

**District Assembly Meeting Addendum  
Tuesday, February 5, 2019**

**Agenda Item:** 5.A.6 – Consideration to approve item for 2<sup>nd</sup> reading

vi. AP 7150 Evaluation

**Description:** HR consulted with CSEA and Academic Senates as requested on 12/8/18. AP 7150 is revised for 2nd reading.

AP 7150 Evaluation as of 2/4/19

(Replaces current SBCCD AP 7251)

Employees represented by CSEA and CTA should refer to their respective bargaining unit agreements for information specific to their unit.

### **Frequency of Evaluation**

Each manager will be evaluated once per year for the first two years of employment and every three years thereafter. Evaluations may be held on a more frequent basis as appropriate.

For managers within the first year of evaluation, the supervisor and employee will establish goals and objectives to be accomplished. The manager will be solely responsible for providing an evaluation within the first six months of hire. In the subsequent year evaluation. In the subsequent and each year and each year thereafter, the evaluation committee process will be instituted.

Interim Manager assignments will be evaluated during the first year-sixth month of interim appointment and annually thereafter if the assignment is greater than one semester in length. The manager will be solely responsible for providing the evaluation. Evaluations may be held on a more frequent basis as appropriate.

### **EVALUATION TIMELINE:**

No later than October 30<sup>1</sup> of each calendar year the supervisor and employee will meet to initiate the evaluation process. This meeting will entail the review of prior goals, if applicable, and the establishment of new goals for the current year.

By November 30<sup>1</sup> of each year, the ~~evaluation~~-committee shall be formed. The committee will meet and convene and provide a written evaluation summary report to the immediate supervisor no later than January December 30 of each calendar year.

The final evaluation report shall be provided to the evaluatee no later than March 1-January 30 of each calendar year.

### **Goals/Objectives**

Each manager will meet with his/her supervisor at the beginning of each academic year to review the goals and objectives set for the prior year and to discuss the extent to which the goals and objectives were met. They will review the job description and, by mutual agreement, revise, update, or set new short- and long-range goals and objectives.

In an effort to ensure that employee evaluations are completed in a timely manner, the following process will be followed by Human Resources:

1. The immediate supervisor of the employee who is to be evaluated will receive an email directly from HR notifying the supervisor that an evaluation is due.
2. The evaluating supervisor's manager will also receive the email and will be responsible for ensuring the evaluation is completed and forwarded to HR within the required timeframe.
3. The President of the College and the appropriate Vice President will be copied on the email.

### **Evaluation Committee**

In the case of campus-level managers Directors, Deans and Vice Presidents, the committee shall include the immediate supervisor as chairperson, one manager appointed by the President, one faculty member appointed by the Academic Senate, and one classified employee appointed by in collaboration with CSEA. In each case, the manager will nominate three individuals from each category, (management, faculty and classified), from which the appointments shall be made. and hiring manager. Surveys will be sent district wide for input.

In the case of the College Presidents, the committee shall include the immediate supervisor as chairperson, one manager appointed by the Chancellor, two faculty members appointed by the Academic Senate, and one classified employee appointed by in collaboration with CSEA as appropriate to the campus. In each case, the President will nominate three individuals from each category, (management, faculty and classified), from which the appointments shall be made and hiring manager.

In the case of the district-level Directors, Executive Directors, Associate Vice Chancellor(s), Vice Chancellor(s) and Executive Vice Chancellor(s), the committee shall include the immediate supervisor as chairperson, one manager appointed by the Chancellor, one faculty member appointed by the Academic Senate at San Bernardino Valley College, one faculty member appointed by the Academic Senate at Crafton Hills College, and one classified employee appointed in collaboration with CSEA and hiring manager. All supervisors and managers, the committee shall include the

~~immediate supervisor as chairperson, one will be evaluated by the hiring manager, appointed by the Chancellor, one faculty member appointed by the Academic Senate at San Bernardino Valley College, one faculty member appointed by the Academic Senate at Crafton Hills College, and one classified employee appointed by CSEA. In each case, the manager Surveys will nominate three individuals from each category, (management, faculty and classified), from which the appointments shall be made sent districtwide for input.~~

In the event a committee member is unable to participate, an alternate can be appointed if selected prior to the ~~evaluation~~ committee meeting.

