

TA: _____ (date)
_____ (initials)

ARTICLE 13: PERFORMANCE EVALUATION PROCEDURES

13.1 **PERFORMANCE EVALUATION.** The purpose of an evaluation shall be to provide constructive feedback that will assist unit members with continuous improvement of performance in line with DISTRICT expectations and performance standards. ~~The term “evaluation” as used in Sections 13.2 through 13.8 of this Article means a formal written evaluation on the appropriate form prescribed by the DISTRICT (Appendix D).~~

13.1.1 **Performance Evaluation Form.** The performance evaluation shall be submitted by using the “Employee Performance Evaluation” form (accessible via the District intranet) and for reference purposes, a copy of the Employee Performance Evaluation form is located in Appendix (insert).

13.1.2 **Performance Evaluation Evaluator.** The evaluator shall be the unit member’s immediate supervisor unless otherwise designated by the DISTRICT; ~~h~~However, the evaluator shall only be a person of management at the San Bernardino Community College District management.

~~13.2 The DISTRICT shall evaluate all unit members on permanent status once every two (2) years during the month of April, except in emergency circumstances. The annual evaluation for unit members obtaining permanent status prior to January 1st, will be conducted in the current school year. The annual evaluation for unit members obtaining permanent status subsequent to January 1st, will be conducted in the following school year. (moved to 13.2)~~

13.2 PERFORMANCE EVALUATION - FREQUENCY

13.2.1 **Probationary Unit Members.** The DISTRICT shall evaluate probationary unit members ~~on probationary status shall be evaluated~~ by the completion of their second (2nd) month and immediately prior to the completion of their fourth (4th) month of probationary service. ~~no less than two (2) times during the probationary period on or about the second (2nd) and the fourth (4th) month from the initial date of hire. The probationary period for unit members shall be six (6) months from the date of hire or appointment to a new classification. Probationary shall be required to serve in a probationary status for six (6) months from the date appointed to the position classification.~~

13.2.2 **Permanent Unit Members.** The DISTRICT shall evaluate permanent unit members ~~all unit members on permanent status once~~ every year ~~every (two (2) years) during their anniversary month (for purposes of this Article, “anniversary month” shall mean the month the unit member started in their current classification) the month of April, except in emergency circumstances as defined in Article 2: Management Rights or when the unit member is on leave.~~

13.3 The DISTRICT retains its prerogative to make additional evaluations as it deems necessary.

~~13.4 The evaluator shall be the unit member’s immediate supervisor unless otherwise designated by the DISTRICT. However, the evaluator shall only San Bernardino Community College District management. (moved to 13.1.2)~~

13.3 **PERFORMANCE EVALUATION – TIMELINE AND COMPONENTS.** The comprehensive performance evaluation for unit members shall be comprised of the following two (2) distinct components:

- a. **Unit Member Self-Assessment.** As part of the performance evaluation process, each unit member may complete the self-assessment portion of the "Employee Performance Evaluation" form (accessible via the District intranet) during the month prior to their anniversary month and shall be given a reasonable amount of paid time to complete it. **The self-evaluation shall be shared with the evaluator and will become part of the evaluation report.**
- b. **Evaluator's Evaluation.** As part of the performance evaluation process, the evaluator shall prepare the unit member's performance evaluation by completing the "Employee Performance Evaluation" form (accessible via the District intranet). In the event, the overall performance evaluation rating is "Performance Needs Improvement" or "Unsatisfactory Performance" the evaluator, in consultation with the Office of Human Resources shall develop a written Performance Improvement Plan (PIP).

13.4 PERFORMANCE EVALUATION – CONFERENCE. The evaluator shall meet with the unit member and shall discuss and review the performance evaluation form.

