

## Article 7 – Performance Review

### 7.1 Goal

The basic goal of the employee evaluation process is to help each employee perform his/her present job more effectively to the mutual benefit of the individual and the District.

### 7.2 Objectives

- 7.2.1 To provide a means of evaluating each employee's performance in the specific context of his/her job.
- 7.2.2 To determine individual needs for improvement and development.
- 7.2.3 To secure continuing communication of individual development.
- 7.2.4 To provide an opportunity to recognize and document outstanding service as well as service that has been unsatisfactory to the District.

### 7.3 Frequency of Evaluation

- 7.3.1 Probationary employees shall be evaluated at least twice during their probationary period, normally during the second and fifth months.
- 7.3.2 Permanent employees shall be evaluated at least annually.
- 7.3.3 Twelve-month employees shall normally be evaluated on or about their anniversary date of hire.

### 7.4 Procedure

- 7.4.1 Performance review forms shall be mutually agreed upon. The evaluation form with instructions shall be attached as Appendix B.
- 7.4.2 An employee shall be evaluated by the first level of management above the employee or by an administrator who has the responsibility to direct the work activity of the evaluated employee.
- 7.4.3 It will be necessary in some cases for management to consult with the employee's immediate supervisor in order to make a comprehensive evaluation.
- 7.4.4 Evaluation will be based primarily on observation of the employee in the performance of his/her duties. Comments based on secondary information shall have supportive documentation identifying the source and circumstances and be given limited weight.
- 7.4.5 An employee will be informed in advance of a meeting with management to discuss the employee's evaluation. An employee shall have the right to have a Union representative present at such a meeting, which shall be rescheduled within ten (10) working days, if necessary, to accommodate this right.
- 7.4.6 The employee shall be informed of his/her right to prepare and have attached to the evaluation form any written comments which the employee wishes to make.
- 7.4.7 Any evaluation which reflects a needs improvement or unsatisfactory rating shall be accompanied by a written explanation by the Evaluator and a remediation plan. The employee shall have the right to review and respond, orally and/or in writing to an unsatisfactory evaluation pursuant to the provisions of Article 6 of the Agreement.
- 7.4.8 The employee's signing of an evaluation form does not mean that the employee agrees with the evaluation but it does mean that the employee has had an opportunity to discuss the evaluation with his/her evaluator. The forms shall have a box on them where the employee will be given the opportunity to check agreement or disagreement with the evaluation.
- 7.4.9 The employees will be given a copy of his/her completed evaluation form at the time of signing.
- 7.4.10 Performance review shall be based on direct observation of the supervisor and/or on reliable documented information which has been verified by the supervisor. Any negative performance review shall contain specific recommendations for improvement. The employee shall have the right to review and respond to any negative performance review. Performance reviews shall be given once annually.
- 7.4.11 Performance review forms shall be mutually agreed upon. See Appendix B.

### 7.5 Miscellaneous Provisions

- 7.5.1 Only evaluation procedures as set forth above are subject to the grievance mechanism.
- 7.5.2 In those cases where an employee believes that his/her evaluation contains a blatant inaccuracy or is of a vindictive nature, the employee shall have a right to seek administrative review within fifteen (15) working days, excluding vacation and holidays during which the employee is not scheduled to work, of receipt of the evaluation. Said review shall first be made by the Director of Classified Personnel. If the employee is not satisfied with that review, one shall be made by the Superintendent. Either the Director of Classified Personnel or the Superintendent can overturn an evaluation and direct that a new one be made.

*The Parties agree to the Performance Review, Remediation & Instructions Forms attached herein.*

BERKELEY UNIFIED SCHOOL DISTRICT  
PERFORMANCE REMEDIATION PLAN FOR CLASSIFIED PERSONNEL

INSTRUCTIONS: A remediation plan must be developed by the immediate supervisor and the employee any time a performance area is given a rating of "Needs Improvement" or "Unsatisfactory." The plan should contain specific objectives, as well as timelines, to monitor and track the employee's progress toward satisfactory performance. The plan must be reduced to writing on this form and must be signed by both the employee and the supervisor. If more than three Performance Areas need to be addressed, or if more Objectives are necessary, an additional form should be used. The completed form(s) must be submitted to Human Resources with the Performance Review.

PERFORMANCE AREA: \_\_\_\_\_ RATING RECEIVED \_\_\_\_\_

OBJECTIVE: \_\_\_\_\_

ACTION PLAN AND TIMELINE: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PERFORMANCE AREA: \_\_\_\_\_ RATING RECEIVED \_\_\_\_\_

OBJECTIVE: \_\_\_\_\_

ACTION PLAN AND TIMELINE: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

PERFORMANCE AREA: \_\_\_\_\_ RATING RECEIVED \_\_\_\_\_

OBJECTIVE: \_\_\_\_\_

ACTION PLAN AND TIMELINE: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

SUPERVISOR'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

The employee is required to sign this remediation plan assessment indicating that it has been seen and discussed. Signature does not imply agreement.

\_\_\_\_\_ I agree with this plan.      \_\_\_\_\_ I disagree with this plan.

