

# SCHOOL BOARD OF POLK COUNTY, FL



2018-2019

## **Non-Instructional Personnel Evaluation Handbook**

**School Board Approved: December 13, 2005**

**Professional Development Department**

**5204 US Hwy 98 S.**

**Lakeland, FL 33813**

**863.647.4277**

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**School Board of Polk County, FL**  
**Professional Development Department**

**NON-INSTRUCTIONAL PERSONNEL EVALUATION HANDBOOK**

Non-Instructional Employee Assessment Philosophy

Polk County's Non-Instructional Employee Assessment process focuses on improving employee performance and professional growth. Effective employee assessment results in improved effectiveness of our school system in meeting the needs of our students.

Polk County School's Non-Instructional Employee Assessment emphasizes the following:

- Individual ability and unique conditions that exist in each work site, and supervisor feedback.
- Helping employees to define individual strengths and weaknesses.
- Information to support decisions regarding promotion, transfer, reappointment, termination and salary adjustments.
- Employee morale
- Professional growth

Employee assessment is a process that requires considerable time, effort, and openness of both the employee and the supervisor conducting the evaluation. The process is continuous and ongoing throughout the year with emphasis on helping people become more effective. Strong emphasis is placed on improving employees' knowledge, skills, and quality of work. By all indications, the great majority of our employees are doing a good job. This assessment process, however, is designed to help that majority do an even better job and to help those employees who are not performing satisfactorily.

Each evaluator is responsible for establishing a positive rapport with employees. If either party has concerns, they should be expressed along with logical reasons and suggested means for improvement. In addition, each evaluator must be prepared to carry out the evaluation process properly. Above all, the assessment process should be viewed by both employees and supervisors as a helping process that will result in improved professional development and morale.

**School Board of Polk County, FL  
Professional Development Department**

**NON-INSTRUCTIONAL EMPLOYEE  
ASSESSMENT PROCEDURES AND CALENDAR**

In fulfillment of the Non-Instructional Employee Collective Bargaining Agreement, the Superintendent has established procedures for assessing the performance of all non-instructional personnel. These procedures are outlined on the following pages.

| <b>ACTION TO BE TAKEN</b>   | <b>DATE</b>   |
|---|---|
| 1. All non-instructional personnel in the school district will receive a copy of the Non-Instructional Personnel Evaluation Handbook [hardcopy as may be appropriate, but typically accessed electronically in Public Folders], which includes the Assessment form and the Procedures for conducting the assessment. The employee's supervisor will provide for the orientation of personnel, the Assessment form and Procedures.   | <i>Within 30 work days of new school year.</i>  |
| 2. The professional/personal goal section, if mutually agreed upon, is to be completed by the employee and supervisor.  | <i>Within 30 work days of new school year.</i><br><i>*New Employee = within 30 days of employment</i> |
| 3. Performance of non-instructional personnel will be assessed through observations of daily work. Appropriate assessment is continuous, ongoing, and takes place within the total job setting. Feedback will be provided regarding these observations in routine discussion with the employee. Employees who do not respond to routine feedback will be subject to progressive disciplines provided by the appropriate collective bargaining agreement. In addition to the self-evaluation process, these observations will be used as a basis for determining both areas of strength and areas for improvement.                     | <i>Dates will vary during the year.</i>   |
| 4. Should an interim meeting become necessary, please conduct within 90 working days. *Supervisors should be cognoscente of employees who are on 90 calendar day probationary status.   | <i>Within 90 working days.</i>  |
| 5. A performance review conference, based on the ongoing observations of employee work, will be made by the supervisor (at least) once a year. A written report of the review will be recorded on the evaluation form. Upon completion of the form, the supervisor will retain one copy to be kept on file at the school, give one copy to the employee, and forward one copy to their supervising Regional Assistant Superintendent, Senior Director or Assistant Superintendent who will confirm completion then submit to the District Office to be placed in the employee's permanent file in the Human Resource Services Office. | <i>By May 3, 2019</i>   |

6. Employees shall have ongoing input from their supervisor regarding any need for improvement in job performance. Should the employee fail to make the necessary improvements, a Professional Improvement Plan may be written when the supervisor feels that such a plan will help improve an employee's performance, especially for any performance rated as "Performing with needs" or "Significant needs" on the evaluation form. In addition, a Professional Improvement Plan will be prepared in all instances when an employee is not recommended for an upgrade, because of performance deficiencies. Likewise, the supervisor must give specific concrete examples to support any rating of exemplary performance.