In the event, the overall performance evaluation rating is "Performance Needs Improvement" or "Unsatisfactory Performance" the evaluator, in consultation with the Office of Human Resources shall develop a written Performance Improvement Plan (PIP). ~~The written PIP shall include an explanation of the reason(s) for such deficiencies specified in the "Employee Performance Evaluation" form and assist the unit member in making improvements. Expectations shall be outlined and discussed with the unit member to give an opportunity for improvement. The immediate supervisor shall identify improvements needed and how the unit member may improve their performance. The immediate supervisor shall provide a written development plan including coaching and training, as needed, to address the identified deficiencies specified in Appendix D (Employee Performance Report). The unit member's performance must be reviewed within sixty (60) ninety (90) days to document the unit member's progress, including any recommendations for continued success. (moved to 13.6)~~ **This PIP shall incorporate all of the terms identified in also constitute a performance improvement conference in accordance with Article 17: Progressive Discipline, section 17.3.1, and shall serve as Step 1 of Progressive Discipline.**

13.5 PERFORMANCE EVALUATION – EMPLOYEE ACKNOWLEDGMENT AND RESPONSE. A unit member may acknowledge that they have received the performance evaluation by electronically signing and dating the evaluation; however, the unit member's electronic signature does not reflect either agreement or disagreement with the performance evaluation. In the event, that the unit member does not electronically sign the performance evaluation, the evaluator shall state on the performance evaluation form that the unit member refused to sign and shall identify the date on which they discussed and reviewed the performance evaluation with the unit member.

A unit member may be provided thirty (30) calendar days to provide a written response and/or documentation to the performance evaluation. A unit member's written response and/or documentation shall be filed in accordance with the District's online performance evaluation system and shall become part of the unit member's personnel file.

~~13.5~~ The evaluation shall be signed by the evaluator and the unit member being evaluated. The unit member's signature signifies only that the unit member has read the document, has been given a copy, and has been given the opportunity of attaching a written response which shall become part of the permanent record. Unit members have thirty (30) calendar days to file a written response to their evaluation with the Office of Human Resources.

~~13.6~~ No evaluation of a unit member shall be placed in the unit member's personnel file without an opportunity for discussion between the unit member and the evaluator. A negative evaluation rating of 1 or 2 shall include an Employee Development Plan. The immediate supervisor shall identify improvements needed and how the unit member may improve their performance. The immediate supervisor shall provide a written development plan including coaching and training, as needed, to address the identified deficiencies specified in **Appendix D** (Employee Performance Report). The unit member's performance must be reviewed within ninety (90) days to document the unit member's progress, including any recommendations for continued success.

~~13.7 The DISTRICT retains its prerogative to make additional evaluations as it deems necessary.
(moved to 13.3)~~

13.8 The substance of any evaluation, including the observations, opinions, and conclusions of the evaluator, shall not be subject to the grievance procedure. The evaluation procedure as provided hereinabove shall be grievable.

~~13.9 An official file of evaluation reports shall be maintained in the DISTRICT's Office of Human Resources. The unit member shall have the right to review any evaluation during working hours. Evaluation reports shall not be used in disciplinary action against a unit member if the evaluation report was dated two (2) years preceding the aforementioned disciplinary action or was dated during a permanent unit member's probationary period.~~



Direct Manager:
Melanie Gonzales

Test eforms Employee

CSEA Employee Performance Evaluation (from May 2022 to April 2024)

Due Date: Sun, Mar 10, 2024

General Information

Position Professional Expert	Division	Evaluation Type Periodic
Department Human Resources	Class Spec Classified Hourly	

Rating Summary By: _____

Content

NARRATIVE SECTION | TEXT ONLY

Employee Self-Assessment

Accomplishments (NEW)

Major accomplishments for this review period (e.g., assignments completed, reports, presentations, recognitions and awards, or other significant and/or high-quality results and achievements).

COMMENT

Challenges (NEW)

Describe barriers or constraints that influenced your performance during the review period, if applicable.

COMMENT

Commitment to Diversity, Equity, & Inclusion (NEW)

Describe considerations and actions you have taken to demonstrate your commitment to a diverse, equitable, and inclusive workplace.

