



ALAMEDA COUNTY OFFICE OF EDUCATION

**ALAMEDA COUNTY
OFFICE OF EDUCATION
MANAGEMENT TEAM
MEMBER HANDBOOK**

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Alameda County Office of Education

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November 16, 1999

Dear Alameda County Management Team:

As the Alameda County Superintendent, I fully support the Mission and Goals of this organization. Critical to the Mission and essential to the attainment of these Goals, is the requirement of having a well qualified and professional Management staff. To this end, I pledge my commitment to the managers that I will maintain high standards of performance and ethics as well as give the corresponding support.

This Management Team Handbook has been developed by incorporating established norms and industry standards to describe conditions of employment with the Alameda County Office of Education. These conditions are established so as to bring consistency and fairness to all management staff. The conditions have been developed and written to provide the parties of a working relationship means for addressing the individual needs as well as the overall requirements of the agency.

The Alameda County Office of Education is based on the premise that all employees have a shared responsibility to achieve the Mission, and to create and maintain a positive climate within the workplace. I offer the following Standards and Expectations:

- Treat each individual with dignity and worth
- Assist each individual to realize her/his greatest potential in the use of talents and skills
- Support teamwork and individual initiative
- Interact with others in a professional, responsible, and respectful manner
- Promote high expectations for performance and accountability to achieve established goals
- Value quality, excellence, and continuous improvement
- Support innovation and creativity
- Model and promote clear, frequent, and honest communication within the organization
- Recognize and reward excellence in performance
- Utilize participatory decision making and problem solving

There will be an annual review of the contents of this handbook. Each year a report will be developed by the Chief Human Resources Officer and presented to me on or about the month of March. This report shall include comparison studies regarding conditions of employment, management input by committee, and a recommended competitive factor for adjusting compensation. I will direct that a draft of accept recommendations be circulated to Management Staff and that a final draft be presented at an All Management Team Meeting.

It is with great enthusiasm and appreciation for this Management Team that I submit this Handbook and the standards that it represents.

Respectfully,

Sheila Jordan
Alameda County Superintendent

SJ:RM:rg

MISSION STATEMENT

The Alameda County Office of Education promotes student achievement and development through leadership, innovation, and accountability in partnership with the public, educational community, and parents.

GOALS

- Promote academic achievement
- Develop partnerships to deliver high quality programs
- Provide accountability through focused areas of responsibility
- Communicate accurate and timely financial, legislative and educational information
- Establish and encourage reciprocal communications
- Provide innovative leadership in technology
- Provide comprehensive professional development
- Improve delivery of services – technology, fiscal, and support

DRAFT

Alameda County Office of Education

Communications and Problem Solving Model

Philosophy

Recognizing that solutions are the keys to changing problems into opportunities, and that communications is a key to the generation of solutions it is essential to any healthy organization that an open process of communications and problem resolution be encouraged. To that end, it is the responsibility of each employee in the Alameda County Office of Education to exercise responsibility for communicating concerns, suggestions, or the simple sharing of information with appropriate colleagues and supervisors, such that conflicts are minimized, problem-solving behavior is encouraged, and all parties have an opportunity to share their point of view.

All employees have a shared responsibility to treat one another professionally, speak respectfully, listen attentively, and make every effort to resolve differences in a fair, equitable way. It is the responsibility of any employee who has concerns to share those concerns with his/her immediate supervisor, as it is essential that concerns be dealt with by those directly affected. It is most productive if issues are dealt within a timely way. However, it is the responsibility for those sharing concerns to determine the timing and the form for the communication.

The County Office of Education philosophy dictates that every employee work directly with staff and supervisors in such a way as to allow problems to be addressed at the lowest and most appropriate level in our organization. In the event that this process does not result in satisfactory resolution of problems, then it is expected that the issue would be brought to the next highest level of authority in the organization. In situations where this recourse is elected, it is most productive if both parties involved with the issue meet together with the next highest responsible manager to resolve the problem.

We believe that the process of communication and problem solving outlined above focuses responsibility for problem solving on individuals most directly involved, while providing a framework for open communication and creative problem solving.