### **Campus/District Survey**

As appropriate to the assignment, the ~~committee~~ hiring manager shall seek written feedback from the campus and/or district community. In obtaining this feedback, the ~~committee~~ hiring manager shall use an approved evaluation form ~~approved by the Board of Trustees~~. Using the approved form, the ~~committee~~ hiring manager shall seek input from applicable managers, faculty, classified staff and any others who are in a position to know how effectively the manager is performing assigned responsibilities. ~~To assist in this task, the manager will provide the committee with a preliminary list of those with whom he/she interacts with on a regular basis.~~ Responses on the approved form shall be signed, and the ~~committee~~ hiring manager shall prepare a consolidated summary of the ratings and comments. Original survey documents will be destroyed once the consolidated summary is prepared. A copy of the consolidated summary will be made available to the ~~manager committee at the conclusion of the evaluation procedure.~~

### **~~Evaluation Committee Meeting~~ Evaluatee**

Prior to the evaluation conference, the ~~person~~ manager being evaluated will submit to ~~the~~ their supervisor a written self-evaluation of his/her performance, which shall be based on the approved job description and previously established, mutually agreed upon goals and objectives. The ~~employee~~ manager may submit a portfolio of representative work, or any other items he/she considers appropriate.

~~The supervisor and the evaluation committee will meet to consider the self-evaluation, the campus/district survey, and any additional material submitted by the manager. The committee may consider any other documents or information sources which they agree are appropriate.~~

## Evaluation Report

The ~~committee-hiring manager~~ will produce a written evaluation report ~~within two months following the start of the evaluation process~~ by January 30. The report shall include:

1. A summary of duties from the job description, which shall serve as a basis for the evaluation.
2. A summary list of the goals and objectives from the prior year that have been mutually agreed upon by the manager and his/her supervisor.
3. An assessment of the extent to which the ~~manager~~ evaluate meets his/her stated goals and objectives.
4. An assessment of the management and leadership strengths of the manager evaluatee.
5. The identification of any areas in which the manager can improve his/her performance or management skills.
- 5-6. A copy of the consolidated summary of the ratings and comments.

The written report shall specify one of the following:

1. Commendation for superior performance;
2. Confirmation of satisfactory performance;
3. Recommendation for improvement and/or further evaluation as indicated by unsatisfactory performance.

The evaluation record shall be read and signed by the ~~manager, the immediate supervisor, and the responsible evaluators~~ hiring manager before being placed in his/her file. The ~~manager~~ evaluate shall receive a copy of the evaluation report, and will have an opportunity to attach a written response within fifteen working days. The response may offer clarification, additional information, or a rebuttal, as the person being evaluated may wish.

An official file of evaluation reports shall be maintained in the District Office Human Resources ~~Office Department~~. Evaluation reports shall not be retained in the file beyond a four-year period if the manager requests that they be expunged.

There will be only two copies of a completed evaluation. One copy will remain in the possession of the manager being evaluated and the original will become a part of the official file in the Human Resources Office Department.

## Procedures in the Case of Unsatisfactory Performance of Responsibilities

When a manager's performance is judged unsatisfactory, corrective measures will be initiated. The manager shall develop a work plan with measurable goals, objectives and a timetable to correct the areas judged unsatisfactory. This work plan shall be reviewed and approved by the ~~immediate supervisor~~ hiring manager (or Board of Trustees, in the case of the Chancellor) who shall be responsible for monitoring and assisting the manager with the corrective measures. If desired, the immediate supervisor will work with the manager to identify a mentor to provide guidance and advice.

In order to ascertain the extent to which corrective measures have succeeded, the re-evaluation of the manager shall be undertaken as soon as deemed appropriate by the supervisor, but in no case later than six months after the initial findings of the evaluation committee. The re-evaluation process shall include the submission of new goals and objectives to the immediate supervisor, the formation of a new evaluation committee, the collection of new survey data, and the preparation of an updated evaluation report that assesses the progress (or lack of progress) made since the last evaluation.

### **Nonrenewal of Contract, Dismissal, or Penalty of Limited Duration**

In the case of unsatisfactory progress following re-evaluation, managers shall be notified of contract non-renewal, dismissal, or penalty of limited duration by action of the Board of Trustees in accordance with the Education Code.

Classified employee evaluations will be conducted in accordance with the Agreement between the District and the Chapter of the California School Employees' Association.

Confidential employee evaluations will be conducted every three months for the first ~~nine~~ twelve months of service, then every two years thereafter.

Faculty, evaluations (both full and part-time), ~~evaluations~~ will be conducted in accordance with the Agreement between the District and Chapter of CCA/CTA/NEA.

Additional documents related to evaluation can be reviewed on the Human Resources web-page.

Also see BP/AP 2435 titled Evaluation of the Chancellor

**Reference:**

Accreditation Standard III.A.5 (formerly III.A.1.b)