

XII.

OFFICE EMPLOYEE PERSONNEL
PERFORMANCE IMPROVEMENT
AND
CONFIDENTIAL EXEMPT PERSONNEL
REQUIRED EVALUATION

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**THE FOLLOWING PROCEDURES ARE SET FORTH IN THE CONTRACT BETWEEN
THE MIAMI-DADE COUNTY PUBLIC SCHOOLS AND THE UNITED TEACHERS OF
DADE**

**OFFICE EMPLOYEES
EVALUATION PROCEDURES**

Section 1. General Provisions

- A. All employees within the bargaining unit shall receive an annual evaluation each year by no later than **June 1** of the current fiscal year. An interim evaluation shall be made when the employee's performance is unsatisfactory, in accordance with the provision of this Article. Probationary and promoted employees whose performance is unsatisfactory shall be evaluated as provided in Sections 3 and 4 of this evaluation procedure.
- B. The professional judgment of the supervisor is the key element in determining an employee's job-related competencies and performance. The observations of the employee's acts--what is done, how it is done, timeframe in which it is done--are the basis for the evaluation.
- C. Employees shall be given a copy of the official evaluation form. The employee's signature means only that he/she has seen and received the document.
- D. An unsatisfactory evaluation may be used as evidence to support termination or other action adverse to the employee.
- E. Intercommunication systems, electronic or photographic devices may not be used as part of any evaluation unless by prior mutual agreement between the supervisor and the employee.
- F. Regular and promoted employees may use grievance procedures in disputes over compliance with evaluation procedures.

Section 2. Regular Employees

- A. From the beginning of the year, administrators should make every reasonable effort to assist unit members to perform their duties successfully. In those instances where an employee's performance is unsatisfactory, the administrator shall **notify** the employee **in writing** of the deficiencies and corrective action to be taken.
- B. By **mid-December**, employees whose performance has continued to be unsatisfactory, shall be evaluated by their immediate supervisor. An interim evaluation which results in an unsatisfactory rating must be followed by a conference-for-the-record with the employee to be held within **five** working days of receipt of the evaluation. At this conference, prescription(s) must be given for the deficient indicator(s). Such prescription(s) must be directly related to the deficiency(ies) and structured to include specific recommendations to be used in remediating the deficiency(ies). Timelines for the satisfactory completion of the prescription(s) must be appropriate to the nature of the prescription(s). Satisfactory completion of the prescription(s) shall be acknowledged in writing by the immediate supervisor.
- C. At least one additional interim evaluation shall be conducted subsequent to the December evaluation to address **continued** deficiencies or unsatisfactory performance. Additional evaluations may be made to continue monitoring the employee's performance.

- D. Subsequent to December, when an employee's performance is considered unsatisfactory, the provisions of paragraph B, Section 2 of this evaluation procedure shall apply.

Section 3. Probationary Employees

Probationary employees whose performance is unsatisfactory shall be evaluated during the probationary period. This interim evaluation shall be conducted as soon as concerns exist about the probationary employee's performance. A final evaluation shall be made during the probationary period if concerns continue to exist about the probationary employee's performance. If the probationary employee's performance is determined to be unsatisfactory, the probationary employee may be terminated without recourse in accordance with Article XVIII, Section 9 of the UTD contract.

Section 4. Promoted Employees

- A. Promoted employees shall be evaluated during the probationary period as soon as concerns exist about the promoted employee's performance. In such instances, pursuant to Article XVIII, Section 5 (F) of the UTD contract, the employee shall be advised of the concern, given suggestions for improvement, and allowed a reasonable amount of time for improvement to occur. In no case, however, shall such amount of time extend beyond the contractual probationary period. A final evaluation shall be made at the end of such amount of time. If the promoted employee's performance is determined to be unacceptable during the probationary period, the provisions of Article XVIII, Section 5 (F) of the UTD contract shall apply.
- B. When the promoted employee is returned to a position substantially equivalent to the one held prior to the promotion, the provisions of Section 2 of this evaluation procedure shall apply.

OVERALL PERFORMANCE RATING

DECISION RULE: Check overall performance rating **Satisfactory** if all categories are marked **Satisfactory**. Check overall performance rating **Unsatisfactory** if one or more categories are marked **Unsatisfactory**.

ANNUAL EVALUATION

DECISION RULE: Check each category **Satisfactory**, if there are no current deficiencies and if prescription given during the year, if any, has been satisfactorily completed.

COMMENT SECTION: Comments which adversely or negatively impact the employee must be based on **documentation** processed in accordance with contractual provisions.