COMMENT

Student Success (NEW)

Describe your contributions to student success, which may include direct or indirect measures.

COMMENT

Performance Factors (NEW)

The objectives of the performance evaluation process for Employee Performance Evaluations are to: Provide employees with feedback to improve or maintain job performance, identify areas for employee development, recognize job-related accomplishments, enhance communication and working relationships, and understand how the work we do helps fulfill the mission of the District.

Job Knowledge (NEW)

ITEM WEIGHT 14.28 %

The effectiveness with which the employee demonstrates proficiency in the functional and technical aspects of the job.

Core Behavioral Anchors:

- › Demonstrates and applies the knowledge and skills necessary to perform the job effectively.
- › Chooses appropriate tools or technology for tasks.
- › Understands and complies with position procedures and District policies; and with external regulations, if any.
- › Remains current on new developments in area of responsibility.
- › Uses knowledge and skills to assist others and shares knowledge to improve team performance.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Commitment to Quality and Quantity of Work (NEW)

ITEM WEIGHT 14.28 %

The manner in which the employee drives quality and quantity of service in the employee’s approach to work and completion of job assignments, including accuracy, innovation, effective use of resources, productivity and accountability.

Core Behavioral Anchors:

- › Effectively applies time and resource management, priority setting and organizational skills to produce appreciable quantities of quality work.
- › Identifies and adopts innovative methods to improve the quality and quantity of work.
- › Demonstrates accountability and results in successfully meeting productivity and quality goals.
- › Actively seeks to leverage resources to promote improved quality and optimal productivity.
- › Assesses and recommends improvements to work practices and systems to improve quantity and quality of service or products delivered.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Problem Solving and Decision Making (NEW)

The manner in which the employee completes job assignments, including judgment, problem solving and use of appropriate resources in decision making.

Core Behavioral Anchors:

- › Approaches problem solving in a systematic manner.
- › Decisions are clear, consistent, and timely, and have positive results.
- › Identifies and implements effective solutions to problems while remaining sensitive to the needs of others.
- › Utilizes appropriate resources (e.g., people, tools, research, analysis) in seeking solutions.
- › Proactively solves problems.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Communication Skills (NEW)

To the extent required by the position, the effectiveness of the employee in transmitting information, including facilitation/participation in sharing information, and oral and written expressions.

Core Behavioral Anchors:

- › Demonstrates effective written and oral communication skills.
- › Communicates clearly and knowledgeably.
- › Encourages open communication and appropriately shares information with others.
- › Listens attentively and seeks to understand others.
- › Adapts communication to diverse audiences.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Customer Service (NEW)

The effectiveness of the employee in providing quality service to internal and external customers, including demonstrated commitment to improvement of services.

Core Behavioral Anchors:

- › Meets needs and expectations of customers.
- › Solicits and acts on feedback and explores creative approaches to enhance service and increase efficiency.
- › Solves problems at first point of contact whenever possible; if unable to do so, escalates to an appropriate resource.
- › Responds to requests in a timely manner.
- › Establishes and maintains effective customer relations with customers (students, colleagues, community, etc.).

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Collaboration/Teamwork (NEW)

The effectiveness with which the employee works with others to achieve individual and departmental goals.

Core Behavioral Anchors:

- › Builds productive working relationships by effectively partnering with team members and others at work.
- › Works collaboratively with team members and is open to communication in both directions.
- › Seeks to understand the views of coworkers and other team members.
- › Balances individual and departmental goals.
- › Shares information and knowledge with others, as appropriate.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

Inclusiveness (NEW)

The manner in which the employee demonstrates commitment to diversity, equity, inclusion, and anti-racism as a core value governing all workplace behavior and interactions.