EMPLOYMENT STATUS

CERTIFICATED MANAGEMENT EMPLOYEE

1. **Certificated Manager** – unlike his/her counterpart in a local school district, a county office of education regular certificated manager does not receive tenure at any time (except as noted in 2, below) and is never classified as a permanent, probationary or substitute employee. The certificated manager serves at the pleasure of the employer and may be under contract for no longer than six (6) months beyond the current superintendent's term of office.
2. **Certificated Manager with Displacement Rights** – a certificated manager with displacement rights is one who has taught as a classroom teacher for the ACOE and has obtained permanency as a teacher for the ACOE prior to becoming a manager. Such an employee shall have permanency as a classroom teacher only and does not obtain permanency as a manager.

CLASSIFIED MANAGEMENT EMPLOYEE

Classified managers, upon initial employment, shall serve a probationary period in a paid status. During this probationary period a classified manager serves at the pleasure of the EMPLOYER and may be dismissed at any time by the EMPLOYER, or his designee.

Upon successful completion of the probationary period, a classified manager shall gain permanent status in the position.

CATEGORICALLY FUNDED MANAGEMENT EMPLOYEE

A management employee hired pursuant to a program which is funded categorically on a year-to-year basis is not classified as a permanent, probationary or substitute employee. The manager serves at the pleasure of the EMPLOYER and is given an annual contract with specific conditions of employment and separation.

TEMPORARY CONTRACT MANAGEMENT EMPLOYEE

A temporary management person employed under a contract of undetermined duration is employed under the terms mutually agreed upon in writing by the employee and the EMPLOYER. A temporary contract manager serves at the pleasure of the EMPLOYER and is not classified as a permanent, probationary or substitute employee.

PART-TIME PERSONNEL

Part-time employees are persons in positions who are hired on a regular basis, but for less than a normal 7.5-hour day or 37.5-hour week. Part-time employees accrue rights to vacation and absence due to illness benefits as do full-time employees, except that their eligibility is proportional.

Performance Assessment Philosophy

Personnel performance assessment must be based upon our County Office of Education management philosophy and it must be an integral part of a management system dedicated to improving the productivity of all County Office personnel. To achieve this goal, evaluation must be a partnership between the County Office of Education and its employees, dedicated to encouraging and maintaining high standards of performance through teamwork and collaboration.

Key elements of this collaborative evaluation process include:

- Interacting in a professional responsible and respectful way
- Encouraging exceptional performance
- Fostering effective two-way communication
- Encouraging creativity and innovation
- Accurately assessing the full range of employees duties and responsibilities
- Implementation by skilled and trained staff

(Management Performance Evaluation Form Attached)

Appendix G

I. SALARY

A. Salary Schedule

1. The Superintendent shall pay to each Management Team member a salary stated on the Management Team Salary Schedule.
2. Longevity
 - a. Management Unit members shall be eligible for incremental increases of \$2,500 and \$5,000 based upon the following criteria:
 - 9-14 years of service with a county office of education or school district — \$2,500 shall be added to the member's appropriate step on the salary schedule.
 - 15+ years of service with a county office of education or school district — \$5,000 shall be added to the member's appropriate step on the salary schedule.
 - b. For an employee to be eligible for longevity step increase, a minimum of four years of his or her service must be with the Alameda County Office of Education.

II. FRINGE BENEFITS

A. Health & Welfare Benefits

The Superintendent shall continue to provide an IRC, 125 Cafeteria Plan which includes the following options: medical plan premiums, premium conversion, unreimbursed medical expense, dependent care, life insurance, vision, disability benefits, and cash-out option.

B. Medicare Coverage

Upon adoption of the Optional Medicare Program pursuant to AB 265, Chapter 1006, Management Unit members employed prior to April 1, 1986, and not covered by Medicare are eligible to participate in the Medicare program at the employee's option. Each member who meets the eligibility requirements of AB 265, Chapter 1006, and elects to participate shall receive three (3) years of prior service credit, the cost of which shall be borne by the Superintendent.

Participating employees shall pay 1.45 percent of taxable earnings and the Superintendent shall pay 1.45 percent.