*On-going as needed.*

7. In extenuating circumstances, such as extended illness, which cause the employee or supervisor to not meet the deadline, a written request for waiver will be sent by the supervisor to the Director of Employee Relations. The assessment report will then be completed by a time mutually agreeable to the employee and the supervisor.

*On-going as needed.*

8. Any disagreements regarding the assessment process that cannot be resolved in the evaluation review conference (step 3) may be referred to the appeal procedure. This procedure consists of the employee requesting a joint meeting with the supervisor. If it cannot be resolved at that level, then the employee may request a joint meeting with the supervisor and the Director/Senior Director or Assistant Superintendent as appropriate.

*On-going as needed.*

School Board of Polk County, FL

Professional Development Department  
District Non-Instructional Assessment

## Definitions for Rating Performance

### “EXEMPLARY PERFORMANCE”

This rating indicates that the individual has demonstrated mastery of the important strategies and skills through performance without significant error and has acted to internalize the strategies/skills in the job role, and/or has demonstrated expert knowledge as a resource for others and has exhibited a mental model of exceptional leadership when working with others in relation to the identified competency/goal. [*The individual has provided specific evidence of having performed all Priority Expectations related to the Essential Performance Criteria (EPC) at the highest level of quality and competence.*]

### “HIGH QUALITY PERFORMANCE”

This rating indicates demonstrated behavior in which the individual has carried out the important strategies and skills within their job duties and responsibilities without significant error and with relative ease, and/or has demonstrated the appropriate level of knowledge and/or mental model consistent with the identified competency/goal and EPC Priority Expectations.

### “SATISFACTORY PERFORMANCE”

This rating indicates that the employee has performed job duties and responsibilities at a basic level. For example, the employee arrived on time, followed directions, and the overall quality of work and mastery of job skills were average.

### “PERFORMING WITH DEVELOPMENTAL NEEDS”

This rating indicates developing performance in the job role in that the individual has demonstrated behavior in performing some of the important strategies and skills within their job duties and responsibilities at an adequate level, and/or has demonstrated some level of knowledge and/or mental model consistent with the identified competency/goal; however, there is evidence of demonstrated behavior indicating developmental needs related to other important strategies and skills and/or knowledge/mental model associated with the identified competency/goal [*and EPC Priority Expectations.*]; preparation and implementation of a Professional Improvement Plan is NOT required if informal processes to address the identified needs are being applied by the administrator and supervisor.

### “SIGNIFICANT NEEDS”

This rating indicates significant developmental needs in that the individual has made a number of errors, perhaps even some that are critical, when performing important strategies and skills within their job duties and responsibilities, or by completing only a rough approximation of them, and/or has demonstrated a limited understanding of related knowledge, and/or has exhibited a mental model that is not congruent with the identified competency/goal [*and EPC Priority Expectations.*]; this rating indicates performance which lacks quality and is below expectation; this rating requires the development and implementation of a Professional Improvement Plan.

