



**SOUTH UMPQUA**  
**SCHOOL DISTRICT**

Unlocking Unlimited Potential in Every Student

# Classified Evaluation Handbook

## STANDARDS

The indicators that identify aspects of each employee's work are organized into four domains: Planning and Organizing, Communication and Interpersonal Skills, Job Performance, Professionalism/Follows District Policies and Safety Procedures. District workplace expectations are also woven into these domains and are not listed separately.

## PERFORMANCE LEVELS

Each indicator within the four domains are evaluated using four performance levels: Does not meet, Progress towards meeting, Meets expectations and Exceeds expectations.

**Does not meet:** *The employee's performance is insufficient to meet the standards. Performance is unacceptable at this level.*

**Progress towards meeting:** *The employee is beginning to develop a basic understanding of the standards. Improvement is needed to meet the standard consistently.*

**Meets expectations:** *The employee clearly understands the concepts of the standards and consistently demonstrates understanding as evident through their work performance. The terms "regularly," "often," and "is evident" are words that describe an employee's performance at the proficient level.*

**Exceeds expectations:** *Consistently surpasses standards as evident through work performance.*

## DEFINITIONS

**Goal Setting:** Short-range annual goal(s) pertaining to one's job responsibilities and/or professional growth, intended to enhance job performance and professional growth.

**Supervisor:** A supervisor for Oregon school classified employees is the individual responsible for evaluating employees within their assigned department or building. This

may include roles such as the building principal for school-based staff or a district supervisor for department-level employees. Supervisors must be non-bargaining unit employees, ensuring they are not members of the same collective bargaining agreement as those they oversee.

**Performance Evaluation:** Completed annually by June 1<sup>st</sup> for all employees; at the end of the probationary period for new employees and again by the end of the first year of employment.

**Input for Evaluation:** **Evaluation** of performance should include input from a variety of sources if possible, including:

- Information regarding accomplishment or progress on goal achievement
- Observational data by teachers and supervisors
- Attendance data
- Safety records
- Products of employee's work
- Concerns/complaints
- Professional development, coursework, workshops, continuing education records

**Evaluation Conference:** The conference between the supervisor and the employee to discuss performance based on the domains and the goal(s). The employees should be prepared to share performance progress they believe they have demonstrated. The supervisor will share the performance evaluation.

## ***PERFORMANCE GOALS***

### **Goal Criteria**

1. Performance goals are designed to encourage professional growth and improve job skills and job performance.
2. Performance goals will be developed collaboratively between the employee and their supervisor. The supervisor will assess all performance goals and may adjust goals to meet specific needs.
3. Performance toward meeting performance goals will be considered during evaluations.
4. Performance goals will pertain to specific area(s) of the employee's job responsibilities, professional growth, and the Domains of Professional Practice.

5. Performance goals will be written in the SMART goal format.
6. Training and/or supports will be available to assist employees in writing performance goals.

## **GUIDELINES FOR EMPLOYEES**

In advance of each evaluation meeting, the district encourages employees to reflect on their progress toward meeting their performance goals. Specific examples and/or objective data and documentation supporting progress should be obtained by the employee prior to the evaluation meeting.

For all permanent employees, they will be required to develop performance goals. A meeting will be completed within the evaluation timeline to establish the performance goals.

For probationary employees, performance goal progress should be measured in the first 90 days of employment. The supervisor may establish new goals at each evaluation period. In some cases, the supervisor will prescribe performance goals based on the areas of concern or a shift in the job responsibilities.

## ***CLASSIFIED EVALUATION PROCESS***

### Directions for New Employees

When Hired:

1. Read the Classified Employee Performance Evaluation Handbook.
2. Specifically review the Classified Evaluation Rubric describing the domains, components and levels of performance
3. Complete the Goals form within the first 30 days of employment (with support from your supervisor)
4. Within the first 30 days of employment, Supervisor will conduct a goals conference

At end of probationary period:

1. Read and review the Classified Evaluation Rubric to consider growth made during the probationary period.
2. During the probationary period, Supervisor may ask for input certified staff or department leads for input on the evaluation.
3. At the end of the probationary period, Supervisor will complete the Evaluation Form and conference.

