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| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Probationary (3 mo.)** |  | NEWPORT-MESA UNIFIED SCHOOL DISTRICT | | | | | **CONFIDENTIAL** | | |
| **Probationary (5 mo.)** |  |  |  |  |  | |  |  |  |
| **Annual** |  | PERFORMANCE REPORT FOR MANAGEMENT, | | | | | | | |
| **Unscheduled** |  | **SUPERVISORY AND CONFIDENTIAL PERSONNEL** | | | | | | | |
|  |  |  |  |  | |  |  |  |  |
|  | | |  |  | | |  |  |  |
| **Employee Name (Please Print)** | | | | Due Date | | | | | |
|  | | | |  |  | |  |  |  |
| Job Title |  | School or Department | **Evaluation Period:** | **From:** | | | | **To:** | |

|  |  |
| --- | --- |
| **Specific reasons for a rating of “needs to improve” and “unsatisfactory” must be clearly stated and include suggestions to assist the employee to improve performance.** | **4-Regularly exceeds work performance standards**  **3-Regularly meets work performance standards**  **2-Needs to improve**  **1-Unsatisfactory**  **NA-Not applicable** |

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| ATTENDANCE |

|  |  |  |  |  |  |  |  |  |
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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Attendance perfect or nearly so. (Requires comments). | Work not adversely affected by absences. Observes work hours. | Absences and/or tardies adversely affect work. Employee may not follow procedures to report his/her absence. | Consistent pattern of absence and/or tardiness. |  | | | | |

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| Comments: |

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| QUALITY OF WORK |

|  |  |  |  |  |  |  |  |  |
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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Consistently completes tasks at a level that is above and beyond what is required. Anticipates needs of the site/department. (Requires comments). | Accurate and thorough in performing tasks. | Is not consistently accurate and thorough in performing tasks. May require corrections by supervisor and additional training/skill acquisition. | Is not accurate and thorough in performing tasks. Tasks not completed in a timely manner. Has not improved performance following clarification of expectation and/or assistance. |  | | | | |

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| Comments: |

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| PLANNING/ORGANIZING WORK |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Prioritizes and completes more than the required amount of tasks and is knowledgeable about all aspects of the job. (Requires comments). | Completes appropriate amount of tasks based on job knowledge. Performs job tasks in a timely manner using allotted time and resources efficiently and effectively. | Does not consistently complete required tasks in a timely manner or uses resources efficiently and effectively. May need assistance with prioritizing and reminders to complete assignments. | Prioritizing often neglected, resulting in important tasks not being completed. May not consistently use resources efficiently and effectively within timelines. |  | | | | |

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| Comments: |

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| DEPENDABILITY ON THE JOB |

|  |  |  |  |  |  |  |  |  |
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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Does not need to be reminded to follow-through on tasks from start to finish. Reacts quickly, appropriately and without specific instructions to all demands of the job. Anticipates site/department needs and follows through in advance of Superintendent’s request. (Requires comments). | Uses good decision making skills and follows through on tasks from start to finish. Little supervision required. | Does not consistently follow through on tasks and does not consistently use effective decision making skills. Supervision may be required to complete assigned work. | Does not follow through on tasks and does not use effective decision making skills. |  | | | | |

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| Comments: |

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| HUMAN RELATIONS |

|  |  |  |  |  |  |  |  |  |
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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Consistently communicates well and works effectively with:   * Supervisors * Co-Workers * Public/other District staff * Students   (Requires comments). | Communicates well and works effectively with:   * Supervisors * Co-Workers * Public/other District staff * Students | Does not consistently communicate well and work effectively with others. Does not effectively apply positive customer service. | Does not communicate well and work effectively with others. May require supervisor intervention. |  | | | | |

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| Comments: |

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| PERSONAL QUALITIES |

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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Consistently utilizes initiative and readily adapts to changing situations. (Requires comments). | Generally utilizes initiative and works with very little supervision. Demonstrates flexibility in adapting to changes. | Infrequently utilizes initiative in completing job related tasks or work without immediate supervision. Is not consistently flexible in adjusting to changes. | Does not utilize initiative in completing job related tasks or have the ability to work without supervision. Is not flexible in adjusting to changes. |  | | | | |

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| Comments: |

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| SAFETY PRACTICES |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Always observes safety rules and practices. Always works quickly and safely with equipment and job related materials. Shows the concern of safety for others. (Requires comments). | Observes safety rules and practices. Works quickly and safely with equipment and job related materials. | Does not consistently observe safety rules and practices and does not consistently work quickly and safely with equipment and job related materials. | Does not observe safety rules and practices and does not work quickly and safely with equipment and job related materials. |  | | | | |

