - Conduct Pre-Evaluation meeting (Recomnd)
 - Conduct Evaluation meeting and provide Evaluation Form to employee by May 15th
 - Obtain signature of receipt
 - Provide copy to EE and to manager
 - Send original Eval to HR-Classified
- Probation Eval: end of 3rd/5th or 8th/11th months
- SECTION A – Do NOT add “Additional Factors”
- SECTION B – Try to provide at least 3 Strengths
- SECTION C – Reference previously set goals
- SECTION D – Record new S.M.A.R.T. Goals
 - Provide Performance Improvement Plan
- SECTION E – Should connect to SECTION D goals
- Overall Rating should align with Factor Ratings
- Appeal Process: Employee may submit rebuttal to HR-Classified up to 10 days after date of receipt

FACTOR & OVERALL RATING STANDARDS	
Exceeds Standards	<ul style="list-style-type: none"> Consistently extraordinary performance Often goes above and beyond what is asked Very independent and proactive REQUIRED – Supportive comments
Effectively Meets Standards	<ul style="list-style-type: none"> Consistently meets expectations Sometimes goes above and beyond what is asked Takes initiative to solve problems
Requires Improvement	<ul style="list-style-type: none"> Does not consistently meet expectations for an average performer in same position Needs more training or experience Requires more oversight/monitoring than average
Not Satisfactory	<ul style="list-style-type: none"> Regularly fails to meet established standards/goals Lacks skill, knowledge, willingness, or capacity to perform well Immediate and sustained improvement required REQUIRED – Supportive comments REQUIRED – Performance Improvement Plan

SECTION A – Evaluation Factors		
1	Observance of Work Hours	<ul style="list-style-type: none"> How often is EE late? How acceptable is justification?
2	Attendance	<ul style="list-style-type: none"> Above average patterns of absences? Monday/Friday absence patterns?
3	Grooming/Dress	<ul style="list-style-type: none"> Is clothing disruptive or unsafe?
4	Compliance with Rules	<ul style="list-style-type: none"> Does EE need reminder/request to follow direction or instruction?
5	Safety Practices	<ul style="list-style-type: none"> Are safety protocols followed?
6	Public Contacts	<ul style="list-style-type: none"> Customer service with the public
7	Pupil Contacts	<ul style="list-style-type: none"> Interpersonal skill/attitude with students
8	Employee Contacts	<ul style="list-style-type: none"> Interpersonal skill/attitude with coworkers and AUHSD staff
9	Knowledge of Work	<ul style="list-style-type: none"> How often is EE asking for versus providing the answer?
10	Work Judgments	<ul style="list-style-type: none"> Record of success with problem-solving Appropriate decision w/o delay
11	Planning and Organization	<ul style="list-style-type: none"> Does EE prioritize in effective ways? Is extra time needed to complete work?
12	Job Skill Level	<ul style="list-style-type: none"> Is EE faster/better than average?
13	Qualify of Work	<ul style="list-style-type: none"> Is work thorough and error-free? Is work impressive or innovative?
14	Volume of Acceptable Work	<ul style="list-style-type: none"> Is output comparable to coworkers? Is overtime necessary to complete work?
15	Meeting Deadlines	<ul style="list-style-type: none"> How often are deadlines not met? What is impact of missed deadlines?
16	Accepts Responsibility	<ul style="list-style-type: none"> Accepts accountability for actions Does what's needed when not desirable

SECTION A – Evaluation Factors		
17	Accepts Direction	<ul style="list-style-type: none"> Is justified work direction challenged? Is challenge constructive and articulate?
18	Accepts Change	<ul style="list-style-type: none"> How adaptable to new challenges
19	Effectiveness Under Stress	<ul style="list-style-type: none"> How well does EE respond to adversity? Does EE inform right people of concerns?
20	Operation, Care of Equipment	<ul style="list-style-type: none"> Does EE properly use and maintain provided equipment?
21	Work Coordination	<ul style="list-style-type: none"> Does EE cause slowdown or duplication of work from lack of coordination?
22	Initiative	<ul style="list-style-type: none"> How proactive/autonomous is EE?
MANAGEMENT ONLY FACTORS		
23	Planning and Organizing	<ul style="list-style-type: none"> Refer to #11
24	Scheduling and Coordinating	<ul style="list-style-type: none"> Does Mgr anticipate and prepare others for work that will impact them?
25	On the Job Training	<ul style="list-style-type: none"> Does Mgr provide effective and relevant coaching to others?
26	Productivity	<ul style="list-style-type: none"> Refer to #14
27	Evaluating Subordinates	<ul style="list-style-type: none"> How accurate is assessment of EE? Is appropriate response ?
28	Judgments and Decisions	<ul style="list-style-type: none"> Refer to #10
29	Leadership	<ul style="list-style-type: none"> Does Mgr inspire confidence and cooperation in others?
30	Operational Economy	<ul style="list-style-type: none"> How well does the Mgr oversee funding they're responsible for?
31	Supervision	<ul style="list-style-type: none"> Does Mgr engage in coaching or discipline when appropriate?