III. WORK YEAR

A. Work Year Calendar

1. Prior to July 1 of each year, each unit member shall meet with his or her supervisor to develop a work year calendar. A copy of the approved work year calendar shall be filed with the Human Resources Office. The total number of work days may only be charged by the employer and made available to the Executive Cabinet.
2. Managers shall schedule all non-workdays or vacation days each fiscal year. Special circumstances will be considered for modification of this requirement on a case-by-case basis by the Division Chief. This provision may be waived for the first-year manager by the respective Division Chief.

B. Workweek

The standard workweek shall be Monday through Friday, unless mutually agreed upon by the manager and the respective Division Chief. All management are salaried employees and are not subject to overtime provisions or hourly rates.

C. Transfer of Accumulated Leave

Managers promoted internally may bring forward accrued vacation days not to exceed the standards provided herein. Final approval will be made by the employer.

D. Certificated Management

1. Work Year — Certificated Management

- a. The designated work year for Certificated Management shall be two hundred and twenty-two (222) workdays. On July 1 of each year, the non-workdays shall be determined by subtracting 222 workdays, all weekend days, and twelve (12) holidays from the total number of days in the fiscal year. The remaining balance shall be the total non-workdays for the fiscal year.
- b. With the approval of the Division Chief, a manager may develop with his or her supervisor a work year of fewer than 222 workdays. Compensation for a work year shall be computed according to the formula specified in paragraph 2 below. Final approval will be made by the employer.
- c. Management employees may not work more than 222 days per year without prior approval of the Division Chief and the employer.
- d. Twelve (12) holidays shall be scheduled by the Superintendent each fiscal year as specified in Appendix E.

2. Daily Rate — Certificated Management

Certificated Management employee's compensation shall be paid at the daily rate computed as follows:

Annual Salary ÷ 222 days = Daily Rate (A divisor of fewer days will be used for less than a 222 day work year.)

E. Classified Management

1. Work Year — Classified Management

- a. The designated work year for Classified managers shall be 222 work days, 27 paid vacation days and twelve (12) paid holidays equaling 261 days.
- b. With the approval of the Division Chief, a member may develop with his or her supervisor a work year of fewer than 222 days. A Classified Manager who is assigned to work less than 222 days shall have their salary prorated based on 1,957.5 hours per year.

2. Daily Rate — Classified Management

Classified Managers compensation shall be paid at the daily rate computed as follows:

Annual Salary ÷ 261 days = Daily Rate for the purpose of any entitlement at the time of separation. The number of work days shall be used to calculate extra duty assignments. It is not usual or customary to recognize extra duty beyond the 222 work day schedule.

3. Vacation Leave

- a. Each Classified Manager shall be granted twenty-seven (27) vacation days per fiscal year. Regular full-time unit members shall earn vacation leave at the rate of 2.25 days for each month in which the member is in paid status for more than one-half of the working days in the month. A unit member in paid status for less than one-half of the working days in a month shall receive a prorated amount based on 0.0138 days of vacation credit for each hour of paid status.
- b. Earned vacation shall not become a vested right until completion of the initial six (6) months of employment.
- c. Classified Managers may be granted vacation leave prior to being earned at the discretion of the member's supervisor.
- d. If a manager is terminated and has been granted vacation which was not yet earned, the time used in excess of that earned shall be deducted from the member's last payroll check at the member's daily rate as computed in paragraph 2 above.
- e. Classified Managers may carry forward into a new work year a maximum of 27 vacation days.

4. Holidays

Classified Managers shall be entitled to twelve (12) paid holidays per fiscal year as specified in Appendix E.

IV. HOURS AND OVERTIME

- A. Each Management Team member shall work the total number of hours per week necessary to perform his/her duties, recognizing that there must be allowances for the kind of flexibility needed to fulfill managerial responsibilities, and to perform adequately all expected duties which may require work at unusual hours of the day and night. Managers shall leave information as to where they can be contacted in case of emergency. It is also acknowledged that managers have flexibility during the traditional work week to recognize and offset work done outside the traditional work week.
- B. Managers are recognized as exempt from overtime regulations pursuant to the Fair Labor Standards Act.

V. A. PROMOTIONS

Employees promoted internally to Management positions may be placed on the salary schedule at other than Step A—based on years of service and training—upon the recommendation of the Division Chief and with the approval of the Superintendent.