**INTERPRETIVE GUIDE
EVALUATION OF OFFICE PERSONNEL**

CATEGORY A - KNOWLEDGE

<u>Indicators</u>	<u>Commentary</u>
1. Skillful use of equipment to do assigned job.	An employee is expected to be able to operate standard office equipment, e.g. typewriters, adding machines, duplicating machines, etc. This indicator refers to the mechanical skills needed to operate equipment.
2. Ability to communicate effectively.	An employee is expected to communicate in verbal or written form in an accurate and precise manner. Accuracy here refers to correctness of information disseminated and the use of accepted grammatical form.
3. Knowledge of office procedures.	This indicator measures the employee's knowledge of standard procedures, the relaying of messages, processing and distribution of forms.
4. Knowledge of technical/secretarial skills required for positions.	Does the employee use correct format for assigned tasks? Are messages taken correctly? <u>If</u> a skill is required for the position (i.e. shorthand), does the employee possess that skill?

DECISION RULE: Check **A** Satisfactory if all four indicators are marked satisfactory.

Note: UOPD is now part of UTD.

CATEGORY B - QUALITY OF WORK

<u>Indicators</u>	<u>Commentary</u>
1. Accuracy of completed task.	Are completed tasks and assignments essentially error-free?
2. Use of appropriate format(s) for tasks.	Are the tasks and assignments presented in an appropriate format?

DECISION RULE: Check **B** Satisfactory if both indicators are marked satisfactory.

CATEGORY C - EFFICIENCY

<u>Indicators</u>	<u>Commentary</u>
1. Timely completion of assignments.	Are assignments completed in a reasonable period of time? Are deadlines met?
2. Effective use of time.	Does the employee use his/her work time productively towards completion of tasks?
3. Acceptable quantity of work produced.	Does the employee accomplish most of what has been planned or assigned each day?
4. Ability to adapt to volume fluctuation/priorities.	This indicator measures the employee's ability to accommodate and adjust to changes in priorities and volume fluctuations due to emergencies, seasonal demands, and district requirements.

DECISION RULE: Check **C** Satisfactory if all four indicators are marked satisfactory.

CATEGORY D - INTERPERSONAL SKILLS

<u>Indicators</u>	<u>Commentary</u>
1. Positive relationship with public.	Because office personnel are often the first contact the public has with a school, it is important that a positive image be reflected in terms of courtesy and promptness in responding to them.
2. Harmonious relationship with staff.	Does the employee relate in a positive manner with co-workers, administration, and other employees?

DECISION RULE: Check **D** Satisfactory if both indicators are marked satisfactory.

CATEGORY E - DEPENDABILITY AND JUDGMENT

<u>Indicators</u>	<u>Commentary</u>
1. Follow-through on assignments.	Does the employee take the necessary steps in carrying out assigned duties and responsibilities and see to it that each task is completed?
2. Ability to work independently.	Can the employee work with minimal supervision?
3. Ability to make sound decisions.	This indicator measures the employee's ability to recognize priorities, use common sense, recognize emergencies, and take appropriate action.

DECISION RULE: Check **E** Satisfactory if all three indicators are marked satisfactory.

CATEGORY F - ATTENDANCE AND PUNCTUALITY

<u>Indicators</u>	<u>Commentary</u>
1. Regular attendance.	The employee's attendance is regular except when on authorized leave.
2. Adherence to work schedule (punctuality).	The employee is punctual, adheres to lunch/break time, and follows schedule of assigned duties, if any.

DECISION RULE: Check **F** Satisfactory if both indicators are marked satisfactory.

CATEGORY G - ADHERENCE TO RULES AND PROCEDURES

<u>Indicators</u>	<u>Commentary</u>
1. Adherence to School Board Rules	
2. Adherence to office procedures	

DECISION RULE: Check **G** Satisfactory if both indicators are marked satisfactory.



SCHOOL YEAR _____

EVALUATION OF OFFICE PERSONNEL

NAME (LAST)	(FIRST)	(M.I.)	WORK LOCATION & NUMBER
EMPLOYEE NUMBER	JOB TITLE		JOB CODE

EMPLOYEE STATUS: Regular Probationary EVALUATION: Interim Annual/Final
 DATE OF EVALUATION _____ EVALUATOR _____

ALL CATEGORIES MUST REFLECT A RATING. UNSATISFACTORY RATING REQUIRES AN EXPLANATION.