**School Board of Polk County, FL  
Professional Development Department  
2018-2019 District Non-Instructional Assessment Page 1 of 3**

|                           |  |   |  |  |  |             |  |
|---------------------------|--|---|--|--|--|-------------|--|
| <b>Last Name</b>          |  | <b>First Name</b>   |  | <b>Location</b>                              |  | <b>Date</b> |  |
|                           |  |   |  |  |  |             |  |
| <b>SAP Employee ID #</b>  |  |   |  | <b>Last Six Digits of Social Security #</b>  |  |             |  |
|                           |  |   |  |  |  |             |  |
| <b>Appraisal Activity</b> |  | <input type="checkbox"/> <b>Interim</b> <input type="checkbox"/> <b>Summary</b> |  | <b>Essential Performance Criteria (EPCs)</b> |  |             |  |

Self-Assessment (Employee)                      Description                      Priority Expectations                      Summary Assessment (Supervisor)

|   |   |  |   |
|---|---|--|---|
| <p><b>A. Professionalism</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>          | <p>Arrives to work on time and completes assigned tasks. Dresses appropriately and approaches assigned tasks in a positive manner. Serves as a team member to help to create a positive work environment.</p> | <ul style="list-style-type: none"> <li>Arrives to work on time</li> <li>Demonstrates a customer focused orientation</li> <li>Assists schools in relation to job function</li> <li>Adheres to all School Board Policies</li> <li>Dresses appropriately</li> </ul>                                     | <p><b>A. Professionalism</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> <b>Significant Needs</b><br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>   |
| <p><b>B. Initiative</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>               | <p>The willingness to take action to improve self and work quality. Takes responsibility for leading and helping others to improve overall performance.</p>   | <ul style="list-style-type: none"> <li>Recognizes significant issues/problems in area of responsibility and acts to address them</li> <li>Anticipates organizational problems</li> </ul>   | <p><b>B. Initiative</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>               |
| <p><b>C. Quality/Quantity of Work</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/> | <p>Having to do things better than before by setting goals that encourage self to reach higher standards. Holding high expectations for the growth and development of everyone at work.</p>                   | <ul style="list-style-type: none"> <li>Shows appreciation for individual and group efforts and accomplishments</li> <li>Demonstrates attention to detail as assigned tasks are accomplished</li> <li>Looks for new or innovative ideas, methods and programs to meet the District's needs</li> </ul> | <p><b>C. Quality/Quantity of Work</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/> |
| <p><b>D. Communication</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>            | <p>Effective expression in individual or group situations, expresses ideas effectively in writing and speaks effectively as required by job. Prepares written reports and correspondence as required.</p>     | <ul style="list-style-type: none"> <li>Demonstrates high level of visibility</li> <li>Models ethical behavior</li> <li>Completes projects assigned and in a timely manner</li> <li>Models good listening skills and works to understand others</li> </ul>  | <p><b>D. Communication</b></p> <input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br><p><b>Comments:</b></p> <hr/> <hr/> <hr/>            |

Original – Employee

Copies- Supervisor, Senior Director/Assistant Superintendent

**School Board of Polk County, FL**  
**Professional Development Department**  
**2018-2019 District Non-Instructional Assessment Page 2 of 3**