B. PERSONAL PROPERTY

Personal property and equipment loss: Procedure 3800 of the Administrative Policies shall be applicable to Managers regarding personal property and equipment used and subsequently lost at the work site.

C. STAFF DEVELOPMENT

The Staff Development Program has been mutually agreed upon by the Superintendent and the ACSA County Charter. The ACSA County Charter shall provide programs for staff development for all managers who are members of local and state ACSA. The Superintendent shall provide payment to the ACSA County Charter according to the amount billed for these services.

VI. LEAVES

A. Sick Leave

Sick leave shall be granted at the rate of twenty-four (24) days per fiscal year and may be accrued without limit. Unused sick leave may be added to the member's retirement service credit, if eligible, upon retirement in accordance with regulations specified by STRS and PERS.

B. Other Leaves

Managers are eligible for all leaves specified below and shall comply with the regulations and provisions in Appendix F when requesting such leaves.

1. Military Leave
2. Jury Duty
3. Bereavement Leave
4. Industrial Accident or Illness Leave
5. Personal Necessity Leave
6. Extended Sick Leave
7. Professional Growth
8. Leave of Absence Without Pay
9. Catastrophic Leave

VII. RETIREE BENEFITS

A. RETIREMENT INCENTIVE PROGRAM

1. Eligibility

The Superintendent shall provide the retirement incentive program to Managers who meet the defined criteria listed below:

- a. Managers shall be fifty (50) years of age or older. (Classified, 55 years of age for certificated)
- b. Managers must have been employed with the Alameda County Office of Education for at least five (5) years.
- c. Managers must retire from the Alameda County Office of Education and enter PERS, ACRS, or STRS immediately following separation as a condition of this benefit.
- d. Retirement incentive benefits specified herein shall be prorated for part-time employees in accordance with the policies at the time of retirement.

2. Provision

Managers who retire under this agreement shall receive a one-time lump-sum payment in accordance with the following schedule:

- a. 9-14 years of service with a county office of education, school district, or equivalent = \$7,500.
- b. 14+ years of service with a county office of education, school district, or equivalent = \$10,000
(Equivalent experience shall be evaluated at the time of employment and recorded in the manager's personnel file.)

B. HEALTH AND WELFARE BENEFITS

1. Eligibility

The Superintendent shall provide retirement benefits to Managers who meet the defined criteria below:

- a. Manager shall be fifty (50) years of age or older. (Classified, 55 years of age for certificated)
- b. Manager must have been employed with the Alameda County Office of Education for at least five (5) years.
- c. Manager must retire under STRS or PERS.
- d. All retiree benefits specified herein shall be prorated for part-time employees in accordance with the policies at the time of retirement.
- e. Retirees shall be required to pay that portion of the monthly premium not paid by the Superintendent, prior to the last day of the month preceding the month for which coverage is provided. Failure to comply will result in loss of benefit under this section.
- f. Employee must have been enrolled in a medical insurance program for no less than one (1) year immediately preceding retirement, unless choosing the Cash Option.

2. Provisions

a. Medical Insurance

The Superintendent shall contribute an amount equal to the cost of the Kaiser Health Plan "S" for a single person who meets the requirements under PERS, ACRS, or STRS.

- (1) Eligible employees hired prior to July 1, 1992, who retire shall be provided health benefit coverage from the confirmed date of retirement for a period of ten (10) years. In the event an employee reaches age sixty-five (65) prior to the expiration of the ten-year benefit period, the employee shall be provided a Supplemental Medicare plan for the remainder of the ten-year benefit period. Upon expiration of the ten-year benefit period all payments shall cease.
- (2) Eligible employees hired on or after July 1, 1992, who retire shall be provided health benefit coverage from the confirmed date of retirement for a five (5) year benefit period. In the event an employee reaches age sixty-five (65) prior to the expiration of the five-year benefit period, the employee shall be provided a Supplemental Medicare plan for the remainder of the five-year benefit period. Upon expiration of the five-year benefit period all payments shall cease.
- (3) After the expiration of the benefit period stated in (1) and (2) above, the retiree, their spouse, and dependents shall be eligible to continue coverage under the designated group medical insurance plan at their own expense.

