Guide to Evaluating Classified Employees
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Introduction

Performance evaluations are an essential tool for any person who supervises or directs other employees. A performance evaluation not only measures employee performance, but can also help a supervisor determine the employee’s role in the district and advance the development of the employee.

Observation and evaluation of an employee’s work performance are two of the most important responsibilities for a supervisor. While a formal performance evaluation may be an annual event, continuous and effective communication year-round will make the evaluation process simple and less painful. Performance evaluations also send a message to employees that supervisors care about their performance.

This guide has been created to provide a basis for effective communication and feedback through the use of the performance evaluation and the follow-up evaluation conference.

Purpose of Evaluation

Performance evaluations serve many purposes. Below is a summary of the primary purposes for employee evaluation.

1. Communication: Effective evaluation is a continuous process. The formal evaluation process is to be a summary of on-going communications regarding an employee’s job performance. There should be NO SURPRISES for the employee when he/she receives the performance evaluation. Periodic discussions throughout the year should alert the employee of areas that are lacking or need improvement.

2. Contract Obligations: Based on agreements between the district and employee bargaining groups, regular employees receive a written performance evaluation annually between January 1 and May 1. Probationary employees receive a written evaluation at the end of the 5th and 11th month of initial employment.

3. Personnel Actions: The Human Resources department advises supervisors to use evaluations when considering eligibility for promotions and transfers. Human Resources also reviews evaluations when potential disciplinary action is recommended.

4. Employee Growth: The evaluation process is a method of developing job-related goals in terms of performance as well as assisting employees in
achieving their own personal goals and aspirations. The evaluation is also an important tool to identify an employee’s strengths and weaknesses.

**Preparing for Evaluation**

Preparation makes the evaluation process not only easier, but more effective and worthwhile. If a supervisor is responsible for the evaluation of more than one individual, it is helpful to create a timeline to allow for the completion of a meaningful evaluation and conference for each employee. The following are tips to review as part of the preparation process.

- **Review the job description**—consider the typical duties for the position as well as the skills, knowledge, and abilities required to perform the job in a satisfactory manner. The job description is a good frame of reference and should be used as a basis for the performance evaluation.

- **Review the entire period of time**—while it may be easier to concentrate on activities occurring in the past six months, it is important to review the entire period in order to provide a more accurate picture of the employee’s performance. Keep good notes throughout the year to avoid having to rely on memory.

- **Review performance and accomplishments**—be sure to document only objective, specific and relevant facts. Avoid making generalized statements or using subjective statements (i.e., “enthusiastic personality” vs. “has taken initiative to take on extra projects”). Evaluate the employee’s performance in terms of responsibilities and tasks that you have observed during the rating period. Include the tasks performed and the outcomes of the performance.

- **Avoid the “halo” and “horns” effects**—excellence in one area does not necessarily mean excellence in overall performance. Conversely, performing poorly in one area does not mean poor overall performance.

- **Analyze supervisory techniques**—review efforts in training and coaching the employee. Make allowances for lack of instruction or feedback, if applicable.

- **Dual supervision**—if there are other staff members who are also responsible for supervising the employee, be sure to discuss the employee’s performance with them. Incorporate their evaluation and comments into the review.
Completing the Performance Appraisal Report

Most classified, non-supervisory employees will be evaluated on the Performance Appraisal Report. However, Instructional Assistants, Bus Drivers, Custodians, Food Service, and Classified Subs have their own performance evaluation. Examples of each form are found at the end of this guide. Evaluation forms may be located on the San Juan Unified School District’s intranet under Forms & Documents, Human Resources.

Each evaluation is designed to provide supervisors with specific rating descriptions for several job performance factors. The supervisor is to choose a ranking for each factor ranging from unsatisfactory to outstanding and support the ranking with comments.

In addition to reading the “Instructions for Use” on each form, please keep the following items in mind.

- Ask the employee to provide a summary of his or her own performance for the year and review it thoroughly.

- Be sure to include enough information to clearly substantiate the rating. It may be necessary to attach supplemental sheets if there is not enough room on the form for detailed comments. Each additional sheet should be signed and dated in the same manner as the performance evaluation form itself.

- Indicate any special circumstances—such as new equipment, reorganization, workload, etc.—which influence your rating.

- Keep in mind not all individuals are the same. Take the time to analyze each employee carefully, and establish a ranking based on that individual.

- Length of service does not necessarily indicate better performance. Look at the employee’s performance within the job.

- Cite specific, observed behaviors or performances which exceed or do not meet standards. Include any additional information, such as the level, frequency, or impact of the work performed.

- It is important to include and identify future areas for growth in the performance evaluation. Performance goals should be prescribed or agreed upon, and recorded on the evaluation. The goals should include long and short-term goals to motivate and challenge the employee, as well as remediation goals to help improve identified weaknesses. It is important to establish REALISTIC goals, timelines and methods for monitoring progress.

