

LANE COMMUNITY COLLEGE CLASSIFIED STAFF PERFORMANCE EVALUATION

This form is used for annual evaluations (Spring of each year), or to end probationary periods of new employees

Purpose

- Demonstrate Lane's commitment to organizational excellence
- Provide an instrument to promote regularly scheduled, formal performance review for optimal professional development of all employees at Lane
- Strengthen communication
- Ensure goals and performance expectations are commonly understood
- Acknowledge performance achieved
- Create plans for performance adjustment where appropriate
- Align performance with Lane Vision, Mission, Core Values and Strategic Direction

General Evaluation Factors

- | | | | |
|--------------------|---------------------|---------------------|--------------|
| 1. Quality of work | 2. Quantity of work | 3. Knowledge of job | 4. Attitude |
| 5. Initiative | 6. Cooperation | 7. Attendance | 8. Diversity |

Performance Rating Scale

The following 5-point rating scale is used in reviewing performance. Please write any comments next to each factor.

- 1 = Does not meet expectations
- 2 = Partially meets expectations
- 3 = Meets expectations
- 4 = Exceeds expectations
- 5 = Significantly exceeds expectations

Process

- Step 1: Classified employee and manager will each fill out the **review instrument** using data gathered from a variety of sources (i.e. Correspondence, documentation about performance such as kudos or complaints), and in alignment to the essential functions of the Job description and job classification, Professional Development Action Plan for that year, and Division/Department Specific Factors.
- Step 2: Manager and classified employee MUST meet to go over the review together:
- a) Review that the Job Description is consistent with employee's job classification, sign and get employee's initials.
 - b) Discuss each evaluation factor and come up with final draft.
 - c) Manager will put together final review, and classified employee signs the review, employee may submit a rebuttal in writing for inclusion in their personnel file.
 - d) Manager sends signed original to Human Resources and give a copy to employee.
- Step 3: If deficient performance issues were identified an **Action Plan to Improve Deficient Performance** (See Appendix A) will be created. This plan should include a strategy and action steps for remediation, time-lines and a follow-up date for review.
- Step 4: Schedule a meeting within a month following review meeting to create a **Professional Development Action Plan** (See Appendix B) in collaboration between manager and classified employee. For this meeting the classified employee should bring their Professional Development Action Plan, identifying up to four proposed professional development objectives that meet their interests and enhance strengths and areas of weakness.
- Step 5: Ideally, classified employee and manager should meet to review progress on the Professional Development Plan twice during the fiscal year.

Section 1: Summary Page

_____ FISCAL YEAR

Employee Name: _____ Department: _____

L# : _____ Job Title: _____

TYPE OF EVALUATION	<input type="checkbox"/> Annual	OUTCOME: <input type="checkbox"/> Action Plan to Improve Deficient Performance: _____ <div style="text-align: right;">Due date</div> <input type="checkbox"/> Professional Development Action Plan: _____ <div style="text-align: right;">Due date</div>
	<input type="checkbox"/> Trial Service	OUTCOME: <input type="checkbox"/> Grant regular status <input type="checkbox"/> Terminate employment

Job classification has been reviewed. Both employee and manager agree the job description and job classification accurately describe the duties required of the employee.

 Manager's Initials Date Employee's Initials Date

Average Rating per Factor: (Bring average ratings from Sections 2 and 3 by Evaluating Factors)

1. Quality of work		6. Cooperation	
2. Quantity of work		7. Attendance	
3. Knowledge of job		8. Diversity	
4. Attitude		Division/Department factors	
5. Initiative		Overall Rating is:	

Your signature does not imply that you are in agreement with any or all of the evaluation remarks, only that you have been given an opportunity to participate in the process and have seen this review

General comments: (Please feel free to use additional pages for comments if needed)

