

Clackamas Education Service District

Code: **GDN-AR**
Adopted: 8/21/96
Readopted: 05/20/09; 10/12/17
Orig. Code(s): 2370

Evaluation of Classified and Confidential Staff

1. Evaluation Procedure

a. Evaluation is a year-long process that includes the following basic components:

- (1) Review of the job assignment and job description;
- (2) Setting of goals (where appropriate) that;
 - (a) Are closely related to the work situation;
 - (b) Are identified through the evaluation process;
 - (c) Contribute to the needs of CESD; and
 - (d) Are related to the requirements of the individual's job description.
- (3) Observation of the employee in the worksite (where appropriate);
- (4) Observation by the supervisory staff;
- (5) Other data gathering, such as a review of work products;
- (6) Summary conference to review the Employee Evaluation Report; and
- (7) The Employee Evaluation Report shall be completed and on file in the human resource services office by June 30 of each year.

b. Documentation that will be produced during the process and included in the employee's personnel file will include:

- (1) The employee's set of goals for the year (where appropriate);
- (2) A written summary of formal observations (where appropriate);
- (3) The Employee Evaluation Report.

2. Probationary Employees

a. Probationary employees will be observed at least two (2) times during the probationary period. These shall include:

- (1) First observation – within 90 days of employment;
- (2) Second observation – in the sixth month; and
- (3) Summary conference – completed at the end of the probationary period.

b. In the event of emergency, school closure, illness, or other scheduling difficulties, the observation dates may be adjusted from those listed above

c. At any time during the probationary period, the supervisor may recommend termination if the performance of the new employee is not adequate

3. Regular Employees

All regular employees will be observed at least once each year.

4. Conferences and Observations

- a. Annually, there shall be a conference between the employee and the supervisor to review the employee's job assignment, job description, to establish any goals for the employee, and to inform the employee of the conditions, standards, and practices to be used in the evaluation program.
- b. Informal observations may occur at any time the supervisor is in the employee's work station.
- c. Formal observation(s) (if scheduled) shall take place at a time mutually agreed upon by the employee and the supervisor.
- d. At the summary conference, the employee and the supervisor shall review the employee's performance, related factors, and progress toward meeting any employee goals. The results of the evaluation activities will be recorded on the Employee Evaluation Form. The employee and the supervisor will sign the form indicating that the results have been discussed. A copy will be given to the employee. The employee may have a letter of explanation or rebuttal attached to the report. Upon request of an employee, the annual evaluation will be discussed in a conference with the supervisor and the supervisor's superior.

5. Plan of Assistance

- a. For employees beyond the probationary period, a plan of assistance may be developed if it has been determined that the employee's performance is in need of improvement.
- b. An employee shall be notified of a plan of assistance in writing.
- c. The plan shall include:
 - (1) An objective analysis of observable difficulties;
 - (2) A statement of immediate goals designed to overcome the difficulties and specific criteria measuring progress;
 - (3) Assistance to be provided;
 - (4) Monitoring and timelines for assessment.
- d. Observations may be requested by the employee or scheduled by the supervisor. A report may be written for each observation. Such observation reports shall be made part of the employee's permanent file.
- e. If the employee has demonstrated satisfactory compliance with stated criteria to meet the specific goals as outlined by the Plan of Assistance, the employee's status will return to normal. The final written summary of the Plan of Assistance shall include the supervisor's recommendations for the resolution of the Plan of Assistance status.
- f. If the employee has failed to make satisfactory improvement, the supervisor may:
 - (1) Extend the Plan of Assistance;
 - (2) Recommend termination.
- g. Whenever an employee is to be placed on a Plan of Assistance, copies of the initial notice and subsequent decisions regarding the employee shall be sent through the employee's supervisory chain of command and the human resource services office.