## **Directions for Permanent Employees**

Fall before Goal Setting:

1. Read and review the Classified Evaluation Form describing the domains, components and levels of performance. (employee may request meeting with supervisor for clarification or guidance regarding SMART Goals)
2. Complete the Classified Goals Form using the SMART Goal Format by October 31.
3. By January, the Supervisor will conduct a goals conference

Spring before Evaluation:

1. Review your personal SMART Goals. Reflect on your progress, or lack of progress, towards accomplishing your personal Classified Performance Goal(s). Employees are encouraged to document how performance goals have been met during the evaluation period. Be prepared to share specific examples and/or objective data. If you have any other examples documenting progress made towards goal attainment, it should be shared with the supervisor at the time of the evaluation conference.
2. By June 1st, the Supervisor will conduct a year-end Performance Evaluation and discuss possible goals for the following year.

## **CLASSIFIED PROBATIONARY EMPLOYEE TIMELINE**

Article 1: C. A probationary, classified employee shall be notified in writing at the end of their six (6) months probationary period (or five [5], as applicable) as to the termination of their probationary status or their employment. The district will comply with ORS 332.544 as it relates to the dismissal, demotion, or discipline of probationary employees.

Evaluation Cycle*	Probationary
August/September or upon hire.	Supervisors notify employees of the evaluation process, timeline, and expectations. Distribute evaluation forms and review the process during team or individual meetings.
October or first 30 days of employment	Supervisor and Employee completes the Goals form using the SMART Goal Format
January or Five or Six months after hire	<p style="text-align: center;">Five or Six-Month Checkpoint</p> <ul style="list-style-type: none"> <li>• Complete Classified Employee Performance Evaluation</li> <li>• Recommend move to Regular Employee Status or termination of employment</li> </ul> <p style="text-align: center;"><i>Send copies to HR Department. Notify HR Department of any concerns regarding work performance.</i></p>
June 1st	<p style="text-align: center;">End of year of regular evaluation cycle</p> <ul style="list-style-type: none"> <li>• Complete Classified Employee Performance Evaluation</li> </ul> <p style="text-align: center;"><i>Send original signed copy to the HR Department</i></p>

## **REGULAR CLASSIFIED EMPLOYEE TIMELINE**

(does not include Probationary Employees)

Evaluation Cycle*	Regular Employee (after first year of employment)
August/September	Supervisors notify employees of the evaluation process, timeline, and expectations. Supervisor provides any special instruction for performance goals.
October	Employee completes the Goals Form using the SMART Goal Format by October 31st. Supervisor and employee meet to review goals.
January	<p style="text-align: center;">Mid-Year Review</p> <ul style="list-style-type: none"> <li>Supervisors meet with employees to review progress on goals.</li> <li>Adjust goals or plans if needed.</li> </ul>
June 1st	<p style="text-align: center;">End of year of regular evaluation cycle</p> <ul style="list-style-type: none"> <li>End of year Review Goal Setting Template</li> <li>Complete Classified Employee Performance Evaluation</li> </ul> <p style="text-align: center;"><i>Send original signed copy to the HR Department</i></p>

# **CLASSIFIED EMPLOYEE**

## **PROFESSIONAL GOAL SETTING TEMPLATE**

<b>Name</b>	Click or tap here to enter text.		
<b>Job Title</b>		<b>School Year:</b>	
<b>Supervisor</b>		<b>Date:</b>	Click or tap to enter a date.