 Supervisor's Signature Date Employee's Signature Date

Section 2a: General Evaluation Factors and Behaviors

Evaluation Factors	Behaviors	Rating 1 = Does not meet expectations 2 = Partially meets expectations 3 = Meets expectations 4 = Exceeds expectations 5 = Significantly exceeds expectations
1. Quality of Work Quality of work is demonstrated in understanding expectations, task completion, teamwork and collaboration, and customer service, consistent with the classification description.	a. Asks questions, where needed, when work is assigned to assure understanding of expectations. b. Presents error-free work c. Thinks independently to anticipate needs d. Meets customers needs professionally e. Collaboration is practiced. Average rating:	
Comments:		
2. Quantity of Work Quantity of work is demonstrated by meeting expectations for productivity in meeting Division/Department goals, consistent with the classification description.	a. Ability to multi-task b. Adapts to changing needs c. Ability to manage multiple priorities d. Practices clear and open communication with manager and co-workers about work load Average rating:	
Comments:		
3. Knowledge of Job Knowledge of job is demonstrated through decisions that result in optimal use of resources, consistent with the classification description.	a. Performs tasks with efficiency. b. Demonstrates confidence and confidentiality in making decisions related to work assignments. c. Knowledgeable of resources available to complete tasks. d. Knowledgeable of terminology associated with employee's field. e. Knowledgeable of effective and approved practices. f. Participates in learning experiences to stay current in their field. Average rating:	
Comments:		
4. Attitude An effective attitude is demonstrated by open thinking with the intent of building understanding and partnerships, consistent with the classification description.	a. Explores differences to build understanding. b. Engages in respectful dialogue, even on tough issues. c. Takes steps to build trust d. Demonstrates assertiveness with a solution-based approach e. Builds partnerships through supportive, direct communication Average rating:	
Comments:		

Evaluation Factors	Behaviors	Rating 1 = Does not meet expectations 2 = Partially meets expectations 3 = Meets expectations 4 = Exceeds expectations 5 = Significantly exceeds expectations
5. Initiative Initiative is demonstrated with an eye toward what needs to be done and a willingness to participate fully, consistent with the job classification description.	a. Works independently to meet identified and/or agreed upon outcomes	
	b. Thinks proactively about processes with an eye toward improvements that will optimize resources and meet Lane Strategic Directions	
	c. Seeks to understand the inter-relatedness of projects	
	d. Proactively seeks opportunities to enhance knowledge and skills for increased effectiveness	
	e. Builds partnerships of understanding across departments to compliment work efforts	
	f. Consistently demonstrates safe work practices	
	Average rating:	
Comments:		
6. Cooperation Working with others, with, the intent of mutual benefit and excellence in product/service.	a. Looks for partnership opportunities	
	b. Shares information, proactively	
	c. Integrates competing needs of self and others	
	d. Communicates priorities, proactively	
	e. Demonstrates flexibility in negotiating change to existing priorities and timelines	
	Average rating:	
Comments:		
7. Attendance Demonstrates reliability, consideration, information sharing in meeting agreed upon and contractual attendance standards.	a. Gives adequate notice of leave requests	
	b. Considers impact of leave request on office operations	
	c. Meets attendance requirements	
	Average rating:	
Comments:		
8. Diversity Model and ensure diversity and cultural competency (respect, inclusiveness, reflecting, valuing, and welcoming of cultural differences) in all position responsibilities regardless of race, ethnicity, religion, gender, social class, sexual orientation, ability, nationality, age, language, origin, or employment status.	a. Models behaviors that promote an open, welcoming, inclusive environment, consistent with Lanes Core Values	
	b. Proactively promotes diversity among employees at Lane	
	c. Creates and maintains a respectful working/learning environment	
	d. Cultivates an accessible working/learning environment	
	e. Responds appropriately, intervenes as necessary when Lane Core Values are at risk	
	Average rating:	
Comments:		

Section 2b: Division/Department Specific Factors

Please create factors that apply to your own Division/Department. Use these factors for performance criteria that are vital to the individual's position that are not otherwise covered by this instrument. Factors may include general skill areas, such as the examples listed below, or specific performance goals that are part of the unit's strategic plan. Discuss these factors to assure clarity of expectations with the employee at the beginning of the review period.

Division/Dept. Factors	Performance Criteria	Rating 1 = Does not meet expectations 2 = Partially meets expectations 3 = Meets expectations 4 = Exceeds expectations 5 = Significantly exceeds expectations
1.		
2.		
3.		
	Average rating:	
Comments:		

Section 3: Performance Highlights

The Performance Highlights section is provided to help the employees give a complete picture of what they have accomplished this year (Accomplishments), and then identification of knowledge, skills, or abilities they are interested in growing (Growth areas). This is also an area where the supervisor can provide input to proactively identify areas of growth. This section can also help the employee and their supervisor to begin identifying objectives to consider in the employee's Professional Development Plan.