- For the overall rating, evaluate all factor ratings and total performance for the time span being evaluated.
Preparing For the Evaluation Conference

Supervisors may feel that they have sufficiently prepared for the conference after they have spent considerable time and effort completing the performance evaluation. However, please keep in mind the following to ensure a successful meeting:

- Review all documentation prior to the meeting. This includes the performance evaluation, feedback from other supervisors or customers, letters or commendations received about the employee during the year, and notes from previous meetings with the employee.

- Schedule the conference at a time and place that is convenient to both parties. Make sure the meeting is free from interruptions from phone calls, e-mails and walk-ins.

- Plan your approach to the conference. Starting with positive areas or strengths may present a more conducive environment for discussion.

- Prepare for anticipated questions and/or concerns. The questions may be related to the performance evaluation, or may be regarding other topics such as organizational structure, career advancement, employee conflicts, etc.

- Review the preliminary strategy and/or goals for improving performance and/or reinforcing strengths.

- Develop questions to encourage employee comments or concerns. Listen carefully to the employee’s responses.

Remember, the conference is to mutually identify and establish standards of performance, as well as to develop and build trust, confidence, and respect between the supervisor and employee.
Conducting the Evaluation Conference

There is no “right” way to conduct the conference, but the following items may assist you.

• If the employee has not seen the format of the performance evaluation, explain the areas to be reviewed.

• Describe and discuss each factor. Present your rational for the rating and invite comments.

• Solicit input from the employee on how he/she would like to improve the position and/or performance; develop and mutually establish goals for both personal and professional growth.

• Review areas which need improvement. Describe and elaborate on the goals or plans outlined to improve performance. Convey support and belief that the employee has the capability to improve.

• Invite the employee to comment on the form in the space provided or submit a response (for attachment) if he/she wishes.

• Close the interview with the dating and signing of the form. The signatures indicate verification—not agreement—of the evaluation process. If the employee refuses to sign the performance evaluation, state the date and time the employee was asked to sign but refused.

• Schedule follow-up meetings as necessary to monitor progress on goals.
Special Situations

The following are guidelines to be used when completing evaluations for the unsatisfactory employee, the probationary employee, and employees who have a special performance evaluation form (Instructional Assistants, Bus Drivers, Custodians, Food Service, and Classified Subs).

**The Unsatisfactory Employee**

The performance evaluation is an essential part of the process to improve the performance of an unsatisfactory employee. Documenting weaknesses, developing goals and a plan to improve performance are very important steps in assisting the employee. This shows the employee the severity of deficiencies and provides documentation should a “paper trail” become necessary in the future.

In preparing an evaluation for an employee needing improvement, you may want to answer the following questions.

- What resources, as a supervisor, are you able to provide to assist the employee in improving? This could include training, more time for meetings/reviews, reference material and/or equipment.

- Can you clearly detail in objective terms the level, frequency and/or impact of unsatisfactory performance? Generalized statements are difficult for the employee to assess and difficult for you to defend.

- What are the consequences of poor performance in terms of the students, school, department or other staff members? The consequences of poor attendance, quality or quantity of work and/or human relations skills are very important. In each area the consequences may affect students, work product, or other staff members in varying degrees.

- When you communicate unsatisfactory performance, be able to discuss the following for each area determined to be less than satisfactory.
  - Acceptable standards of performance for the specific position.
  - Observed or documented poor performance by employee.
  - Impact of poor performance, and method to improve performance.
  - When and how improved performance is to be monitored and consequences if performance improvement does not occur.

If overall performance remains unsatisfactory, review the Due Process procedures or consult the FRISK documentation manual and contact Human Resources for assistance.
The Probationary Employee

Probationary employees receive a performance evaluation during the 5th and 11th month of employment. These evaluations serve the same purpose as discussed earlier in terms of communication, contract obligations and employee growth. More importantly, this evaluation also indicates, based on supervisory evaluation and judgment, the recommendation of permanent status for the employee.

The direct observation and evaluation of a probationary employee is a very important supervisory function. The supervisor is responsible for determining if the employee has the skills, knowledge and abilities to successfully perform the duties and responsibilities as described in a specific job description.

If any performance appears less than satisfactory, and/or you want to recommend that the employee be released during their probationary period, you should contact the Director of Classified Human Resources immediately.

Special Evaluation forms

Due to the nature of their work, Instructional Assistants, Bus Drivers, Custodians, Food Service, and Classified Subs have separate performance evaluation forms. These forms are designed to specifically address certain knowledge, skills and abilities unique to the job.

The same methods of evaluation preparation are applicable. It is important to receive feedback from other staff members who work directly with the employee to recognize strengths and/or weaknesses.

Each form has a set of instructions which are to be reviewed prior to completion.