<b>PGG Goal-Setting Conference</b>	<b>Professional Growth Goal:</b> (Set 1 SMART goals (Specific, Measurable, Achievable, Relevant, Time-Bound) related to your role, professional development, or contributions to the school/district.	Click or tap here to enter text.		
	<b>Strategies/Action Plan:</b> <ul style="list-style-type: none"> <li>How do I plan to achieve my Professional Growth Goal?</li> </ul>			
	<b>Resources and/or Support:</b> <ul style="list-style-type: none"> <li>What resources and support do I need to meet my Professional Growth Goal?</li> </ul>	Click or tap here to enter text.		
	<b>Employees Signature:</b>	<b>Date:</b>	<b>Superintendent/Supervising Administrator Signature:</b>	<b>Date:</b>



Mid-Year Review	<b>Collaborative Mid-Year Goal Review</b> <ul style="list-style-type: none"> <li>What progress has been made?</li> <li>Include a reflection on goals</li> <li>Cite supporting data/artifacts</li> </ul>			
	<b>Strategy Modification</b> <ul style="list-style-type: none"> <li>What adjustments need to be made to my strategies?</li> </ul>			
	Administrator's Signature:	Date:	Superintendent/Supervising Administrator Signature:	Date:

End of Year Review	<b>End-of-Cycle Data</b> <ul style="list-style-type: none"> <li>Goal Achievement</li> </ul>	Click or tap here to enter text.		
	<b>Reflection on Results</b> <ul style="list-style-type: none"> <li>Overall, what worked, or what should be refined?</li> </ul>	Click or tap here to enter text.		
	<b>Professional Growth Plan Implications</b> <ul style="list-style-type: none"> <li>How can I use these results to support my professional growth?</li> <li>Is this a goal that should be continued or refined again next year?</li> </ul>	Click or tap here to enter text.		
	Employees Signature:	Date:	Superintendent/Supervising Administrator Signature:	Date:

## South Umpqua School District Classified Employee Evaluation

<b>Name</b>	Click or tap here to enter text.		
<b>Job Title</b>		<b>School Year:</b>	
<b>Supervisor</b>		<b>Date:</b>	Click or tap to enter a date.

- 1. Attendance/Punctuality- Maintains appropriate attendance, avoids tardiness, and utilizes breaks/lunch per assigned schedule. Attends scheduled duties and meetings as assigned.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Absences and/or tardiness are frequent and interfere with job performance. Proper notification of absence or lateness is not given. Leave and reporting procedures are not followed.	Absence and/or tardiness may interfere with job performance. Occasionally absent or tardy without proper notification. Inconsistently complies with leave and reporting procedures.	Consistently observes working hours with minimum absences. Provides proper notification of absences. Appropriately and prudently uses leave, adhering to district leave policies.	Attends all scheduled workdays excluding emergency/business leave, professional development, and vacation. Leave and reporting procedures are followed.

**Comments:**

- 2. Quantity of Work - Produces the amount of work necessary to meet job requirements within the expected time span. Assesses what needs to be done to accomplish job responsibilities. Takes appropriate actions to complete assigned tasks.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Assigned tasks are rarely complete by expected deadlines. Appropriate priorities are not maintained. Structure and organization is lacking.	Occasionally completes tasks in timely and useful manner. May need support to prioritize and structure day.	Consistently completes assigned tasks in a thorough, orderly, and timely manner.	Anticipates work needs and completes work tasks, as deadlines require. Takes initiative to support/assist with tasks of others when time allows.

**Comments:**

**3. Quality of Work - Performs work assignments with accuracy, thoroughness, and neatness.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Routinely produces inaccurate, incomplete, and/or low-quality work. Work often needs to be redone/revised.	Inconsistently produces work that meets expectations for accuracy, thoroughness, and neatness. Work occasionally needs to be redone/revised.	Consistently completes work with accuracy, thoroughness, and neatness. Work seldom needs to be redone/revised.	Completes work with an exceptional degree of accuracy and detail. Work is exemplary and can be relied upon.

**Comments:**

**4. Job Knowledge - Demonstrates a thorough understanding of job duties and current procedures and practices. Uses and maintains equipment, technology, and supplies in a safe, proper and efficient manner.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Performance demonstrates misunderstanding of assigned work and the impact on other areas. Resources, equipment, and technology are not used or are used inappropriately for the position. Training is neglected and/or not applied.	Inconsistently exhibits understanding of assigned work and the impact on other areas. Occasionally uses resources, equipment, and technology for the position. Inconsistently attends trainings and/or inconsistently applies new learning.	Consistently exhibits clear understanding of assigned work and the impact on other areas. Regularly uses all resources, equipment, and technology for the position. Attends trainings; quickly learns new procedures and/or processes; and begins efficient application.	Serves as a reliable resource to others regarding work processes and procedures. Continuously strives to improve processes, procedures, and routines. Applies professional development that improves job knowledge and performance.