Accomplishments:

List your major accomplishments (examples of documents to help identify accomplishments might include the Division/Department Unit Plan, committee work, job classification description, etc.)

Areas for Growth and/or Improvement

List areas for self-growth, or areas that have been identified for improvement

Appendices Planning Forms

Appendix A: Action Plan for to Improve Deficient Performance

Appendix A: Action Plan to Improve Deficient Performance (Used only in cases of remediation)

LCCEF Article 11.10.2 states "Reports of deficiencies shall include recommendations for remediation, time-lines, and a follow-up date for review. The following Action Plan is provided for that purpose.

Example...

Behavior to be corrected: **Employee Tardiness**

Date of meeting:

Strategy for remediation	Action Steps	Supportive Actions	Date to check progress	Deadline for completion
<i>Example: Clarify expectations, consistent with LCCEF, and consequences if expectations are not met</i>	<i>Meet the [name] to explore reasons for consistent tardiness to build understanding</i>	<i>Understand cause of tardiness</i>		
	<i>Meet with [name] to review job description/classification, and expectations for hours of work; refer to LCCEF as needed</i>	<i>Clarification of expectations</i>	NA	
	<i>Set up follow-up meeting in two weeks to check progress</i>	<i>Partnering to check progress</i>		

Behavior to be corrected:

Date of meeting:

Strategy for remediation	Action Steps	Resources needed	Date to check progress	Deadline for completion

Appendices Planning Forms

Appendix B: Professional Development Plan – Phase 1 and Phase 2

Appendix B: Professional Development Plan (PDP) Optional

Purpose: To select personal opportunities for developing knowledge and skills in alignment with Lane's Strategic Direction.

Phase 1 is to put your objectives in order (align) them for maximum benefit for you, the department and the college.

Phase 2 is about making a workable plan to accomplish your goals; and make sure they match the college's strategic direction. (For more information on alignment; please reference Lane's Strategic Directions listed on the first page of this document, the Lane website or the poster in your workspace.)

Instructions: You will complete Phase 1 and Phase 2

- ✓ Complete performance review with manager
- ✓ Manager will schedule a meeting at least one week past review date to discuss your planning and alignment goals.
- ✓ Choose three (3) specific and detailed objectives for coming year
- ✓ **Use the Phase 1 form to identify your goals.**
- ✓ **Use the Phase 2 form to document a plan to accomplish your goals.**

Phase 1: Alignment perspective (to assure institutional impact as well as individual growth)

Alignment Perspective			
Performance Objectives...	Departmental Goals...	Division/Dept. Specific Factors...	Lane Strategic Directions...
What you intend to do next year?	Which departmental goals does your objective align with?	What Unit Job Specific Factors will your objective impact?	Which of Lane's Strategic Directions will your objective impact? How?
Objective:			Transforming the... <input type="checkbox"/> Students' Lives <input type="checkbox"/> College Organization <input type="checkbox"/> Learning Environment How?
Objective:			Transforming the... <input type="checkbox"/> Students' Lives <input type="checkbox"/> College Organization <input type="checkbox"/> Learning Environment How?
Objective:			Transforming the... <input type="checkbox"/> Students' Lives <input type="checkbox"/> College Organization <input type="checkbox"/> Learning Environment How?

Phase 2: Professional Development Action Plan

In Phase 1 you identified what you wanted to accomplish (objectives) and looked to see that your objectives aligned with organizational directions. In Phase 2, you will operationalize your objectives for the year.

- A. State your performance objective and target dates to begin and check progress
- B. Identify action steps to help you reach your objective (what you will do)
- C. Identify professional development experiences that will provide the knowledge and/or skills, to meet your objective
- D. Identify resources you will need to meet your objective – be specific, as this is what you will negotiate with your manager

Performance objective... <i>What you intend to do next year, and when?</i>	Action Steps	Professional development activities that will help manager meet this objective <i>(What knowledge or experience do you need? What activity will help you get it?)</i>	Resources / Support Needed <i>What resources do you need (i.e., registration costs, travel expenses, release time, etc. – be specific)</i>	Performance outcomes Complete at the end of the year... <i>Specific progress you made (quantifiable where possible)</i>
Objective: Target date to start: Target dates to check progress?				
Objective: Target date to start: Target dates to check progress?				
Objective: Target date to start: Target dates to check progress?				