|   |  |   |  |  |  |   |  |
|---|--|---|--|--|--|---|--|
| <b>Last Name</b>  |  | <b>First Name</b>   |  | <b>Location</b>  |  | <b>Date</b>   |  |
|   |  |   |  |  |  |   |  |
| <b>SAP Employee ID #</b>  |  | <b>Last Six Digits of Social Security #</b>   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |
| <b>Self-Assessment (Employee)</b>   |  | <b>Description</b>  |  | <b>Priority Expectations</b>   |  | <b>Summary Assessment (Supervisor)</b>  |  |
| <b>E. Working Together</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:         |  | Getting others to work together; effectively changing one's own behavior to fit the situation; being able to discover and communicate understanding of the ideas of others and responding with understanding.   |  | <ul style="list-style-type: none"> <li>• Leads problem solving teams</li> <li>• Serves as a resource to others</li> <li>• Promotes team work</li> <li>• Promotes working and communicating among departments</li> </ul>  |  | <b>E. Working Together</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:         |  |
|   |  |   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |
| <b>F. Critical Thinking</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:        |  | The gathering and analysis of data from multiple sources before arriving at an understanding of an event or problem; being able to see relationships and identify ideas from the data and developing alternatives when problem solving or making decisions. |  | <ul style="list-style-type: none"> <li>• Creates and explains the processes used in the work place</li> <li>• Evaluates and recommends improvements for how work is accomplished. Looks at the “work system” and seeks to improve.</li> <li>• Accomplishes tasks appropriate to District Strategic Plan</li> </ul> |  | <b>F. Critical Thinking</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:        |  |
|   |  |   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |
| <b>G. Decision-Making/Judgment</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments: |  | The readiness and confidence to make or share decisions; using appropriate levels of involvement so that actions may be taken and commitments made by self and others.  |  | <ul style="list-style-type: none"> <li>• Acts to solve problems in area of responsibility</li> <li>• Involves others in decision-making as appropriate</li> <li>• Uses common sense in solving problems</li> </ul>   |  | <b>G. Decision-Making/Judgment</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments: |  |
|   |  |   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |
| <b>H. Work Organization</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:        |  | The "know-how" (knowledge and skill) to design, plan and organize activities to achieve goals, to accomplish tasks, and to acquire feedback on the progress of work being done.   |  | <ul style="list-style-type: none"> <li>• Follows up on all aspects of assigned responsibility</li> <li>• Applies monitoring systems effectively</li> <li>• Work area promotes safety and organization.</li> </ul>  |  | <b>H. Work Organization</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:        |  |
|   |  |   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |
| <b>I. Professional Competence</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:  |  | Demonstrating knowledge, skills, and attitudes associated with a specific set of task areas in the job role.  |  | <ul style="list-style-type: none"> <li>• Demonstrates knowledge and skills in areas of responsibility</li> <li>• Participates in, and applies knowledge from, professional development activities and training</li> </ul>  |  | <b>I. Professional Competence</b><br><input type="checkbox"/> Exemplary Performance<br><input type="checkbox"/> High Quality Performance<br><input type="checkbox"/> Satisfactory Performance<br><input type="checkbox"/> Performing with Needs<br><input type="checkbox"/> Significant Needs<br>Comments:  |  |
|   |  |   |  |  |  |   |  |
|   |  |   |  |  |  |   |  |

Original – Employee

Copies- Supervisor, Senior Director/Assistant Superintendent



**School Board of Polk County, FL  
Professional Development Department  
2018-2019 District Non-Instructional Assessment Page 3 of 3**

| Last Name                | First Name | Location   | Date |
|--------------------------|------------|--|------|
|                          |            |  |      |
| <b>SAP Employee ID #</b> |            | <b>Last Six Digits Only of Social Security #</b> |      |

**Supervisor – Identify areas in which improvements must be made and implement a Professional Improvement Plan:**

**Employee- List major strengths or skills:**

**Employee – List areas in which improvements could be made:**

**Employee lists at least two professional or job related personal goals to be accomplished during this school year.**

|                              |
|------------------------------|
| <b>1.</b>                    |
| Anticipated Completion Date: |
| <b>2.</b>                    |
| Anticipated Completion Date: |
| <b>3.</b>                    |
| Anticipated Completion Date: |

**Employee Comments:**

**Supervisor Comments:**

|  |  |
|--|--|
|  |  |
|--|--|

**Employee Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Supervisor Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**School Board of Polk County, FL  
Professional Development Department  
Non-Instructional Professional Improvement Plan**

| <b>Employee Name</b>   | <b>Last Six Digits of Social Security #</b>    | <b>SAP ID #</b>                    |                               |
|--|--|------------------------------------|-------------------------------|
| <b>Essential Performance Criteria in Need of Improvement</b> | <b>Activities Planned to Improve Each Goal</b> | <b>Anticipated Completion Date</b> | <b>Actual Completion Date</b> |
| <b>1.</b>  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
| <b>2.</b>  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
| <b>3.</b>  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |
|  |  |                                    |                               |

\_\_\_\_\_  
**Employee Signature**

\_\_\_\_\_  
**Date**

\_\_\_\_\_  
**Supervisor Signature**

\_\_\_\_\_  
**Date**