**Comments:**

**5. Policy, Regulations & Safety Practices - Knows and complies with applicable rules, regulations and board policies. Knows and follows applicable safety rules and guidance; promotes a safe school environment.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Many policies, procedures, and work rules are not followed. Reminders about safety practices and standards are frequently necessary.	Understands most policies, procedures, and work rules but does not follow them without input/direction. Inconsistently demonstrates good safety practices.	Understands and follows policies, procedures, and work rules. Routinely implements expected safety practices.	Actively inquires about, comprehends, and implements policies, procedures, and work rules. Supports others in implementing and following these policies, procedures and work rules.

**Comments:**

**6. Decision-making - Demonstrates ability to collaborate, problem-solve and base actions on fact rather than emotion.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
A lack of judgment under normal circumstances is frequently apparent. Reactive rather than responsive.	Is inconsistent in making sound decisions, anticipating needs, and using good judgment.	Makes sound decisions, anticipates needs, and uses good judgment.	Consistently makes sound decisions, anticipates needs, and uses good judgment under both normal and unusual circumstances.

**Comments:**

**7. Interpersonal Relations - Maintains cooperative, tactful and courteous relationships with students, coworkers, supervisors and the public.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Treatment of others lacks respect, fails to value diversity, and promotes rather than resolves conflict.	Inconsistently treats people with respect, does not always value diversity or resolve conflict professionally.	Consistently treats all people with respect, values diversity, and resolves conflict professionally.	Actively promotes respect, the value of diversity, and conflict resolution among all. Serves as a role model to others.

**Comments:**

**8. Adaptability/Flexibility - Demonstrates positive attitude when change occurs. Adapts and accepts feedback as it applies to the tasks at hand.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Changes in job duties meet with resistance; suggestions to implement changes in responsibilities, methods, and procedures are ignored. Flexibility is not demonstrated in response to special circumstances.	Does not always adapt to changes in job duties or accept suggestions to implement changes in responsibilities, methods, and procedures. Inconsistently demonstrates flexibility in order to accommodate special circumstances.	Readily adapts to changes in job duties. Accepts suggestions and takes steps to implement changes in responsibilities, methods, and procedures. Demonstrates flexibility in order to accommodate special circumstances.	Responds confidently to the demands of work when confronted with change, adversity and other challenges.

**Comments:**

**9. Communication - Uses appropriate and effective speaking, listening and/or writing skills (as appropriate to the position).**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Communications are ineffective, inappropriate, or inconsistent. Communications are rarely courteous, complete, timely, carefully constructed, and/or appropriate to the audience/context.	Inconsistently demonstrates effective written and/or verbal communication. Communications are inconsistently courteous, complete, timely, carefully constructed, and/or appropriate to the audience/context.	Demonstrates effective written and/or verbal communication. Communications are consistently courteous, complete, timely, carefully constructed, and appropriate to the audience/context.	Demonstrates excellent written and/or verbal communication. Communications are consistently courteous, complete, timely, carefully constructed, and appropriate to the audience/context even in the face of adversity.

**Comments:**

**10. Confidentiality - Reveals confidential information with discretion only to those individuals needing to know. This includes verbal and written communications regarding student, parent, and staff information.**

Does not meet	Progress toward meeting	Meets expectations	Exceeds expectations
Does not exercise discretion and/or safeguard confidential and privileged information.	Inconsistently exercises discretion; safeguards confidential and privileged information.	Consistently exercises discretion; safeguards confidential and privileged information.	Anticipates confidentiality concerns and actively works to safeguard confidential and privileged information.

**Comments:**

\_\_\_\_\_  
**Employee Signature \***      **Date**

\*Signature certifies that this report has been discussed with me. I understand my signature does not necessarily indicate agreement. Employee response or comment should be submitted within one week.

\_\_\_\_\_  
**Evaluator Signature**      **Date**

**Employee Comment (if desired – may use additional page):**