Classified Substitutes

The district uses numerous classified substitutes in a variety of positions. A simplified evaluation form has been developed to assist supervisors and the Human Resources department in evaluating potential permanent employees and terminating substitutes that are not working at a satisfactory level.

The form can be used after a substitute has performed work at a site for three days, or has shown obvious poor performance and/or misconduct. Three days is sufficient to provide a supervisor with some initial observations and judgments regarding performance.

When an unsatisfactory evaluation is received, Human Resources will meet with the substitute, check other evaluations of work performance and then make a decision as to the continued use of that substitute. As with all evaluations, specific information or observed behaviors is important.
Conclusion

If you need assistance during the performance evaluation process, the Classified Human Resources Department is available to assist you.

- Peggy Purvis, Director, Human Resources
  o (916) 971-7251
  o ppurvis@sanjuan.edu

- Vivian Weitzel, Analyst, Human Resources
  o (916) 971-7107
  o vweitzel@sanjuan.edu

- Diana Christensen, Analyst, Human Resources
  o (916) 971-7658
  o diana.christensen@sanjuan.edu

- Vacant, Administrative Assistant, Human Resources
  o (916) 971-7251

Thank you for your time and attention to this important matter.
Appendix A— Classified Performance Evaluation

PERFORMANCE APPRAISAL REPORT

Employee Name: 
Classification Title: 
location Notes: 
Date: 

Type of Evaluation (check appropriate box)

Permanent: 
Annual: 
Monthly: 
Probationary: 
Unscheduled Evaluation: 

1. WORK HABITS: 
Compliance with rules, care of supplies, maintenance of appearance of work area is as follows:

OUTSTANDING: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

2. ATTENDANCE & PUNCTUALITY: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

3. HUMAN RELATIONS: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

4. WORK RESPONSIBILITIES: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

5. QUALITY OF WORK: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

6. QUANTITY OF WORK: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

7. DISRUPTIVE BEHAVIOR: 

MEETS STANDARDS: 
NEEDS IMPROVEMENT: 
UNSATISFACTORY: 

REMARKS: attach extra sheet if necessary.

8. IDENTIFY AREAS FOR FUTURE GROWTH: 

SUPERVISOR: 
GENERAL COMMENTS:

INTERNAL EVALUATION (CHECK OVERALL PERFORMANCE) 

OUTSTANDING 
MEETS STANDARDS 
NEEDS IMPROVEMENT (SOME AREAS) 
UNSATISFACTORY 

FOR PROBATIONARY EMPLOYEES: I RECOMMEND THIS EMPLOYEE FOR CONTINUING EMPLOYMENT 

Y 
N

ADVISER'S SIGNATURE: 
DATE: 

EMPLOYEE: I certify that this report has been discussed with me. I understand my signature does not necessarily indicate an agreement and that I may prepare a written comment which will be attached to this evaluation on my personnel file.

SUPERVISOR'S SIGNATURE (Employee): 
DATE: 

SIGNATURE: 
DATE: 

Original - Classified Personnel Office 2nd Copy - Superintendent 3rd Copy - Employee
Appendix B—Instructional Assistants Evaluation

<table>
<thead>
<tr>
<th>Classified Personnel Department</th>
<th>Performance Evaluation Report</th>
<th>San Juan Unified School District</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee name</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Classification title</td>
<td>Due date</td>
<td>Location name</td>
</tr>
<tr>
<td>Type of Evaluation (Check appropriate box)</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Permanent, Annual</td>
<td>5 Month Probationary</td>
</tr>
<tr>
<td></td>
<td>11 Month Probationary</td>
<td>Unscheduled Evaluation</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Evaluator Comments: Areas marked as "Needs Improvement" or "Not Satisfactory" must include specific statements of deficiencies and specific recommendations for improvement. Areas marked as "Exceeds Standards" require specific strengths.

Please read instructions on flip side before completing this form.

I. Work Habits/Knowledge
   - **A. Attendance**
     - Excused/frequent absences.
   - **B. Observance of work hours**
     - Arrival, departure, rest periods.
   - **C. Efficiency**
     - Uses time to best advantage.
   - **D. Initiative**
     - Is able to see tasks which need to be done and does them.
   - **E. Organization**
     - Appearance of work area.
   - **F. Confidentiality**
     - Maintains a professional attitude towards all aspects of the school program.
   - **G. Understands school programs/policies**
     - SP, Title 1, bilingual ed., special ed., etc...

II. Interaction with adults
   - **A. Communication**
     - Communicates well with supervising teachers and other adults and demonstrates a willingness to exchange ideas and express needs. Has the following directions and accepts suggestions.
   - **B. Direct involvement with adults**
     - Is able to work harmoniously with staff and parents.

III. Interaction with students
   - **A. Communication**
     - Is able to communicate with students in a positive manner. Is consistent with the teaching and discipline philosophy of the school.
   - **B. Direct involvement with students**
     - Is consistent and provides, at the direction of the supervisor or teacher, effective instructional and/or other assistance to individuals or groups of students needing reinforcement in specific skill areas.