	Satisfactory	Unsatisfactory	Explanation (Use separate sheet if necessary)
A. KNOWLEDGE	<input type="checkbox"/>	<input type="checkbox"/>	
1. Skillful use of equipment necessary to do assigned job.	_____	_____	_____
2. Ability to communicate effectively.	_____	_____	_____
3. Knowledge of office procedures.	_____	_____	_____
4. Knowledge of technical/secretarial/clerical skills required for position.	_____	_____	_____
B. QUALITY OF WORK	<input type="checkbox"/>	<input type="checkbox"/>	
1. Accuracy of completed task.	_____	_____	_____
2. Use of appropriate format(s) for task(s).	_____	_____	_____
C. EFFICIENCY	<input type="checkbox"/>	<input type="checkbox"/>	
1. Timely completion of assignments.	_____	_____	_____
2. Effective use of time.	_____	_____	_____
3. Acceptable quantity of work produced.	_____	_____	_____
4. Ability to adapt to volume fluctuation/priorities.	_____	_____	_____
D. INTERPERSONAL SKILLS	<input type="checkbox"/>	<input type="checkbox"/>	
1. Positive relationship with public.	_____	_____	_____
2. Harmonious relationship with staff.	_____	_____	_____
E. DEPENDABILITY AND JUDGMENT	<input type="checkbox"/>	<input type="checkbox"/>	
1. Follow-through on assignments.	_____	_____	_____
2. Ability to work independently.	_____	_____	_____
3. Ability to make sound decisions.	_____	_____	_____
F. ATTENDANCE AND PUNCTUALITY	<input type="checkbox"/>	<input type="checkbox"/>	
1. Regular attendance.	_____	_____	_____
2. Adherence to work schedule.	_____	_____	_____
G. ADHERENCE TO RULES AND PROCEDURES	<input type="checkbox"/>	<input type="checkbox"/>	
1. Adherence to School Board rules.	_____	_____	_____
2. Adherence to office procedures.	_____	_____	_____

SAMPLE

OVERALL PERFORMANCE RATING: Interim Annual/Final

_____ Satisfactory (Comments): _____

_____ Unsatisfactory (Required actions toward remediation of deficiency): _____

Employee's Signature _____ (Date) _____

Evaluator's Signature _____ (Date) _____

878-2423 (Signature means only that the employee has seen and received the document.) FM-3882 Rev. (06-00)



OFFICE PERSONNEL

RECORD OF OBSERVED DEFICIENCIES/PRESCRIPTION

FOR PERFORMANCE IMPROVEMENT

Employee _____

*Signature _____

Date _____

Date of Evaluation(s) _____

Evaluator _____

Signature _____

Date _____

School/Department _____

Job Title _____

Employee Status _____

*Employee's signature means the employee has seen and received the document.

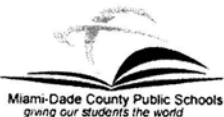


RECORD OF OBSERVED DEFICIENCIES/PRESCRIPTION FOR PERFORMANCE IMPROVEMENT (OFFICE PERSONNEL)

CATEGORY/ INDICATOR DEFICIENT	DEFICIENCY SUMMARY DESCRIPTION	EMPLOYEE EXPLANATION FOR DEFICIENCY(ies)	PRESCRIPTION PLAN ACTIVITIES	RESOURCES	TIMELINE

SAMPLE

XII-10



EXEMPT/CONFIDENTIAL PERSONNEL EVALUATION

20__ - 20__

NAME _____ EMPLOYEE NUMBER _____

WORK LOCATION NAME _____ WORK LOCATION NO. _____

1. QUALITY OF WORK

(Includes accuracy of completed tasks, achievement of objectives, effectiveness, responsibility and neatness of work product.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

2. WORK HABITS

(Includes satisfactory attendance, observance of work hours, adherence to School Board policies and guidelines.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

3. INTERPERSONAL SKILLS

(Includes participation and motivation of others, contribution to office department morale, maintenance of positive relations with the public and office staff.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

4. DECISION MAKING AND JUDGMENT

(Includes ability to make sound decisions, analyze/understand job complexities, respond in a timely and effective manner. Ability to work with minimal supervision.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

5. PLANNING AND ORGANIZATION

(Includes ability to plan and organize activities for effective utilization of personnel, equipment and material resources, clearly defines assignments and adheres to time-lines. Demonstrates initiative and resourcefulness in the discharge of responsibility.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

6. COMMUNICATION

(Includes ability to communicate effectively with various levels of administration, departments, public and private agencies, and parent and community groups. Ability to present ideas clearly.)

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

COMMENTS (Attach additional pages if necessary)

GUIDELINES FOR RATINGS

EXEMPLARY: Performance which consistently exceeds the job requirements and expectations of the position. Use of this rating requires documentation and examples describing exceptional performance. At least five categories must be rated Exemplary and none Below Expectations in order to receive an overall evaluation of Exemplary.

ABOVE EXPECTATIONS: Performance which is better than what is normally expected. The majority (4) of the categories must be rated as Above Expectations or Exemplary and none rated Below Expectations.

MEETS EXPECTATIONS: Performance is as required in an entirely satisfactory manner. All categories will be rated at least Meets Expectations and none rated Below Expectations.

BELOW EXPECTATIONS: Overall performance or specific aspects of performance is unacceptable. The rating of Below Expectations must be preceded by a formal conference for the record between the supervisor and the employee on or before December 31st. A written recommendation for remediation must be attached to the evaluation and given to the employee.

OVERALL EVALUATION RATING

EXEMPLARY ABOVE EXPECTATIONS MEETS EXPECTATIONS BELOW EXPECTATIONS

EVALUATOR'S SIGNATURE _____ (Date)

EMPLOYEE'S SIGNATURE _____ (Date)

(Signature means only that the employee has seen and received the document.)

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