Core Behavioral Anchors:

- › Skillfully performs job duties within an increasingly diverse campus environment.
- › Treats all others with courtesy, respect and dignity.
- › Includes and welcomes all others.
- › Encourages the expression of different points of view.
- › Seeks to understand the perspectives of all others.

SCORE	NAME	COMMENT
5	Exceptional Performance	
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	

COMPETENCY SECTION | TEXT ONLY

Development Goals and Opportunities

If applicable, please use the following section to present an organized approach to furthering the employee's professional development and/or employee's professional skill set. Indicate any learning and/or resource methods that might be helpful in furthering the employee's professional development and/or resources (e.g., stretch assignments, development in place, self-development, and cross-training).

Development Goals

Please provide the employee with goals and objectives that are the most important priorities for the employee to focus on; achievement of these goals and objectives by the employee may significantly benefit the employee in their professional development and/or professional skill set.

COMMENT

Development Opportunities

Please identify development opportunities for the employee to focus on that likely will be useful for the employee in the upcoming years and/or in the employee's career path.

COMMENT

COMPETENCY SECTION | TEXT ONLY

District-Wide Performance Standards

District-Wide Performance & Conduct Standards (NEW)

The SBCCD Performance & Conduct Standards include: AP3050 Institutional Code of Ethics, AP3430 Prohibition of Harassment, AP3510 Workplace Violence Plan, AP3720 Computer and Network Use, AP7100 Commitment to Diversity, as well as other ruled prescribed by the District. Unsatisfactory performance or conduct in any area must be addressed.

COMMENT

COMPETENCY SECTION | TEXT ONLY

Mandatory Training

Compliance with Mandatory Training (NEW)

To be eligible for an overall rating of Meets Performance Expectations or above, the employee must be current with all mandatory training. To validate your employee's compliance, please check the NeoEd Learn module for online training records. If necessary, provide the employee with a reasonable deadline to complete outstanding training.

COMMENT

COMPETENCY SECTION | TEXT ONLY

Attendance

Absences (NEW)

Please indicate the number of absences for this performance evaluation period; this does not include any absences covered under an approved leave (e.g., authorized by the immediate supervisor/District or protected by federal/state leaves).

COMMENT

Tardiness (NEW)

Please indicate the number of tardies for this performance evaluation period; this does not include any tardies covered under an approved leave (e.g., authorized by the immediate supervisor/District or protected by federal/state leaves).

COMMENT

Overall Rating

Assess the employee’s overall performance based on demonstrated performance as provided by the comments and factor rating in the performance factors and on goal achievement. Preponderance of ratings for performance factors generally determines overall rating, but, employees who are rated as “Unsatisfactory” (“1” rating), in any performance factor, should be given an overall rating of no greater than “Needs Improvement” (“2” rating).

SCORE	NAME	COMMENT
5	Exceptional Performance	<div style="border: 1px solid black; width: 100%; height: 100%;"></div>
4	Exceeds Performance Expectations	
3	Meets Performance Expectations	
2	Performance Needs Improvement	
1	Unsatisfactory Performance	
0	N/A	

Rating Scales

5-Point Factor Scale (NEW)

SCORE	NAME	DESCRIPTION
5	Exceptional Performance	Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of department, college, or District objectives. This rating is achievable by any employee though given infrequently.
4	Exceeds Performance Expectations	Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent.
3	Meets Performance Expectations	Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good.
2	Performance Needs Improvement	Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.
1	Unsatisfactory Performance	Performance was consistently below expectations in most essential areas of responsibility. Significant improvement is needed in one or more important areas. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.
0	N/A	Not Applicable

5-Point Rating Scale (NEWNEW)

SCORE	NAME	DESCRIPTION
5	Exceptional Performance	Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of department, college, or District objectives. This rating is achievable by any employee though given infrequently.
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3	Meets Performance Expectations	Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good.
2	Performance Needs Improvement	Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.
1	Unsatisfactory Performance	Performance was consistently below expectations in most essential areas of responsibility. Significant improvement is needed in one or more important areas. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.