b. Dental Insurance

- (1) Retirees shall receive the Delta Dental Insurance Plan for a period of five (5) years from the confirmed date of retirement.
- (2) After the expiration of the benefit period, the retiree, their spouse, and eligible dependents shall be eligible to continue coverage under the group dental plan at their own expense.

c. Life Insurance

- (1) The Superintendent shall contribute an amount (not to exceed the amount provided to active employees) toward the purchase of life insurance for retirees for a period of five (5) years, from the confirmed date of retirement. Payment may be made to the retiree's insurance carrier, at the option of the retiree.
- (2) After the expiration of the benefit period the retiree, their spouse, and eligible dependents may continue coverage under ACOE's Group Life Insurance program at their own expense, if allowable under the terms and conditions of the designated insurance carrier.

d. Cash Option

Eligible retirees may select a cash option in the amount of two hundred dollars (\$200.00) per month in lieu of medical insurance premiums provided under section B.2.a., for a period of ten (10) years. In the event an employee reaches age 65 prior to the ten-year period, the employee shall be provided the cash option until age 70. No employee shall receive more than ten years of cash option payment.

e. Medicare

Upon eligibility for Medicare, retirees shall receive a coordinated Medicare plan. Should the premium on a coordinated plan result in a reduced total cost, the amount of the entitlement as computed above, the premium shall be paid by the Superintendent and the retiree shall waive any claim to the difference between his/her entitlement and the amount computed in accordance with the schedule above.

C. RETIREE PAYMENTS

Retirees, their spouse, and dependents electing to participate in any insurance program specified herein and who are required to pay all or part of the cost shall be subject to the following procedures:

1. The retiree/spouse shall pay two (2) months' premium at least ten (10) days in advance of the first month for which the premium is due, thereby paying one month's premium in advance.
2. Each month, thereafter, the monthly payment shall be made no later than the 25th of each month.
3. In the event the retiree/spouse fails to make the required payment, the Superintendent or his/her agent shall provide the retiree with thirty (30) days written notice of pending cancellation. If the retiree fails to make said payment after being appropriately notified as specified herein, the retiree's policy shall be cancelled due to nonpayment.
4. The Superintendent will provide the retiree with quarterly statements of their account.

Alameda County Office of Education

**Schedule for
In-County Mileage Reimbursement
Management**

Associate Superintendents	\$400.00
Assistant to the Superintendent	400.00
Business Services Advisors	150.00
Chief Human Resources Officer	400.00
Director I, Business Advisory Services	150.00
Director I, Financial Support Services.....	150.00
Director II, Communications/Public Relations	300.00
Director II, Development	350.00
Director III, Advisory Services	350.00
Director III, Information Technology.....	350.00
Director III, Internal Business	350.00
Director IV, CTAP.....	250.00
Director IV, External Business	350.00
Director IV, Information Technology Services	350.00

Travel/Conference/Mileage Reimbursement

Travel/Conference reimbursement shall be in accordance with Administrative Policy No. 3950 except that the mileage reimbursement rate shall be the Internal Revenue Service – non-reportable – mileage rate. Local travel and expense allowances shall be as established in Administrative Policy No. 3950.1

All other Managers submit expense claims when applicable.

Alameda County Office of Education

APPENDIX F
(Referenced in Section VI)

LEAVES

EXPLANATIONS AND CONDITIONS

1. Military Leave

Military Leave shall be granted to members pursuant to Military and Veterans' Code Section 395 and Education Code Section 45059.

2. Jury Duty

Members may be absent from duty to serve as jurors without loss of pay. Fees paid the member for such service shall be paid to the Superintendent. The member shall notify the immediate supervisor as soon as possible after the call to jury duty is received.

3. Bereavement Leave

Every member shall be entitled to three (3) days of paid leave of absence, or five (5) days if travel of more than two hundred (200) miles is involved, on account of the death of any member of his/her immediate family. This leave shall not be deducted from sick leave. An additional three (3) days may be granted upon request of the manager.

4. Industrial Accident or Illness Leave

Industrial Accident or Illness Leave shall be available to members pursuant to Education Code Section 44984.

The Superintendent shall provide worker's compensation coverage to protect members for expenses due to on-the-job injuries.