IV. Quality of work not directly involving students
   - **A. Clerical/record keeping**
     - Maintains neat/natural titles and records.
   - **B. Production of educational materials**
     - i.e., handbooks, folders, etc...

Summary Evaluation—Check overall performance
- [ ] Exceeds Standards
- [ ] Effective—Meets Standards
- [ ] Requires Improvements
- [ ] Not Satisfactory

Do you recommend this employee for permanent status? [ ] Yes [ ] No
Evaluator's Signature ____________________________
Date ____________________________
Evaluator's comments (May attach additional comments)

Reviewer's Signature ____________________________
Date ____________________________
Evaluator's Signature ____________________________
Date ____________________________

*Source: SanJuanOA/EnFoil.htm*Rev 2007

Original copy—Classified Personnel • 2nd copy—Employee • 3rd copy—Department
Appendix C—School Bus Driver Evaluation

SAN JUAN UNIFIED SCHOOL DISTRICT
SCHOOL BUS DRIVER PERFORMANCE EVALUATION

<table>
<thead>
<tr>
<th>Employee Name</th>
<th>Classification Title</th>
<th>Location</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Type of Evaluation (Check Appropriate Box)</td>
<td>☐ Permanent, Annual</td>
<td>☐ 5 month Probationary</td>
<td></td>
</tr>
<tr>
<td></td>
<td>☐ 11 Month Probationary Evaluation</td>
<td>☐ Unscheduled Evaluation</td>
<td></td>
</tr>
</tbody>
</table>

1. WORK RESPONSIBILITIES:
   Overall for this category: ☐ Exceeds Standards ☐ Meets Standards ☐ Below Standards

Exceeds Standards:
- Maintains bus in a clean & safe condition (i.e. sweeps bus, cleans mirrors and windows, removes trash).
- Performs daily bus check out.
- Understands and uses proper radio procedures.
- Reads transportation office bulletin boards daily and adheres to or follows the directives, memos, procedures, etc. that are posted.
- Checks for notes/messages in driver’s box at the beginning and end of each shift.
- Enters correct information on fueling card lock system.

Below standards:
- Bus is not cleaned and swept daily.
- Bus check out is not performed daily.
- Has not learned or does not use proper radio procedures.
- Does not follow the directives, memos, procedures, etc. posted on the bulletin boards.
- Does not check for notes/messages in the driver’s box.
- Enters incorrect fueling card information.

2. HUMAN RELATIONS:
   Overall for this category: ☐ Exceeds Standards ☐ Meets Standards ☐ Below Standards

Exceeds Standards:
- Helps create positive solutions for resolving problems and concerns and suggests positive means for increasing communications.
- Frequent volunteer for committees or group meetings (safety, rodeo, etc.).
- Frequent volunteer to help in the office when needed or in other transportation areas when needed.

Meets Standards:
- Responds to students, staff, coworkers and the public in a friendly, courteous and helpful manner.
- Develops and maintains effective student discipline on the bus.
- Cooperates, when asked, to do additional routing and/or other job related duties.
- Effectively communicates problems to supervisors, principals and/or management and suggests possible solutions.

Below Standards:
- Knows about problems but does not identify them to management or supervisors.
- Displays a negative attitude toward students, staff, coworkers or the public.
- Lacks effective discipline on the bus.
- Receives complaints from management, parents and/or coworkers.

3. QUALITY OF WORK:
   Overall for this category: ☐ Exceeds Standards ☐ Meets Standards ☐ Below Standards

Exceeds Standards:
- Maintains a driving record free of accidents, and has no more than 2 incidents.
- Runs route on time.
- Maintains professionalism under stress.
- Notifies dispatch when running excessively late (over 10 minutes).

Page 1 of 2
Below Standards:
- Has a preventable accident or more than 2 incidents.
- Displays a temper, uses foul language or obscene gestures when angry or upset.
- Runs behind schedule.
- Fails to notify dispatch when he/she is running late.

4. RECORD KEEPING:
Overall for this category:  □ Exceeds Standards □ Meets Standards □ Below Standards

Exceeds Standards:
- Reports, time cards, mileage sheets, repair orders, trip sheets, and other related paperwork/forms are always completed accurately, are legible and submitted on time. No follow up is required from a supervisor or the manager.

Meets Standards:
- Keeps route, mileage sheets and bus fee information up to date.
- Turns in repair orders as needed.
- Completes and submits time cards accurately, legible and on time.
- Completes and submits trip sheets/requisitions accurately, legible and on time.
- Submits reports and/or other related paperwork/forms accurately, legible and on time.

Below Standards:
- Route, mileage sheets and/or bus fee information are not kept up to date.
- Does not turn in repair orders as needed.
- Completes time cards inaccurately, illegibly or submits them late.
- Completes trip sheets/requisitions inaccurately, illegibly or submits them late.
- Submits reports and/or other related paperwork/forms that are inaccurate, illegible and/or not on time.