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

**BERKELEY UNIFIED SCHOOL DISTRICT  
PERFORMANCE REVIEW FOR CLASSIFIED PERSONNEL**

EMPLOYEE NAME \_\_\_\_\_ CLASSIFICATION \_\_\_\_\_  
 SITE DEPARTMENT \_\_\_\_\_ ANNIVERSARY DATE \_\_\_\_\_  
 IMMEDIATE SUPERVISOR \_\_\_\_\_ RETURN TO HUMAN RESOURCES BY \_\_\_\_\_

**INSTRUCTIONS:** The immediate supervisor must rate the employee's performance in each area. Any rating other than "Satisfactory" MUST be substantiated by specific performance examples which explain the rating. Use additional sheets as necessary. A rating of "Needs Improvement" or "Unsatisfactory" requires that a remediation plan be developed (using the BUSD Remediation Plan form) and attached to this appraisal. Definitions and additional instructions are on the back of this form.

WORK KNOWLEDGE: Commendable \_\_\_\_\_ Satisfactory \_\_\_\_\_  
 Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

Comments or examples: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

WORK QUALITY: Commendable \_\_\_\_\_ Satisfactory \_\_\_\_\_  
 Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

Comments or examples: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

WORK QUANTITY: Commendable \_\_\_\_\_ Satisfactory \_\_\_\_\_  
 Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

Comments or examples: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

BEING ON THE JOB: Commendable \_\_\_\_\_ Satisfactory \_\_\_\_\_  
 Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

Comments or examples: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

COOPERATION WITH OTHERS: Commendable \_\_\_\_\_  
 Satisfactory \_\_\_\_\_ Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

Comments or examples: \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SUMMARY COMMENTS \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

SIGNATURE OF IMMEDIATE SUPERVISOR: \_\_\_\_\_ DATE: \_\_\_\_\_

SIGNATURE OF NEXT LEVEL MANAGER: \_\_\_\_\_ DATE: \_\_\_\_\_

DISCUSSED WITH EMPLOYEE ON: \_\_\_\_\_ BY: \_\_\_\_\_

The employee is required to sign this performance review indicating that it has been seen and discussed. Signature does not imply agreement. The employee may appeal the performance review in accordance with the collective bargaining agreement, applicable laws, and the Rules and Regulations of the Personnel Commission of the Merit System.

\_\_\_\_\_ I agree with this review.

\_\_\_\_\_ I disagree with this review.

EMPLOYEE SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

## INSTRUCTIONS

The Performance Review form should be completed by the immediate supervisor, based on the employee's performance during the rating period. Once complete, the form should be submitted to the next level manager for approval.

The employee should be advised about one week in advance of the scheduled date for the review. The immediate supervisor should meet with the employee and discuss each performance area and rating.

If any performance areas are rated less than satisfactory, a remediation plan must be developed. The plan must be reduced to writing on the remediation plan form. Directions for remediation plans are on the remediation plan form.

The employee is required to sign the review form and the remediation plan, if applicable, and indicate whether s/he agrees with the review and plan. The employee has ten days to submit an appeal or additional written comments. Such comments should be directed to the Human Resources Office to be included in the employee's file, along with the review. The employee shall have the right to review and respond pursuant to the provisions of Article 6 of the Agreement.

Once signed, the employee receives a copy, the immediate supervisor may retain a copy, and the original is forwarded to Human Resources for inclusion in the employee's file. If a remediation plan has been developed, the original will go to Human Resources and the immediate supervisor and the employee each should receive a copy. The review and any remediation plan should be forwarded to Human Resources immediately. Human Resources will hold the forms for ten days from the date of the review discussion pending receipt of any employee comments.

## DEFINITIONS

**APPROVALS:** Two levels of management must approve the review before it is presented to the employee. Usually, this will be the immediate supervisor and the next level manager.

### PERFORMANCE AREAS:

*Work Knowledge:* Extent of information and understanding of the class and position. Ability and willingness to learn new methods. Knowledge of the techniques required by occupational class. Degree of direction required.

*Work Quality* Initiative, thoroughness, accuracy, neatness, extent to which actions are based on sound reasoning appropriate to circumstances as required by occupational class. Compliance with District, site or department administrative policies/procedures.

*Work Quantity:* Degree to which normal workload for occupational class and position is accomplished. Speed, volume, timeliness and consistency.

*Being on the Job:* Regular attendance. Timely arrivals and departures. Attention to tasks. Dependable time habits. Promptness in reporting unavoidable absences with valid and acceptable reasons.

*Cooperation:* Attitude toward job. Response to emergencies. Willing to assist and coordinate with co-workers. Ability to work harmoniously with co-workers and others as required by occupational class and position.

### PERFORMANCE RATINGS:

*Commendable:* Exceeds prescribed standards of performance consistently.

*Satisfactory:* Competent performance. Regularly meets the basic standards of the class and position.

*Needs Improvement:* Meets some standards, but falls below expectations in others. A remediation plan must be established for any areas where this rating is given.

*Unsatisfactory:* Performance is consistently below required standard in area related. A remediation plan must be developed for any areas where this rating is given.