

**ARTICLE 13: PERFORMANCE EVALUATION PROCEDURES**

13.1 **PERFORMANCE EVALUATION.** The purpose of an evaluation shall be to provide constructive feedback that will assist unit members with continuous improvement of performance in line with DISTRICT expectations and performance standards. ~~The term “evaluation” as used in Sections 13.2 through 13.8 of this Article means a formal written evaluation on the appropriate form prescribed by the DISTRICT (Appendix D).~~

13.1.1 **Performance Evaluation Form.** The performance evaluation shall be submitted by using the “Employee Performance Evaluation” form (accessible via the District intranet) and for reference purposes, a copy of the Employee Performance Evaluation form is located in Appendix **(insert)**.

13.1.2 **Performance Evaluation Evaluator.** The evaluator shall be the unit member’s immediate supervisor unless otherwise designated by the DISTRICT; ~~h~~However, the evaluator shall only be a person of management at the San Bernardino Community College District management.

~~13.2 The DISTRICT shall evaluate all unit members on permanent status once every two (2) years during the month of April, except in emergency circumstances. The annual evaluation for unit members obtaining permanent status prior to January 1<sup>st</sup>, will be conducted in the current school year. The annual evaluation for unit members obtaining permanent status subsequent to January 1<sup>st</sup>, will be conducted in the following school year. (moved to 13.2)~~

**13.2 PERFORMANCE EVALUATION - FREQUENCY**

13.2.1 **Probationary Unit Members.** The DISTRICT shall evaluate probationary unit members ~~on probationary status shall be evaluated by the completion of their second (2<sup>nd</sup>) month and immediately prior to the completion of their fourth (4<sup>th</sup>) month of probationary service. no less than two (2) times during the probationary period on or about the second (2<sup>nd</sup>) and the fourth (4<sup>th</sup>) month from the initial date of hire. The probationary period for unit members shall be six (6) months from the date of hire or appointment to a new classification. Probationary shall be required to serve in a probationary status for six (6) months from the date appointed to the position classification.~~

13.2.2 **Permanent Unit Members.** The DISTRICT shall evaluate permanent unit members ~~all unit members on permanent status once every year every (two (2) years) during their anniversary month (for purposes of this Article, “anniversary month” shall mean the month the unit member started in their current classification) the month of April, except in emergency circumstances as defined in Article 2: Management Rights or when the unit member is on leave.~~

13.3 The DISTRICT retains its prerogative to make additional evaluations as it deems necessary.

~~13.4 The evaluator shall be the unit member’s immediate supervisor unless otherwise designated by the DISTRICT. However, the evaluator shall only San Bernardino Community College District management. (moved to 13.1.2)~~

13.3 **PERFORMANCE EVALUATION – TIMELINE AND COMPONENTS.** The comprehensive performance evaluation for unit members shall be comprised of the following two (2) distinct components:

- a. **Unit Member Self-Assessment.** As part of the performance evaluation process, each unit member may complete the self-assessment portion of the “Employee Performance Evaluation” form (accessible via the District intranet) during the month prior to their anniversary month and shall be given a reasonable amount of paid time to complete it. The self-evaluation shall be shared with the evaluator and will become part of the evaluation report.
- b. **Evaluator’s Evaluation.** As part of the performance evaluation process, the evaluator shall prepare the unit member’s performance evaluation by completing the “Employee Performance Evaluation” form (accessible via the District intranet). In the event, the overall performance evaluation rating is “Performance Needs Improvement” or “Unsatisfactory Performance” the evaluator, in consultation with the Office of Human Resources shall develop a written Performance Improvement Plan (PIP).

**13.4 PERFORMANCE EVALUATION – CONFERENCE.** The evaluator shall meet with the unit member and shall discuss and review the performance evaluation form.

In the event, the overall performance evaluation rating is “Performance Needs Improvement” or “Unsatisfactory Performance” the evaluator, in consultation with the Office of Human Resources shall develop a written Performance Improvement Plan (PIP). The written PIP shall include an explanation of the reason(s) for such deficiencies specified in the “Employee Performance Evaluation” form and assist the unit member in making improvements. Expectations shall be outlined and discussed with the unit member to give an opportunity for improvement. ~~The immediate supervisor shall identify improvements needed and how the unit member may improve their performance. The immediate supervisor shall provide a written development plan including coaching and training, as needed, to address the identified deficiencies specified in Appendix D (Employee Performance Report).~~ The unit member’s performance must be reviewed within ~~sixty (60) ninety (90)~~ days to document the unit member’s progress, including any recommendations for continued success. (moved to 13.6) This PIP shall also constitute a performance improvement conference in accordance with Article 17: Progressive Discipline, section 17.3.1.