5. ATTENDANCE/DISCIPLINE:
Overall for this category:  □ Meets Standards □ Below Standards

Meets Standards:
- Always notifies dispatch or the supervisor if employee is reporting late.
- When absent, consistently notifies dispatch by 2:00 p.m. of the day absent of his/her ability to work the following day.
- Good observance of work hours/schedule: minimal absences from work.

Below Standards:
- Fails to notify dispatch or the supervisor when employee is late.
- When absent, fails to notify dispatch by 2:00 p.m. of the day absent of his/her ability to work the following day.
- Excessive absenteeism and/or tardiness.

OVERALL EVALUATION:  □ Exceeds Standards □ Meets Standards □ Below Standards
For Probationary Employees Only: I recommend this employee for continuing employment: □ Yes □ No

Supervisor Comments:

Employee Comments:

Ratee’s Signature: ____________________________
Title: ____________________________ Date: ________

Reviewer’s Signature: ____________________________
Title: ____________________________ Date: ________

Employee: I certify this report has been discussed with me. I understand my signature does not necessarily indicate agreement and that I may prepare a written response which will be attached to this evaluation in my personnel file.

Original, Classified Personnel office; Second Copy to Supervisor; Third Copy to Employee
# Appendix D—Custodial Performance Evaluation

<table>
<thead>
<tr>
<th>EMPLOYEE NAME</th>
<th>CLASSIFICATION TITLE</th>
<th>LOCATION NAME</th>
<th>DUE DATE</th>
</tr>
</thead>
</table>

Type of Evaluation:  
- [ ] Permanent/Annual  
- [ ] 5 Month Probationary  
- [ ] 11 Month Probationary  
- [ ] Unscheduled  

Please read instructions on reverse side before completing this form.

## 1. Attendance/Tardiness

Overall rating for this category:  
- [ ] Exceeds Standards  
- [ ] Meets Standards  
- [ ] Approaching Standards  
- [ ] Below Standards

(See Instructions**)

**Exceeds Standards:**
- In addition to meeting standards, the employee is rarely absent.

**Meets Standards:**
- Always notifies site and Custodial Services in a timely manner if intending to be absent or late to work.
- Good observance of work hours, schedules; minimal absences from work.
- Tends to complete projects in a timely manner.

**Below Standards:**
- Frequently fails to notify site and Custodial Services if intending to be absent or late to work.
- Frequently absent or late to work.
- Fails to turn in absence reports in a timely manner.

Remarks/Recommendations:

## 2. Work Responsibilities

Effective use of time, meeting deadlines, complying with rules, policies and verbal, written instructions. Care of equipment and workstations. Working without close supervision.

Overall rating for this category:  
- [ ] Exceeds Standards  
- [ ] Meets Standards  
- [ ] Approaching Standards  
- [ ] Below Standards

(See Instructions**)

**Exceeds Standards:**
- Complies with all work rules and policies. Always follows written and oral instructions.
- Takes excellent care of custodial equipment and tools. Work station always clean and orderly.
- Takes minimum direction/supervision, highly successful, and reliable; takes steps to accomplish tasks without being asked.
- Effectively coordinates/directs the overall cleaning of the site and takes corrective actions.
- (Lead and head custodians only.)
- (Possesses strong leadership qualities and effectively instructs/trains subordinate custodial staff. (Lead and head custodians only.)
- (Is very organized regarding records, work orders and documents. (Lead and head custodians only.)

**Meets Standards:**
- Generally observes work rules and policies. Generally complies with written and oral instructions.
- Takes adequate care of custodial equipment and tools. Work station in general meets the job requirement.
- Coordinates/directs the overall cleaning of the site and identifies maintenance needs. (Lead and head custodians only.)
- (Adequately instructs/trains subordinate custodial staff. (Lead and head custodians only.)
- (Satisfactorily organizes records, work orders and documents. (Lead and head custodians only.)

**Below Standards:**
- Does not comply with work rules and policies. Has difficulty understanding and following written and oral instructions.
- Does not demonstrate respect or care for custodial equipment, tools or workstations.
- Requires close supervision, does not always complete assigned tasks.
- Fails to consistently coordinate/direct the overall cleaning of the site and identify maintenance needs.
- (Lead and head custodians only.)
- Fails to effectively instruct/train subordinate custodial staff. (Lead and head custodians only.)
- Fails to keep accurate records, work orders and documents. (Lead and head custodians only.)

Remarks/Recommendations:
Employee Name: 

3. Human Relations: Public and pupil contact; employee contacts and interaction.

Overall rating for the category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
- Always works cooperatively with others.
- Actively promotes good relations even in difficult situations.
- Consistently coordinates well with administrators, supervisors and staff.