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| Comments: |

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| LEADERSHIP/MAINTAINING MOTIVATION |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Consistently communicates thoughts, feelings and ideas to encourage, persuade, convince or otherwise motivate an individual or group, including responsibly challenging existing procedures, policies or authority. Sets high expectations for self and others. Is a positive role model. Provides frequent feedback to co-workers regarding performance expectations. Seeks continual improvement and professional growth. | Usually communicates thoughts, feelings and ideas to encourage, persuade, convince or otherwise motivate an individual or group, including responsibly challenging existing procedures, policies or authority. Supports co-workers in reaching goals. Challenges self to continually learn and grow. | Inconsistently or occasionally communicates thoughts, feelings or ideas to encourage, persuade, convince or otherwise motivate an individual or group, including responsibly challenging existing procedures, policies or authority. | Ineffectively communicates thoughts, feelings or ideas to encourage, persuade, convince or otherwise motivate an individual or group, including responsibly challenging existing procedures, policies or authority. Does not communicate difficulties or needs. Becomes defensive when positions/opinions are questioned. Does not support the growth of others to reach District goals. Inconsistent behavior and/or actions toward staff and customers. |  | | | | |

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| --- |
| Comments: |

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| --- |
| OPERATIONAL ECONOMY/EFFICIENCY |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Successfully uses or prepares budgets; may include making cost and revenue forecasts; keeps accurate records to track budget performance and makes adjustments when appropriate. Focus is on meeting District Strategic Plan goals. | Plays a keep role in budget preparation. Successfully makes cost and revenue forecasts. | Rarely tracks budget to ensure correct alignment of costs vs. funds. | Does not align spending with budget which may result in cost overruns and inability to ascertain accurate account balances throughout the year. |  | | | | |

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| Comments: |

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| SCHEDULING AND COORDINATION |

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| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Selects relevant, goal-related activities, ranks them in order of importance, allocates time to activities; understands, prepares and follows schedules. Goals are always met on time. (Requires comments). | Establishes schedules and coordinates resources which result in timelines being met. | Inconsistently structures available resources appropriately. Experiences difficulty in scheduling which may result in time conflicts and loss of resources. | Goals are rarely completed on time. Frequently experiences difficulty in scheduling. |  | | | | |

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| Comments: |

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| EVALUATION OF PERSONNEL |

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| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Effectively assesses knowledge and skills, evaluates performance and provides timely and meaningful feedback. Effectively utilizes improvement process which consistently results in improved employee performance. (Requires comments). | Adequately assess knowledge and skills, evaluates performance and provides appropriate feedback. Uses the improvement process when appropriate. | Inconsistently assess knowledge and skills, minimally evaluates performance and provides some feedback. Timelines are not met. | Rarely assesses knowledge and skills, fails to appropriately evaluate performance, feedback seldom provided. |  | | | | |

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| Comments: |

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| TRAINING/INSTRUCTION/ACHIEVEMENT OF ESTABLISHED GOALS |

|  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Exceeds** | **Meets** | **Needs to Improve** | **Unsatisfactory** | **4** | **3** | **2** | **1** | **NA** |
|  |  |  |  |  |  |  |  |  |
| Effectively establishes goals and seeks our professional growth opportunities for self and staff including new technologies; consistently uses professional literature and development opportunities to improve learning. (Requires comments). | Establishes goals and seeks out professional growth opportunities and training for staff, uses professional literature and/or development opportunities to improve learning. | Ineffective development of goals and gives little thought to professional growth activities; rarely uses professional literature and development opportunities to improve teaching and learning. | Develops superficial goals with little thought or action. Does not seek out professional development activities; rarely uses professional literature and development opportunities to improve teaching and learning. |  | | | | |

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| Comments: |

**OVERALL EVALUATION RATING (check one) (Note any exceptions).**

**Any category marked unsatisfactory will require an improvement plan and a reevaluation of that category within three months.**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
|  | **Exceeds Standards** |  | **Meets Standards** |  | **Needs to Improve** |  | **Unsatisfactory** |

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| --- |
| Additional comments/goals if applicable: |

I have received a copy of this evaluation and it has been discussed with me. Signing this form does not necessarily mean that I agree with the ratings.

Employee’s Signature Date

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Signature of Evaluator Title of Evaluator Date

|  |  |  |  |
| --- | --- | --- | --- |
| Comments by Employee: | | | |
| **attachment included:** |  |

**RECOMMENDATION BY SUPERVISOR:** It is recommended that this employee:

|  |  |
| --- | --- |
| Be granted permanent status |  |
| Not be granted permanent status |  |
| Requires Improvement Plan |  |
| Permanent Employee - Not Applicable |  |

DISTRIBUTION: Original to Human Resources - One Copy to Supervisor - One Copy to Employee

### Classified Personnel S:/Evaluation 12/13/00