**13.5 PERFORMANCE EVALUATION – EMPLOYEE ACKNOWLEDGMENT AND RESPONSE.** A unit member may acknowledge that they have received the performance evaluation by electronically signing and dating the evaluation; however, the unit member’s electronic signature does not reflect either agreement or disagreement with the performance evaluation. In the event, that the unit member does not electronically sign the performance evaluation, the evaluator shall state on the performance evaluation form that the unit member refused to sign and shall identify the date on which they discussed and reviewed the performance evaluation with the unit member.

A unit member may be provided thirty (30) calendar days to provide a written response and/or documentation to the performance evaluation. A unit member’s written response and/or documentation shall be filed in accordance with the District’s online performance evaluation system and shall become part of the unit member’s personnel file.

~~13.5 The evaluation shall be signed by the evaluator and the unit member being evaluated. The unit member’s signature signifies only that the unit member has read the document, has been given a copy, and has been given the opportunity of attaching a written response which shall become part of the permanent record. Unit members have thirty (30) calendar days to file a written response to their evaluation with the Office of Human Resources.~~

~~13.6 No evaluation of a unit member shall be placed in the unit member’s personnel file without an opportunity for discussion between the unit member and the evaluator. A negative evaluation rating of 1 or 2 shall include an Employee Development Plan. The immediate supervisor shall identify improvements needed and how the unit member may improve their performance. The immediate supervisor shall provide a written development plan including coaching and training, as needed, to address the identified deficiencies specified in Appendix D (Employee Performance Report). The unit member’s performance must be reviewed within ninety (90) days to document the unit member’s progress, including any recommendations for continued success.~~

~~13.7 The DISTRICT retains its prerogative to make additional evaluations as it deems necessary.~~

(moved to 13.3)

- 13.8 The substance of any evaluation, including the observations, opinions, and conclusions of the evaluator, shall not be subject to the grievance procedure. The evaluation procedure as provided hereinabove shall be grievable.
- ~~13.9 An official file of evaluation reports shall be maintained in the DISTRICT's Office of Human Resources. The unit member shall have the right to review any evaluation during working hours. Evaluation reports shall not be used in disciplinary action against a unit member if the evaluation report was dated two (2) years preceding the aforementioned disciplinary action or was dated during a permanent unit member's probationary period.~~



### Test eforms Employee

Employee Performance Evaluation (from 03 / 2023 to 03 / 2024 )  
Due Date: Tue, Mar 12, 2024

#### General Information

<b>Position</b> Professional Expert	<b>Division</b>	<b>Evaluation Type</b> Probation
<b>Department</b> Human Resources	<b>Class Spec</b> Classified Hourly	

#### Ratings Summary :

Total Score

Overall Rating

Rater	Type	Total Score	Overall Rating	Weight
<b>Test eforms Employee</b>	Self Rater			0 %
<b>Melanie Gonzales</b>	Rater			100 %

#### Content

Narrative Section | Text Only

#### Employee Self-Assessment

##### Accomplishments (NEW)

Major accomplishments for this review period (e.g., assignments completed, reports, presentations, recognitions and awards, or other significant and/or high-quality results and achievements).

Rater	Comment
Test eforms Employee	
Melanie Gonzales	

##### Challenges (NEW)

Describe barriers or constraints that influenced your performance during the review period, if applicable.

Rater	Comment
Test eforms Employee	
Melanie Gonzales	

**Challenges (NEW)**

Describe barriers or constraints that influenced your performance during the review period, if applicable.

Rater	Comment
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Test eforms Employee

Melanie Gonzales

**Challenges (NEW)**

Describe barriers or constraints that influenced your performance during the review period, if applicable.

Rater	Comment
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Test eforms Employee

Melanie Gonzales

**Commitment to Diversity, Equity, & Inclusion (NEW)**

Describe considerations and actions you have taken to demonstrate your commitment to a diverse, equitable, and inclusive workplace.

- › Chooses appropriate tools or technology for tasks.
- › Understands and complies with position procedures and District policies; and with external regulations, if any.
- › Remains current on new developments in area of responsibility.
- › Uses knowledge and skills to assist others and shares knowledge to improve team performance.

Rater & Rating

Comment

Melanie Gonzales

Item Weight 14.28 %

### **Commitment to Quality and Quantity of Work (NEW)**

The manner in which the employee drives quality and quantity of service in the employee's approach to work and completion of job assignments, including accuracy, innovation, effective use of resources, productivity and accountability.

Core Behavioral Anchors:

- › Effectively applies time and resource management, priority setting and organizational skills to produce appreciable quantities of quality work.
- › Identifies and adopts innovative methods to improve the quality and quantity of work.
- › Demonstrates accountability and results in successfully meeting productivity and quality goals.
- › Actively seeks to leverage resources to promote improved quality and optimal productivity.
- › Assesses and recommends improvements to work practices and systems to improve quantity and quality of service or products delivered.