Meets Standards:
- Generally works cooperatively with others.
- Gets along well with co-workers, staff and public.
- Communicates effectively with administrators, supervisors and staff.

Below Standards:
- Frequently uncooperative. Receives complaints from administrators, staff and/or public.
- Displays a negative attitude towards administration, staff, co-workers and/or public.
- Fails to communicate or identify concerns to administrators, supervisors or staff.

Remarks/Recommendations:

4. Quality of Work: the accuracy and thoroughness with which work meets district standards; job skill level; work judgment; effectiveness under stress.

Overall rating for the category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
- Quality of work consistently exceeds district cleaning standards/maintenance custodian guidelines.
- Consistently makes sound decisions in any situation.
- Exhibits a high level of skill even under pressure.

Meets Standards:
- Quality of work meets district cleaning standards/maintenance custodian guidelines.
- Makes decisions that are appropriate to the situation.
- Performs satisfactorily under pressure.

Below Standards:
- Quality of work fails to meet district cleaning standards/maintenance custodian guidelines.
- Uses poor judgment/makes inappropriate decisions.
- Has difficulty performing satisfactorily under pressure.

Remarks/Recommendations:

5. Quantity of Work: Does the amount of work produced meet district standards for work assignments?

Overall rating for this category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
- Quantity of work consistently exceeds standards for work assignments.

Meets Standards:
- Quantity of work meets standards for work assignments.

Below Standards:
- Fails to complete work assignments.

Remarks/Recommendations:
(Check overall performance)

Overall Evaluation: □ Exceeds Standards □ Meets Standards □ Approaching Standards □ Below Standards

(See Instructions**)

For Probationary Employees Only: I recommend this employee for continuing employment: □ Yes □ No

If "NO", contact Director, Classified Personnel immediately.

Supervisor Comments: ____________________________

Employee Comments: ____________________________

Rater’s Signature: ____________________________ Date: ____________________________

Reviewer’s Signature: ____________________________ Date: ____________________________

Employee: I certify this report has been discussed with me. I understand my signature does not necessarily indicate agreement and that I may prepare a written response which will be attached to this evaluation in my personnel file.

Signature: ____________________________ Date: ____________________________

**INSTRUCTIONS FOR USE OF THE PERFORMANCE APPRAISAL REPORT**

The observation and evaluation of an employee’s work performance are two of the primary responsibilities of any person who supervises or directs other employees. The effective communication of this evaluation to the employee is essential. When used thoughtfully and carefully, this form is intended to aid the employee and the supervisor in arriving at an understanding of the employee’s performance in a given position. This evaluation will become part of the employee’s personnel file and will be considered in decisions involving promotion and transfer.

PROBATIONARY EMPLOYEES: The probation period is the final and most important step in the selection process. It is crucial that probationary employees meet or exceed district performance standards in order to be recommended for permanent status. Probationary employees may be released at any time during their first year of service without appeal, if in the judgment of the supervisor, dismissal is in the best interests of the district. If a decision is made to release a probationary employee, the Director of Classified Personnel should be contacted immediately, and it is critical that time lines for evaluation be observed.

BEFORE YOU BEGIN:
1. Understand thoroughly duties and requirements of the position to be evaluated.
2. Use a process of objective reasoning – for example, don’t allow your personal likes or dislikes of certain mannerisms or aspects of personal appearance affect your assessment of work performance.
3. Don’t assume that excellence in one category implies excellence in all categories – rate the employee’s performance objectively on each category on the rating form.
4. Consider unusual circumstances such as employees you have observed for less than six weeks, employees whose performance has slipped as a result of temporary illness, health or other unavoidable conditions. In all unusual circumstances, evaluate the work performance, but comment fully to indicate related reasons.

GENERAL:
1. This form is to be used for custodial personnel only, including custodians, lead custodians, high school maintenance custodians and head custodians.
2. All signatures must be in ink. Changes and corrections must be initialed by the employee.
3. Use the spaces for comments – thoughtful comments give the most complete picture of the employee’s performance and also make the evaluation more meaningful to the employee. If space for comments is inadequate, similarly dated and signed attachments may be made. Ratings other than "meets standards" require comments.
4. Due dates must be observed and are particularly important for final probationary reports.
5. Unscheduled reports may be filed at any time and are an excellent way of commending outstanding performance or documenting unsatisfactory performance.
6. All performance evaluation reports in an employee’s personnel file may be reviewed when an employee is considered for transfer or promotion.

(Continued)
Appendix E—Food Services Performance Evaluation

SAN JUAN UNIFIED SCHOOL DISTRICT
FOOD SERVICES PERFORMANCE EVALUATION

EMPLOYEE NAME:  
CLASSIFICATION TITLE:  
LOCATION NAME:  
DUE DATE:  

Type of Evaluation:  □ Permanent □ Annual □ 5 Month Probationary □ 11 Month Probationary □ Unscheduled  
Please read instructions on reverse side before completing this form.

