

**Appendix C:  
Performance Evaluation Process for Teachers Assistants  
School Assistants, and School Secretaries/Office Managers**

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	VG	O	N/A	
<b>1. PRODUCTIVITY</b>								
	Amount of work performed							
	Completion of duties and responsibilities							
	<b>Overall Productivity</b>							
<b>2. QUALITY</b>								
	Accuracy/Thoroughness							
	Verbal/ Written expression							
	Demonstrates initiative							
	<b>Overall Quality</b>							
<b>3. WORK HABITS</b>								
	Attendance/Punctuality							
	Compliance with Green Dot/school site policies and procedures							
	Effective planning and organization of work							
	Effective time management							
	Dependable & follows up on assignments							
	<b>Overall Work Habits</b>							
<b>4. EFFECTIVE RELATIONS</b>								
	Effective work relations with coworkers							
	Develops productive relationships with Home Office staff and students							
	Internal/External communications							
	<b>Overall Effective Relations</b>							
<b>5. ADAPTABILITY</b>								
	Performance in new situations							
	Performance in crisis situations or with unexpected demands							
	Performance with minimal instructions							
	Exercises independent judgment as required							
	<b>Overall Adaptability</b>							
<b>6. MANAGERIAL ABILITY</b>		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							
	<b>Overall Managerial Ability</b>							
<b>OVERALL EVALUATION</b>								
		U	NI	S	VG	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.**

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Supervisor Signature

Date

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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. Employees with an overall rating of Unsatisfactory are not eligible for merit increases.

**NI - Needs Improvement**

Performance meets only the minimum standards, and is below that of similarly classified employees in the company. Improvement is expected and needed through developing a workplan with specific milestones and a timetable. Experienced employees performing at this level are not eligible for merit increases.

**S - Satisfactory**

Performance fully meets standards and expectations, and is AVERAGE when measured against similarly classified employees. Employees with an overall rating of Satisfactory are not eligible for merit increases. A general workplan may be developed to facilitate improvement.

**VG – Very Good**

Performance EXCEEDS expectations and demands of the job, and is at a higher level than that of most other employees in the same position. Employees with an overall rating of Very Good are eligible for merit increases according to Green Dot guidelines.

**O - Outstanding**

Performance SIGNIFICANTLY and CONSISTENTLY EXCEEDS expectations and demands of the job, and is markedly superior to that of similarly classified employees. Employees with an overall rating of Outstanding are eligible for merit increases according to Green Dot guidelines.

**N/A – Not Applicable**

Performance Criteria does not apply to this position.

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**Performance Factor Definitions**

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

<b>Quality</b>
<b>Accuracy/Thoroughness:</b> 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.
<b>Verbal/Written expression:</b> Maintains a high standard of verbal/written communication. Able to successfully convey ideas and writes reports and memos which are clear and useful.
<b>Demonstrates initiative:</b> Demonstrated willingness to be proactive and make significant contributions with minimal direction. Seeks out new challenges and responsibilities.

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

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

<b>Adaptability</b>
<b>Performance in new situations:</b> Willing to try new concepts/techniques and quickly grasps essential elements of new assignments. Demonstrates flexibility.
<b>Performance in crisis situations or with unexpected demands:</b> Assesses situation and takes appropriate actions. Willing to modify approaches in dealing with different situations and different persons. Demonstrates problem-solving abilities.
<b>Performance with minimal instructions:</b> Able to determine course of action with minimal directions. Provides recommendations and operates within structural and budgetary parameters of the organizations.
<b>Exercises independent judgment as required:</b> 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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<b>Managerial Ability</b>
<b>Planning and assigning:</b> Plans, organizes, delegates and supervises effectively. Assesses resources and provides sound leadership/guidance. Ensures smooth transition of work, products or responsibilities between staff.
<b>Training and Instructing:</b> Provides training and requisite instruction to employees. Develops appropriate training materials and resources.
<b>Evaluating performance of staff:</b> Gives timely and constructive feedback to employees. Ensures accountability of each employee in following Green Dot protocols, policies and procedures. Escalates issues when necessary and monitors issues with appropriate documentation.
<b>Individual Leadership:</b> 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.
<b>Fairness and impartiality:</b> Promotes respect, honesty, integrity and fairness to all in the development of teams and employees within the unit.
<b>Approachability and availability to staff:</b> Promotes two-way communication and is accessible to staff when needed. Champions change.
<b>Ability to work within identified parameters of the department:</b> Able to work within departmental processes. Looks at overall system and provides suggestions on how to improve it.
<b>Strategic leadership:</b> Creates and achieves desired outcomes and goals through influence on organizational values, individual and group goals, processes and procedures. Develops and implements strategies.