Rater & Rating

Comment

Melanie Gonzales

Core Behavioral Anchors:

- › Meets needs and expectations of customers.
- › Solicits and acts on feedback and explores creative approaches to enhance service and increase efficiency.
- › Solves problems at first point of contact whenever possible; if unable to do so, escalates to an appropriate resource.
- › Responds to requests in a timely manner.
- › Establishes and maintains effective customer relations with customers (students, colleagues, community, etc.).

Rater & Rating

Comment

Melanie Gonzales

Item Weight 14.29 %

**Collaboration/Teamwork (NEW)**

The effectiveness with which the employee works with others to achieve individual and departmental goals.

Core Behavioral Anchors:

- › Builds productive working relationships by effectively partnering with team members and others at work.
- › Works collaboratively with team members and is open to communication in both directions.
- › Seeks to understand the views of coworkers and other team members.
- › Balances individual and departmental goals.
- › Shares information and knowledge with others, as appropriate.

Rater & Rating

Comment

Melanie Gonzales

Core Behavioral Anchors:

- › Skillfully performs job duties within an increasingly diverse campus environment.
- › Treats all others with courtesy, respect and dignity.
- › Includes and welcomes all others.
- › Encourages the expression of different points of view.

**District-Wide Performance Standards**

Item Weight 100 %

**District-Wide Performance & Conduct Standards (NEW)**

The SBCCD Performance & Conduct Standards include: AP3050 Institutional Code of Ethics, AP3430 Prohibition of

### Compliance with Mandatory Training (NEW)

To be eligible for an overall rating of Meets Performance Expectations or above, the employee must be current with all mandatory training. To validate your employee's compliance, please check the NeoEd Learn module for online training records. If necessary, provide the employee with a reasonable deadline to complete outstanding training.

Rater & Rating	Comment
Melanie Gonzales	

Competency Section | Text Only

### Attendance

#### Absences (NEW)

Please indicate the number of absences for this performance evaluation period; this does not include any absences covered under an approved leave (e.g., authorized by the immediate supervisor/District or protected by federal/state leaves).

Rater	Comment
Test eforms Employee	
Melanie Gonzales	

#### Tardiness (NEW)

Please indicate the number of tardies for this performance evaluation period; this does not include any tardies covered under an approved leave (e.g., authorized by the immediate supervisor/District or protected by federal/state leaves).

Rater	Comment
Test eforms Employee	
Melanie Gonzales	

Evaluation Overall Section | 5-Point Factor Scale (NEW)

### Overall Rating

Assess the employee's overall performance based on demonstrated performance as provided by the comments and factor rating in the performance factors and on goal achievement. Preponderance of ratings for performance factors generally determines overall rating, but, employees who are rated as "Unsatisfactory" ("1" rating), in any performance factor, should be given an overall rating of no greater than "Needs Improvement" ("2" rating).

### Rating Scales

#### 5-Point Factor Scale (NEW)



**5-Point Rating Scale (NEWNEW)**

**5** Exceptional Performance

Performance far exceeded expectations due to exceptionally high quality of work performed in all essential areas of responsibility, resulting in an overall quality of work that was superior; and either 1) included the completion of a major goal or project, or 2) made an exceptional or unique contribution in support of department, college, or District objectives. This rating is achievable by any employee though given infrequently.

**4** Exceeds Performance Expectations

Performance consistently exceeded expectations in all essential areas of responsibility, and the quality of work overall was excellent.

**3** Meets Performance Expectations

Performance consistently met expectations in all essential areas of responsibility, at times possibly exceeding expectations, and the quality of work overall was very good.

**2** Performance Needs Improvement

Performance did not consistently meet expectations – performance failed to meet expectations in one or more essential areas of responsibility. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.

**1** Unsatisfactory Performance

Performance was consistently below expectations in most essential areas of responsibility. Significant improvement is needed in one or more important areas. A Performance Improvement Plan (PIP) to improve performance must be outlined in this evaluation report, including timelines, and monitored to measure progress.

**Yes / No Conduct Rating Scale**

**1** Yes, satisfactory performance/conduct has been demonstrated in all SBCCD District-wide performance & conduct standards

**0** No, satisfactory performance/conduct has not been demonstrated in all SBCCD District-wide performance & conduct standards

1

**Test eforms Employee**

2

Rater  
**Melanie Gonzales**

3

Approval  
**HR Review**

4

Approval & Signature  
**Melanie Gonzales** x

5

Signature  
**Test eforms Employee** x

6

Signature  
**Test eforms Employee** x