

Appendix C:

Performance Evaluation Process for Operations Associates, Operations Leads, and School Secretaries/Office Leads

Employee Name _____

Manager _____

Position _____

Evaluation Period _____ to _____

School / Dept _____

Date _____

Rate each item within each section using the rating system. Then, based on these ratings, determine the overall rating for each section. Section ratings will provide the basis for the Overall Rating. Please use 'N/A' if the category is not applicable.		Unsatisfactory Needs Improvement Satisfactory Very Good Outstanding Not Applicable						Use the space below to describe employee's strengths and weaknesses. Ratings of Unsatisfactory, Needs Improvement or Outstanding must be <u>substantiated by comments</u> . Indicate if a work plan will be developed.
		U	NI	S	G	O	N/A	
1. PRODUCTIVITY								
	Amount of work performed							
	Completion of duties and responsibilities							
	Overall Productivity							
2. QUALITY								
	Accuracy/Thoroughness							
	Verbal/ Written expression							
	Demonstrates initiative							
	Overall Quality							
3. WORK HABITS								
	Attendance/Punctuality							
	Compliance with University Prep policies and procedures							
	Effective planning and organization of work							
	Effective time management							
	Dependable & follows up on assignments							
	Overall Work Habits							
4. EFFECTIVE RELATIONS								
	Effective work relations with coworkers							
	Develops productive relationships with Administration, parents and students							
	Internal/External communications							
	Overall Effective Relations							
5. ADAPTABILITY								
	Performance in new situations							
	Performance in crisis situations or with unexpected demands							
	Performance with minimal instructions							
	Exercises independent judgment as required							
	Overall Adaptability							
6. MANAGERIAL ABILITY		Team Lead			Supervisor			
	Planning and assigning							
	Training and instructing							
	Evaluating performance of staff							
	Individual Leadership							
	Fairness and impartiality							
	Approachability & availability to staff							
	Ability to work within identified parameters of the department							
	Strategic leadership							
	Overall Managerial Ability							
OVERALL EVALUATION								
		U	NI	S	G	O	N/A	

Note: Additional comments should be attached.

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This report is based on my observation and/or knowledge. It represents my best judgment of the employee's performance.

This report has been discussed with me. My signature acknowledges receipt of review only.

Supervisor Signature

Date

Employee Signature

Date

Rating Definitions

Use the following performance criteria to rate the employee's performance.

U – Unsatisfactory

Performance is below minimum acceptable standards and expectations and does not meet the demands placed upon his/her position. A workplan with specific milestones and a timetable is required for immediate improvement and continuing employment.

NI - Needs Improvement

Performance meets only the minimum standards, and is below that of other employees in the department. Improvement is expected and needed through developing a workplan with specific milestones and a timetable.

S - Satisfactory

Performance fully meets standards and expectations, and is AVERAGE when measured against other employees in the department. A general work plan may be developed to facilitate improvement.

G – Great

Performance notably EXCEEDS expectations and demands of the job on various occasions, and is at a higher level than that of other employees in the department.

O - Outstanding

Performance SIGNIFICANTLY and CONSISTENTLY EXCEEDS expectations and demands of the job, and is markedly superior than 90% or more of employees in the school.

N/A – Not Applicable

Performance Criteria does not apply to this position.

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Performance Factor Definitions

Productivity
Amount of work performed: Defined by high productivity vs. low productivity. Handles workload efficiently and effectively and achieves production goals for self and/or staff.
Completion of duties and responsibilities: Completes work and projects on schedule. Demonstrates responsible handling of duties and deadlines. Diligent in completing work with minimal reminders.

Quality
Accuracy/Thoroughness: The thoroughness, accuracy, neatness and acceptability of the work completed. Pays attention to detail and maintains high standard of quality of work. Learns from previous mistakes.
Verbal/Written expression: Maintains a high standard of verbal/written communication. Able to successfully convey ideas and writes reports and memos which are clear and useful.
Demonstrates initiative: Demonstrated willingness to be proactive and make significant contributions with minimal direction. Seeks out new challenges and responsibilities.

Work Habits
Attendance/Punctuality: Overall attendance and adherence to work schedules, office hours and meeting requirements is acceptable. Follows protocols regarding attendance.
Compliance with Green Dot/School site policies and procedures: Adheres to established organizational and departmental protocols.
Effective planning and organization of work: Effectively manages assignments through setting of strategies and goals. Anticipates, identifies and takes action on problems. Demonstrates ability to track materials and work.
Effective time management: Manages priorities and time effectively. Puts in extra time and effort as needed when meeting deadlines and completing assignments.
Dependable and follows up on assignments: Being thorough in following through on assignments and projects in a reliable, trustworthy and timely manner.

Effective Relations
Effective work relations with coworkers: Contributes to a positive working environment. Manages conflicts and seeks resolution. Willingly helps and provides resources. Participates in joint goals and projects.
Develops productive relationships with Administration, parents and students: Establishes positive work relationships with stakeholders. Demonstrates ability to create and achieve desired outcomes.
Internal/External communications: Presents professional image internally and externally. Supports positive work relations.

Adaptability
Performance in new situations: Willing to try new concepts/techniques and quickly grasps essential elements of new assignments. Demonstrates flexibility.
Performance in crisis situations or with unexpected demands: Assesses situation and takes appropriate actions. Willing to modify approaches in dealing with different situations and different persons. Demonstrates problem-solving abilities.
Performance with minimal instructions: Able to determine course of action with minimal directions. Provides recommendations and operates within structural and budgetary parameters of the organizations.
Exercises independent judgment as required: Uses knowledge, experience, common sense and ethical standards to respond to varied situations. Weighs options and consequences before choosing a course of action in problem-solving.

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Managerial Ability
Planning and assigning: Plans, organizes, delegates and supervises effectively. Assesses resources and provides sound leadership/guidance. Ensures smooth transition of work, products or responsibilities between staff.
Training and Instructing: Provides training and requisite instruction to employees. Develops appropriate training materials and resources.
Evaluating performance of staff: Gives timely and constructive feedback to employees. Ensures accountability of each employee in following University Prep protocols, policies and procedures. Escalates issues when necessary and monitors issues with appropriate documentation.
Individual Leadership: Leads by example. Takes informed risks. Stretches for higher levels of performance. Able to determine pros and cons and make the most appropriate decisions within parameters of authority.
Fairness and impartiality: Promotes respect, honesty, integrity and fairness to all in the development of teams and employees within the unit.
Approachability and availability to staff: Promotes two-way communication and is accessible to staff when needed. Champions change.
Ability to work within identified parameters of the department: Able to work within departmental processes. Looks at overall system and provides suggestions on how to improve it.
Strategic leadership: Creates and achieves desired outcomes and goals through influence on organizational values, individual and group goals, processes and procedures. Develops and implements strategies.