This coverage will provide benefits to the full extent of California law and will include but not be limited to temporary disability benefits, permanent disability benefits, death benefits, mileage reimbursement, and complete medical coverage. All these coverage benefits shall be provided at no cost to the member.

The benefits provided in this Article are in addition to sick leave benefits. Accordingly, the Superintendent shall not deduct from accumulated sick leave the Industrial Accident and Illness Leave used by a member who is absent as a result of an industrial accident or illness.

As a condition of receiving full salary while on Industrial Accident or Illness Leave, the member shall endorse over to the Superintendent all monies received

from the worker's compensation insurance carrier on account of such industrial accident or illness.

5. Personal Necessity Leave

A member may use up to six (6) days of accumulated sick leave each school year for personal necessity. Such leave shall be taken in no less than half-day increments.

Personal Necessity Leave shall be limited to circumstances that are serious in nature and that the member cannot reasonably be expected to disregard, and that necessitates immediate attention, and cannot be taken care of after work hours or on weekends.

Members shall notify their immediate supervisor as soon as possible of the need to take Personal Necessity Leave and upon return shall within five (5) days certify that the leave was taken in accordance with this Article, using the appropriate form.

Personal Necessity Leave may not be approved for the following reasons:

- A. Engaging in or seeking gainful employment.
- B. Attendance at or participation in activities that are primarily for the member's pleasure, amusement, or personal convenience.
- C. The primary purpose of holiday or vacation extension.
- D. Engaging in a strike, demonstration, picketing, rally, campaigning, or political activity.
- E. Accompanying a spouse on a trip.
- F. Taking an examination or engaging in other activities related to advanced training that is unrelated to current professional responsibilities.

6. Extended Sick Leave

A management member shall be entitled to one hundred (100) days of Extended Sick Leave per fiscal year following the exhaustion of all accrued regular sick leave. Extended sick leave shall be paid at one hundred percent (100%) of the member's daily rate.

While on Extended Sick Leave, a member shall be entitled to full fringe benefits.

7. Professional Growth

A member with the Superintendent's prior approval, may be granted paid leave for the purpose of improving performance. Such leave may be used to attend professional workshops and conferences, or other activities related to the performance of the Supervisor's duties and responsibilities. Employees shall be reimbursed for expenses incurred attending such workshops.

8. Leave of Absence Without Pay

A member may request a Leave of Absence Without Pay. If the requested leave period is for more than one-half of the work year, then the request shall be made at least five (5) weeks prior to the leave's starting date.

The written request shall include reason(s) for the leave, beginning and ending dates, and shall be directed to the Superintendent who shall respond to the request within five (5) days of receipt of the request.

While on leave the member may elect to continue all fringe benefits at the member's expense.

Upon returning from leave, the member may be entitled to reinstatement in the same or similar position to the one held before the leave.

9. Castastrophic Leave

A catastrophic leave pilot program exists as set forth in Appendix F-2.

Alameda County Office of Education

MANAGER'S PERFORMANCE EVALUATION

NAME: _____

EVALUATOR: _____

BASIC MANAGEMENT FUNCTIONS DEFINED:

- 1. PLANNING: Anticipating future events and client needs, establishing objectives, and determining resources required to meet objectives.
2. ORGANIZING: Arranging functions, grouping activities, and designing roles of people to support the plan.
3. STAFFING: Providing enough competent people to support the plan and organizational structure.
4. DIRECTING: Deciding who must do what by when; communicating the decisions and motivating people to meet the objectives.
5. CONTROLLING: Measuring, identifying, and correcting variances from plan to ensure objectives are met.

MANAGEMENT SKILLS

1. PLANNING

1.1 SETTING OBJECTIVES: Defines performance objectives relevant to office, division, section, or unit goals. Maintains objectives, current and achievable. Improvement Needed Adequate to Job Demands Fully Satisfied Remarks:

1.2 SPECIFYING STANDARDS: Identifies reliable indicators of satisfactory performance for key responsibilities. Provides systematic and accurate data for measuring progress to objectives. Improvement Needed Regularly Meets Requirements Exceeds Requirements Remarks:

1.3 DESIGNING PROGRAMS: Develops tasks and sequences of tasks to meet objectives. Establishes rules and procedures for effecting inter-unit-section-division coordination. Schedules work and allocates resources consistent with objectives. Improvement Needed Regularly Meets Requirements Exceeds Requirements Remarks:

2. ORGANIZING

2.1 DESIGNING STRUCTURE:
Defines and organizes functions and resources for smooth work flow and coordination of efforts. Establishes tasks in support of objectives and maintains integrity of organization structure for efficient work performance, communications, and decision making.

