



ADMINISTRATIVE PROCEDURE

CATEGORY: **Personnel, Classified Staff**

SUBJECT: **Evaluation of Classified Staff**

A. PURPOSE AND SCOPE

1. To outline administrative procedures governing evaluation of probationary and permanent employees. Refer to collective negotiation contracts for specific evaluation procedures relating to employees in office-technical and business services bargaining unit, operations-support services bargaining unit, and school police services bargaining unit.
2. **Related Procedures:**

Evaluation of classified temporary employees	7525
Employment status and status change of classified employees	7405

B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy I-6500; Collective Negotiations Contracts.

C. GENERAL

1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Human Resources Services Division, Deputy Superintendent Business.
2. **Definitions**
 - a. **Evaluation:** The careful, systematic appraisal of employee work performance by an employee's supervisor through use of performance evaluation reports, which provide a basis for employee counseling and which promote greater work efficiency along with high levels of employee morale.
 - b. **Supervisor:** Person responsible for assigning work and evaluating performance of an employee.
3. **Evaluation forms** for three major groups of classified employees are available:
 - a. Supervisory personnel
 - b. Paraeducator personnel
 - c. Classified employees except supervisory and paraeducator personnel

4. **Pre-evaluation counseling.** Prior to first scheduled evaluation, each new classified employee shall be given information about the district's performance evaluation form and program and about his/her supervisor's standards. Should an employee's performance fall short of a supervisor's standards, supervisor shall conduct subsequent counseling to ensure that employee has reasonable time to improve his/her performance prior to date of scheduled evaluation. Any supervisorial changes in performance standards must be made known to all affected employees before implementation.
5. **Scheduled Performance Evaluations**
 - a. **Probationary employees:** Evaluated at least twice; once prior to end of sixth month, and once prior to end of eleventh month of each employee's probationary period.
 - b. **Permanent employees:** Classified supervisory and school police services employees are evaluated every two years on anniversary date of employee's current placement. Other permanent classified employees are not subject to evaluation outside of probationary period, except to note a deficiency or for commendation.
6. **Unscheduled Performance Evaluations**
 - a. An unscheduled report for an employee may be prepared at any time by his/her supervisor. Such evaluation reports may be used to provide a record of either a marked deterioration or a significant improvement in employee performance between regularly scheduled evaluations, or for recording formal commendations for outstanding performance.
 - b. Upon request, at least one follow-up evaluation will be administered to a permanent employee based on individual's collective negotiations contract.
7. **Review.** A principal or department head (who is the supervisor of a classified employee) need not submit an evaluation on a subordinate to a higher level for review.
8. **Appeal.** Evaluation reports express the judgment and the opinions of supervisory authority, and as such are not subject to appeal under the Employment Regulations for the Classified Service of the San Diego Unified School District, *unless* a resultant

action has been taken to suspend, demote, or dismiss a *permanent* employee. However, any employee who has reason to question any aspect of his/her

performance evaluation report, or who is concerned about conditions of employment or any other matter affecting employee morale, has the right to request a review of his/her case at any time by the superintendent or designee.

D. IMPLEMENTATION

1. Evaluation of Permanent and Probationary Employees

- a. **Information and Technology Division** sends evaluation forms to schools and departments with return due dates indicated.
- b. **Rater (Supervisor)**
 - (1) Fills out evaluation report using appropriate form (C.3.); may consult immediate supervisor for additional information on employee's work performance.
 - (2) Confers with reviewer (next higher supervisor) prior to completion of evaluation reports whenever appropriate.
 - (3) **Food services managers and food services area managers** are evaluated by the Food Services Director or designee following consultation with site principal where the manager is placed; *other cafeteria employees* are evaluated by food services manager/area manager subject to review by the Food Services Director or designee.
 - (4) Conducts counseling interview with employee concerned.
- c. **Employee** reviews and signs evaluation report certifying that he/she has had an opportunity to review rating entries prior to transmittal to the Human Resource Services Division; may attach an additional signed statement to evaluation report if he/she wishes.
- d. **Reviewer**, if any, reviews and signs evaluation report.

Note: Changes in an evaluation report *made after employee has signed it* must be shown to that employee, and *both* employee and person making the change must initial revised item(s).

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- e. **School or department** sends original of completed form to the Human Resource Services Division, retains second copy for school or departmental files, and gives third copy to employee; *may destroy second copy upon employee's transfer or termination.*
- f. **Human Resource Services Division** retains evaluation report and any attached statements in employee's personnel file.

E. FORMS AND AUXILIARY REFERENCES

- 1. Performance Evaluation Reports (three-part forms) are furnished by the Human Resource Services Division for evaluation of supervisory personnel, paraeducator personnel, and other classified employees. They can also be found on the district's web site at www2.sandi.net/personnel.

F. REPORTS AND RECORDS

G. APPROVED BY



Interim General Counsel, Legal Services
San Diego Unified School District