

**Performance Report Instructions – Classified Service Employees
July 2016**

Conducting scheduled performance review discussions with your classified service employees is a management expectation. As a manager, timely submission of the completed document is your responsibility. In the event that your employee refuses to sign the document, please send the document to HR timely indicating this situation directly on the form itself. Please do not hesitate to contact HR with questions.

- A copy of the current Board approved job description for the classified employee to be evaluated is being emailed to you. As you complete the evaluation process, this becomes an important reference document.
- The “Instructions to Rater” section of the performance report form includes a sentence which states: “This performance evaluation process includes a review and discussion about the current Board approved job description for this position.” When you sign as the Supervisor at the bottom of this form, you are affirming that you have conducted this review and discussion with your classified employee during each annual (or more frequently if a probationary status employee) evaluation discussion.
- Beginning July 2016, an additional signature will be required in order for the evaluation process to be considered complete. The “manager” of the “supervisor” will also sign the evaluation. If you are unsure who this individual is, feel free to contact HR to inquire.
- As part of each evaluation process, your employee will be indicating whether they believe they have been expected to perform work outside of their Board approved job description during the past calendar year. If your employee indicates that they believe that they have been performing work outside of their current classification, this is your opportunity to understand their perspective, share your perspective, and make a responsible decision regarding your expectations about their continuing to perform these duties going forward. A notation summarizing the results of this discussion, initialed by both parties, must be attached to the evaluation document and submitted to HR. Allowing “job creep” to continue could lead to a request for reclassification consideration. If your employee indicates uncertainty with respect to whether new duties that you have assigned are within their current classification, they can request a meeting to include you, me, and their labor representative to discuss and make this determination.
- There are five possible rating levels. A performance rating of “outstanding” in an area should be reserved for truly distinguished, sustained performance by an employee. A rating at this level deserves specific supporting information in the “comments” section.
- The definition of “Above Average” reads, “Often exceeds performance standards.” A rating at this level warrants additional supporting information in the “comments” section of this document.
- Ratings of “marginal” or “unsatisfactory” must be supported by helpful, specific descriptions of performance or behavior that needs improvement. Specific suggestions to aid employee in improvement are also required. Providing specific examples will be helpful for you and the employee. This is not intended to discourage you from appropriately rating unsatisfactory performance in an area, but to encourage you to provide constructive feedback, support and guidance to your employee. Your role is critical in their ability to perform effectively, meet your expectations, and succeed in their position.
- Factor definitions (found on the reverse side of the form) are intended to provide supervisors with a useful tool for rating each performance factor area. Please carefully consider each factor individually, without allowing your assessment of a performance factor in one area to influence your rating in another area.
- If you have more than one employee in a classification, the values that you apply to each factor should be uniformly applied to all employees in that classification.

**SANTA BARBARA COMMUNITY COLLEGE DISTRICT
PERFORMANCE REPORT – CLASSIFIED SERVICE EMPLOYEES**

| | | | | | | | |
|---|------------|------------|---|---|--|---|---|
| Last Name | First | Initial | OUTSTANDING – Consistently exceeds performance standards. | ABOVE AVERAGE – Often exceeds performance standards | SATISFACTORY – Regularly meets performance standards | MARGINAL – Needs to improve to meet performance standards | UNSATISFACTORY – Fails to meet acceptable performance standards |
| Class Title | | Department | | | | | |
| Due to HR: | Supervisor | | | | | | |
| Evaluation: <input type="checkbox"/> 4 month <input type="checkbox"/> 8 month <input type="checkbox"/> 11 month (permanency) <input type="checkbox"/> Annual <input type="checkbox"/> 3/5 month promotional <input type="checkbox"/> Special Refer to CSEA Agreement Article regarding Evaluation | | | | | | | |
| Instructions to Rater: Please read basis for evaluation (attached) before completing this form. Check the appropriate box, which indicates the employee's performance for the factors that apply. Use comments section below as needed to explain ratings. Additional sheets may be attached. This performance evaluation process includes a review and discussion about the current Board approved job description for this position. | | | | | | | |
| 1. Quality of Work | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Quantity of Work | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Work Habits | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Work Attitudes | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 5. Relationships with Others | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Personal Qualities | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 7. Leadership Ability (where applicable) | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| 8. Professional Development – refer to Career Success and Satisfaction Plan | | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

COMMENTS: Ratings of "Marginal" or "Unsatisfactory" must be supported by a statement of facts. Specific suggestions to aid employee in improving performance must be attached. Compliments and special commendations should also be made if applicable. Mutually developed goals and objectives are also recommended for annual performance evaluations.

Employee to initial one option:

_____ I have performed work outside of my current Board approved job description (attached) in the past calendar year.

_____ I have not performed work outside of my current Board approved job description (attached) in the past calendar year.

_____ I have been asked by my supervisor to perform new duties in the past calendar year. I am unclear as to whether or not these duties are included in my current Board approved job description. I am requesting a meeting with my supervisor, Human Resources, and my labor representative in order to receive clarification.

Employee's signature

| | | |
|---|-------|---------------------|
| Supervisor's Signature | Title | Date |
| Manager's Signature | Title | Date |
| Employee's Signature | Title | Date |
| This report has been discussed with me. Signing this form does not necessarily mean that I agree with all the ratings. A copy of this Performance Report will be placed in my personnel file. I understand that I have the right to submit a response to my Performance Report. This response is to be attached to my evaluation and placed in my personnel file. | | Employee's Initials |

**SANTA BARBARA COMMUNITY COLLEGE DISTRICT
CLASSIFIED EMPLOYEE EVALUATIONS
FACTOR DEFINITIONS**

These definitions are only guides. The weight given each item is determined by the value of that item to each classification. Once the values are determined, they should be uniformly used for all employees in that classification.

1. Quality of Work

- Demonstrates satisfactory knowledge of the job.
- Performs work with acceptable accuracy.
- Work is neat and presentable.
- Is thorough in the work done.

2. Quantity of Work

- Volume of work regularly produced within established schedules and deadlines that meet job requirements and guidelines.

3. Work Habits

- Reports to work on time; complies with reporting standards for attendance; takes appropriate breaks and meal periods.
- Carries out tasks in an orderly and diligent manner.
- Demonstrates the ability to work without immediate supervision.
- Complies with instruction, rules and regulations, including health and safety precautions.

4. Work Attitudes

- Endeavors to improve work techniques.
- Accepts new ideas and procedures.
- Is cooperative and willing to accept supervisor's suggestions for improvement.
- Accepts responsibility willingly within the job description guidelines.

5. Relationships with Others

- Gets along well with fellow staff, students and the public.
- Cooperates with supervisor.
- Observes established channels of communication.
- Keeps relations with students and faculty on a friendly and impersonal level.

6. Personal Qualities

- Acts with good judgment.
- Demonstrates initiative and drive.
- Is adaptable to emergencies and new situations.
- Dress and grooming are appropriate.

7. Leadership Ability

- Demonstrates effective leadership.
- Is fair and impartial in relationships with co-workers.
- Makes good and timely decisions.
- Trains and instructs co-workers effectively.
- Plans, schedules and makes assignments fair and impartially.

8. Professional Development

- Participates in training.
- Takes initiative to meet goals of Career Success and Satisfaction Plan.
- Applies training concepts to work assignment.
- Shares knowledge gained through Professional Development with others.
- Participates in Professional Growth Program.