1. Attendance/Tardiness

Overall rating for this category:  □ Exceeds Standards □ Meets Standards □ Approaching Standards □ Below Standards (See Instructions***)

Exceeds Standards:
□ Always meets the Food Service Office in a timely manner if attending to be absent or late to work.
□ Good observance of work hours, schedules; minimal absences from work.
□ Turns in absence reports in a timely manner.

Meets Standards:
□ Always notifies the Food Service Office in a timely manner if attending to be absent or late to work.
□ Frequently absent or late to work.
□ Fails to turn in absence reports in a timely manner.

Remarks/Recommendations:

2. Work Responsibilities:  Effective use of time, meeting deadlines, complying with rules, policies and variances, written instructions.  Care of equipment and work stations.  Working without close supervision.

Overall rating for this category:  □ Exceeds Standards □ Meets Standards □ Approaching Standards □ Below Standards (See Instructions***)

Exceeds Standards:
□ Completes all work rules and policies.  Always follows written and oral instructions.
□ Takes excellent care of food service equipment and utensils.  Work station always clean and orderly.
□ Requires minimum direction/supervision; highly resourceful, self reliant, takes steps to accomplish tasks without being asked.
□ Effectively coordinates/directs the overall food preparation, serving and cleanup of the work station and takes corrective action without direction (satellite food service worker only).
□ Possesses strong leadership qualities and effectively instructs/trains food service workers and student helpers (satellite food service worker only).
□ Consistently and timely in completion and organization of records, work orders and documents (satellite food service worker only).

Meets Standards:
□ Generally observes work rules and policies.  Generally complies with written and oral instructions.
□ Takes adequate care of food service equipment and utensils.  Work station in general meets the job requirement.
□ Requires minimal supervision and direction, will perform work related duties.
□ Satisfactorily coordinates/directs the overall food preparation, serving and cleanup of the work station (satellite food service worker only).
□ Adequately instructs/trains food service workers and student helpers (satellite food service worker only).
□ Satisfactorily organizes records, work orders and documents (satellite food service worker only).

Below Standards:
□ Does not comply with work rules and policies.  Has difficulty understanding and following written and oral instructions.
□ Does not demonstrate respect or care for food service equipment, utensils or work station.
□ Requires close supervision, does not always complete assigned tasks.
□ Fails to consistently coordinate/direct the overall food preparation, serving and cleanup (satellite food service worker only).
□ Fails to effectively instruct/trains food service workers and student helpers (satellite food service worker only).
□ Fails to keep accurate records, work orders and documents (satellite food service worker only).

Remarks/Recommendations:

* Refers to satellite food service workers only.
Employee Name

3. Human Relations: Public and pupil contact; employee contacts and interaction.

Overall rating for the category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
[ ] Always works cooperatively with others.
[ ] Actively promotes good relations even in difficult situations.
[ ] Consistently interacts and communicates well with administrators, supervisors and staff.

Meets Standards:
[ ] Generally works cooperatively with others.
[ ] Gets along with co-workers, staff and public.
[ ] Generally interacts and communicates effectively with administrators, supervisors and staff.

Below Standards:
[ ] Is frequently uncooperative. Receives complaints from administrators, staff and/or public.
[ ] Displays a negative attitude towards administration, staff, co-workers and/or public.
[ ] Fails to effectively communicate or interact with administrators, supervisors or staff.

Remarks/Recommendations:

______________________________

4. Quality of Work: The accuracy and thoroughness with which work meets district standards, job skill level, work judgment, effectiveness under stress.

Overall rating for this category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
[ ] Quality of work consistently exceeds food preparation, serving and clean-up standards.
[ ] Consistently makes sound decisions in any situation.
[ ] Exhibits a high level of skill even under pressure.

Meets Standards:
[ ] Quality of work meets food preparation, serving and clean-up standards.
[ ] Makes decisions that are appropriate to the situation.
[ ] Performs satisfactorily under pressure.

Below Standards:
[ ] Quality of work fails to meet food preparation, serving and clean-up standards.
[ ] Uses poor judgment/makes inappropriate decisions.
[ ] Has difficulty performing satisfactorily under pressure.

Remarks/Recommendations:

______________________________

5. Quantity of Work: Does the amount of work produced meet district standards for work assignments?

Overall rating for this category: [ ] Exceeds Standards [ ] Meets Standards [ ] Approaching Standards [ ] Below Standards (See Instructions**)

Exceeds Standards:
[ ] Quantity of work consistently exceeds standards for work assignments.

Meets Standards:
[ ] Quantity of work meets standards for work assignments.

Below Standards:
[ ] Fails to complete work assignments.