Improvement
____ Needed

Satisfactory
____ Progress

Demonstrates
____ Strength

Remarks:

2.2 DELEGATING ROLES:
Gives responsibility and authority to qualified individuals according to predetermined plans. Holds each position accountable for results.

Improvement
____ Needed

Regularly Meets
____ Requirements

Excellent
____ Delegator

Remarks:

2.3 INTEGRATING RELATIONSHIPS:
Modifies and balances structure to achieve team effectiveness. Maintains flexibility and adapts functions to changes and identified needs of clients. Integrates function with office plans.

Improvement
____ Needed

Adequate to
____ Job Demands

Exceptional
____ Skill

Remarks:

3. STAFFING

3.1 SELECTING PERSONNEL:
Defines job requirements and position specifications, screens qualified people and recommends for employment those persons who have the ability and desire to perform.

Improvement
____ Needed

Satisfies
____ Requirements

Exceeds
____ Requirements

Remarks:

3.2 EVALUATING POTENTIAL:
Accurately assesses capacity of personnel for increased responsibility. Identifies best direction, timing, and kind of new experiences for personnel.

Improvement
____ Needed

Satisfies
____ Requirements

Exceeds
____ Requirements

Remarks:

3.3 DEVELOPING STRENGTHS:
 Expands knowledge, develops confidence, establishes pattern of success of personnel; provides skills training and counsels personnel. Reviews progress with praise and constructive criticism.

Improvement _____ Satisfies _____ Exceeds _____
 Needed _____ Requirements _____ Requirements _____

Remarks:

4. DIRECTING

4.1 DECISION MAKING:
 Arrives at appropriate conclusions; demonstrates powers of objectivity, fact-seeking, and analysis; makes sound and timely judgments under pressure.

Improvement _____ Meets Job _____ Strong
 Needed _____ Requirements _____ Capability _____

Remarks:

4.2 COMMUNICATING:
 Maintains adequate flow of information in day-to-day work relationships; conducts efficient meetings; listens attentively; speaks to the point; keeps staff, superior, and lateral co-workers informed.

Improvement _____ Satisfactory _____ Surpasses _____
 Needed _____ Progress _____ Requirements _____

Remarks:

4.3 LEADING AND MOTIVATING:
 Encourages and inspires people to take necessary actions. Causes people to accomplish desired results. Obtains the best performance that people have to give.

Improvement _____ Adequate to _____ Excellent
 Needed _____ Job Demands _____ Motivator _____

Remarks:

5.0 CONTROLLING

5.1 MEASURING PERFORMANCE:
 Reviews performance; determines how results compare to objectives according to prescribed performance standards; tests standards and results for reliability.

Improvement _____ Adequate _____ Standards
 Needed _____ Progress _____ Well Established _____

Remarks:

5.2 IDENTIFYING DEFICIENCIES: _____ Improvement Needed _____ Adequate to Job Demands _____ Maintains Complete Grasp
 Pinpoints significant deficiencies from standards. Analyzes and tests for cause of deficiencies.
 Remarks:

5.3 CORRECTING DEFICIENCIES: _____ Improvement Needed _____ Regularly Meets Requirements _____ Exceptionally Strong Control
 Develops alternative courses of action to correct deficiencies; weighs risks, costs, obstacles, and unwanted consequences for corrective actions. Implements corrections effectively with proper timing, resulting in desired effect.
 Remarks:

Additional Comments by Evaluator:

Employee's Comments:

Employee: *I have seen and discussed this report with my manager.*

EMPLOYEE'S SIGNATURE

DATE

EVALUATOR'S SIGNATURE

DATE

Instructions to evaluator: Send original, signed copy to Human Resources.
 Make a photocopy for employee and one for your files.

Rg:rick:mgreval