

**INSTRUCTIONS
FOR USE OF THE PERFORMANCE EVALUATION REPORT FORM**

- GENERAL:**
1. After marking, very lightly with pencil, each factor in Section A, the rater shall review the report with his own principal or department head, if any. Markings and comments shall then be typed or inked in. Either the rater or reviewer (or both) shall then review the rating with the employee in a private interview. **All signatures shall be in ink. Changes and corrections shall be initialed by the employee.**
 2. If space for comments is inadequate, similarly dated and signed attachments may be made (either type written or in ink).
 3. **Due Dates** shall be observed, and are particularly important for final probationary reports. Filing dates for these are flexible, and both the first and the final reports may be filed at any time **between** their receipt and the **printed due dated**.
 4. **All probationers** (either new-hire or promotional) shall be evaluated not later than the end of their third full month of probationary service and again after five full months. 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 schedule or an unscheduled performance evaluation report.
 5. **All permanent employees** who have completed at least five months of service in permanent status shall be evaluated annually. Permanent employees may also be separated or demoted in the same manner as probationary employees, provided that all pertinent merit system rules and District procedures are observed.
 6. **Unscheduled reports** may be filed at any time for either permanent or probationary employees.
 7. The "Performance Evaluation Guide for Classified Employees" should 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 the employee is certified for transfer or promotion.
- SECTION A:** Check (✓) one column for each factor. The Column "Does Not Apply" 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 **D requires** specific explanation in Section E.
- SECTION B:** May be used to describe outstanding qualities or performances, particularly when check marks in Column A do not seem adequately descriptive.
- SECTION C:** Use to record progress or improvements in performance resulting from employee's efforts to reach previously set goals.
- SECTION D:** Record agreed-upon or prescribed performance goals for the next evaluation period.
- SECTION E:** Give specific reasons for check marks in Column D. Explanations of check marks in Column C are optional. Record here, any other specific reasons why the employee should not be recommended for permanent status, or -- if the employee is already permanent -- any specific reasons for required improvement.
- SUMMARY EVALUATION:**
- Check the overall performance here, taking into account all factors and total performance over the full period of service being evaluated.
- UNSATISFACTORY:** Performance clearly inadequate in one or more **critical factors** as explained or documented in Section E. Employee has demonstrated inability or unwillingness to improve or to meet standards. Performance not acceptable for position held. (**NOTE:** Such summary evaluation, as well as disciplinary/documentation memo(s) bars the employee from promotional examinations and/or transfer opportunities for one year).
- NEEDS TO IMPROVE:** Total performance periodically, or regularly, falls short of normal standards. Specific deficiencies should be noted in Section E. This evaluation indicates the supervisor's belief that the employee can and will make the necessary improvements. (**NOTE:** Such summary evaluation bars the employee from promotional examinations and/or transfer opportunities for one year).
- COMPETENT/MEETS STANDARDS:** Level of Performance expected of a fully competent employee, who meets the standards of the position in every way.
- OUTSTANDING:** Represents performance which is far above that required for the position. It means ideal, extra ordinary performance. **Very Few** employees qualify as "Outstanding".
- SIGNATURES:** Both the rater and the employee shall date and sign the report. The employee's signature indicates that the conference has been held and that he has had an opportunity to read the report. If he refuses to sign for any reason, explain that his signature does not necessarily imply, or indicate, agreement with the report, and that space is provided for him to state any disagreement. Further refusal to sign shall be recorded on the report, and **after being held for 10 days**, will be forwarded to personnel for placement in the personnel file.
- APPEAL:** Evaluation reports express the judgment and opinions of **supervisory authority**, and as such, **are not** subject to appeal under rules of the merit system, unless there has been a resultant action taken to suspend, demote, or dismiss a permanent employee.