Remarks/Recommendations:

______________________________
**INSTRUCTIONS FOR USE OF THE PERFORMANCE APPRAISAL REPORT**

The observation and evaluation of an employee's work performance are two of the primary responsibilities of any person who supervises or directs other employees. The effective communication of this evaluation to the employee is essential. When used thoughtfully and carefully, this form is intended to add to the employee's and the supervisor in arriving at an understanding of the employee's performance in a given position. This evaluation will become part of the employee's personnel file and will be considered in decisions involving promotion and transfer.

**PROBATIONARY EMPLOYEES:** The probationary period is the final and most important step in the selection process. It is crucial that probationary employees meet or exceed stated performance standards in order to be recommended for permanent status. Probationary employees may be released at any time during their first year of service without appeal, if in the judgment of the supervisor, dismissal is in the best interests of the district. If a decision is made to release a probationary employee, the Director of Classified Personnel should be contacted immediately, and it is critical that this form be completed and submitted.

**BEFORE YOU BEGIN:**

1. Understand thoroughly the duties and responsibilities of the position prior to evaluating.
2. Use a process of objective rating – for example, don't allow your personal likes or dislikes of certain circumstances or aspects of personal performance to affect your assessment of work performance.
3. Don't assume that excellence in one category implies excellence in all categories – rate the employee's performance objectively on each category on the rating form.
4. Consider normal circumstances such as poor weather, health, or other unavoidable conditions in all unusual circumstances. Evaluate the work performance, but comment fully to indicate related reasons.

**GENERAL:**

1. This form is to be used for all service workers, cooks, and service workers only.
2. All ratings must be set in ink. Changes and corrections must be initialed by the supervisor.
3. Use the spaces for comments. Thoughtful comments give the most complete picture of the employee's performance and also make the evaluation more meaningful to the employee. If space for comments is inadequate, another sheet or signed attachment may be made. Ratings other than "meets standards" require comments.
4. Dates determined and any particularly important for final probationary reports.
5. Unobstructed reports may be filed at any time and are an excellent way of commending outstanding performance or documenting unsatisfactory performance.
6. All performance evaluation reports in an employee's personnel file may be reviewed when an employee is considered for transfer or promotion.

**CATEGORIES 1 THROUGH 5:** Choose the phrase which is most descriptive of the employee's performance. Place an X in the appropriate space. Ratings other than "meets standards" require comments. **"Below standard"** rating must be discussed with employees sufficiently prior to evaluation to allow time to effect changes necessary to meet standards. Deficiency areas must be documented at this time with specific recommendations for improvement and must be attached to this performance evaluation if it notes such deficiencies.

**GENERAL COMMENTS:** This section may be used for general comments by both the supervisor and the employee. Communication is a "two-way" process, and employees should be encouraged to provide comments or suggestions.

**OVERALL EVALUATION:** Check the overall performance here, taking into account all factors and total performance over the full period of service being evaluated.

**Exceeds Standards:** Total performance is well above normal standards for the position.

**Meets Standards:** Consistently excellent performance meeting or somewhat above standards.

**Approaching Standards:** Reflects performance where minor deficiencies noted, or where performance requires minor growth/development.

**Below Standards:** Performance periodically or regularly falls short of normal standards in some areas. **"Below standard"** rating must be discussed with employees sufficiently prior to evaluation to allow time to effect changes necessary to meet standards. Deficiency areas must be documented at this time with specific recommendations for improvement and must be attached to this performance evaluation if it notes such deficiencies.

**SIGNATURES:** Both the rater and the employee shall date and sign the report. The employee's signature indicates the conference has been held and that the employee has had an opportunity to read the report. If the employee is unable to sign for any reason, explain that his/her signature does not necessarily imply or indicate agreement with the report, and that the employee's written response may be attached to the evaluation. Further refusal to sign shall be recorded.
Appendix F—Classified Substitute Evaluation

San Juan Unified School District
CLASSIFIED SUBSTITUTE EVALUATION

This evaluation is to be completed by school of assignment upon completion of three (3) consecutive days of service, or as otherwise deemed necessary. White original and yellow copy to be forwarded to Substitute Services. Pink copy to be retained in the department/site office. Yellow copy to be routed to substitute via Substitute Services.

<table>
<thead>
<tr>
<th>Substitute Employee</th>
<th>Name</th>
<th>Assigned Dates</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>EVALUATION</th>
<th>COMMENTS</th>
</tr>
</thead>
</table>

**GENERAL:**
- Punctuality
- Adaptability
- Attitude

**JOB PERFORMANCE:**
- Ability to work effectively with students & staff
- Ability to follow written and oral instructions
- Pupil management skills (if applicable)
- Writing, spelling, and grammar skills

**CLERICAL ONLY:**
- Typing Skills

**OTHER: (Please Specify)**

Do you wish to have this substitute return to future assignments?  □ Yes  □ No
(If no, please explain)

Comments:


Administrator’s/Supervisor Signature  Site/School/Department  Date

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Retained by Personnel Division