

Evaluation Process for Confidential Employees

A performance evaluation is exactly that. An evaluation of an employee's performance. It is neither an award nor is it discipline. It is, however, a "pat on the back" for work that is well done. It is also constructive feedback on areas that need adjustment. A performance evaluation is an opportunity to share a reasoned and well-thought out assessment of an employee's performance, including what is working well and where adjustments need to be made. It is also an opportunity to reflect on the prior year, and set goals for the coming year. While coaching and feedback are a part of the evaluation, they should also be happening on an ongoing basis, not just during a periodic evaluation.

PROBATIONARY

Timing: The probationary period for confidential employees is six months. During this period, they shall be evaluated at least twice before the end of first five months in the position. The probationary period is a period in which the District shall evaluate the employee's potential for permanency.

The probationary employee shall be evaluated within the last five (5) working days of their third and fifth month anniversaries. *(For example, the three-month anniversary for a probationary employee that started on January 15th is April 14th. The supervisor should provide the probationary employee their evaluation within five (5) working days either before or after the anniversary date.)*

An employee is "probationary" when they are new to both the position and the classification. *(For example, a newly hired Administrative Assistant IV is new to the position and new to the classification. If the incumbent transfers to another Administrative Assistant IV position supporting a different Vice President after serving in the position for two years, then they will be new to the position, but not new to the classification. In that case, they will not be probationary in the position. However, if they are promoted into the Executive Assistant to the President position, then they will be a probationary employee.)*

Evaluation: Each written performance evaluation report must indicate that the probationary employee "meets expectations" in order them to successfully complete the probationary period and to achieve permanency in the position.

In addition to the evaluations, supervisors are responsible for providing employees with other timely and constructive feedback, coaching, training and other support to help the employee be knowledgeable and successful in the position.

Need for Improvement: Any evaluation containing one or more needs improvement and/or unsatisfactory ratings shall include a **Performance Improvement Plan (PIP)**. Notification to an employee of a need for improvement in an area should not be a surprise during an evaluation meeting. Need for improvement should be communicated and documented over the course of the evaluation period. The **PIP** should include specific guidance/examples of what improved performance looks like in the deficient area(s). Any **PIP** should be shared with the Chief Human Resources Officer prior to being provided to the employee so that the CHRO can provide additional feedback and perspective.

Release from Probation: In severe circumstances, the employee may be released from probation and separated from employment without the opportunity to work under an **PIP**. Any such circumstances should be first discussed with the Chief Human Resources Officer. In cases where an employee is being released from probation, the required performance evaluation(s) still must be completed and filed with Human Resources.

REGULAR, NON-PROBATIONARY

Timing: Regular confidential employees shall be evaluated in writing annually during the anniversary month in which they originally assumed the position. The evaluation shall be completed no later than the last working day of that month. *(For example, if a confidential employee was hired on August 15th, they must be evaluated no later than August 31st of the following year with an annual evaluation.)*

Managers may only evaluate employees for the time period in which they actually supervised the employee. In such cases where the supervisor moved into their position during the employee's evaluation year, their evaluation should begin at the time they began supervising the employee. For example, if an employee's evaluation year ends in September, but the new supervisor assumed their role in February, the first annual evaluation from the new supervisor would be for the period from February through September.

Additional evaluation reports may be made at other than the specified times when such are deemed necessary by the supervisor or designated manager.

Whenever possible, supervisors who are vacating their positions should do an evaluation of all confidential staff that report to them if it has been 5 or more months since the last evaluation.

Evaluation: Provide details on reasons the employee met expectations, exceeded expectations, needs improvement, or was unsatisfactory in their performance. Additional supporting documents may be attached to the evaluation form to support the evaluation narratives. If more space is needed, please attach a separate sheet of paper with the additional narrative.

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