



Quick Guide for Support Staff Performance Appraisals

When do I conduct Performance Appraisals?

There are four types of evaluations that are conducted depending on the status of the employee:

1. Probationary Period (Article 2.31)

This is a four month period served by the employee when he/she is new to the District. This is to determine his/her suitability to become a regular employee. **An evaluation is done at 4, 10 and 15 weeks.**

2. Trial Period (Article 2.32)

This is a three (3) month period served by an employee to determine his/her suitability in a particular classification where the employee has not yet completed a trial period. **An evaluation is done at 4 weeks and 11 weeks.**

3. Evaluation Period (Article 2.33)

All employees who transfer to a new location by promotion, demotion or transfer **shall serve an evaluation period of up to but not exceed one (1) month** if they have previously served a trial period in that particular classification. An evaluation is done at 4 weeks.

4. Bi-Annual Evaluation Period

Employees who have been evaluated in accordance with Article 2.31 and 2.32 and remain in the same location thereafter will be evaluated on performance every two (2) years from the date of the previous evaluation.

Please Note: Performance appraisals can be conducted at times other than what is indicated in the Collective Agreement. It is recommended that supervisors perform performance appraisals whenever they see fit. Supervisors are encouraged to use the appraisal forms on an ongoing basis, and to use them as a developmental tool for the employee

Which Performance Appraisal form do I use?

There are two supervisor forms that can be used:

1. **Full Appraisal Form** – May be used for:
 - Probationary Period – Week 15
 - Trial Period – Week 11
 - Minimum every 2 years from the last performance appraisal

- As required by supervisor
2. **Short Appraisal Form for Probationary and Trial Periods** - May be used for:
- Probationary Period – Weeks 4 and 10
 - Trial Period - Week 4
 - Use of the short form is optional. The full form may still be used in weeks 4 and 10.

It is imperative that the final appraisals for the probationary and trial period are completed in weeks 15 and 11. Once the probationary period ends in week 16 and the trial period ends in week 12, performance issues not addressed will not be taken into account to determine suitability of employee. If performance issues are addressed prior to the cut off dates, they can be addressed and acted on appropriately.

The new appraisal forms have been designed to be more specific to particular jobs. Below are the class specifications and the appraisal form to be used together.

CONFIDENTIAL PERFORMANCE APPRAISAL FOR GROUP “A”

- Clerk-Typist
- Career Centre Assistant
- Data Entry Clerk
- Learning Resources Clerk
- Mail Clerk

CONFIDENTIAL PERFORMANCE APPRAISAL FOR GROUP “B”

- District Office Clerk
- District Office Clerk (Payroll)
- Education Centre Secretary
- Elementary School Clerk
- Learning Resources Clerk
- Payments Clerk
- Payroll Clerk

CONFIDENTIAL PERFORMANCE APPRAISAL FOR GROUP “C”

- Accounting Technician I and II
- Head Secretary – Elementary School
- Library & Information Technologist
- Payroll Assistant
- Purchasing Clerk
- Records Management Clerk
- Secondary Information Management Clerk
- Secondary School Clerk
- Senior Learning Resources Clerk

CONFIDENTIAL PERFORMANCE APPRAISAL FOR GROUP “D”

- Buyer and Senior Buyer

- Head Secretary– Secondary School
- Head Clerk - Learning Resources
- Research Analyst
- Senior Accounting Assistant
- Senior District Office Clerk
- Senior Learning Resources Clerk
- Senior Payroll Assistant

CONFIDENTIAL PERFORMANCE APPRAISAL STUDENT SUPPORT

- ABA Support Worker
- Aboriginal District Cultural Facilitators
- Aboriginal Education Assistant
- Aboriginal Child/Youth Care Workers
- Educational Visual Language Interpreters
- Oral Communication Facilitator
- Child/Youth Care Workers
- Special Education Assistant (Autism)
- Special Education Assistant I
- Special Education Assistant II
- Substance Use Liaison
- Y.E.S. Coordinator

The development of a strong, competent support staff is essential to the smooth functioning of a school system. The Surrey School District expects all employees to make continuous efforts to improve their work and/or provide an opportunity for growth. Similarly, the Surrey School District expects their managers to assist employees through supervision and through the performance review and development process. The purpose of the process is to provide employees with the opportunity to grow and meet their individual performance expectations. This will require support from both the supervisor and the employee as constant communication is vital to make this system valuable.

The legend to be used for the performance appraisals is as follows:

Legend:	
E	Exceeds - Significantly and consistently exceeds the job requirements
M	Meets – Consistently meets the job requirements
ID	Improvement Desired - Does not yet meet the job requirements, some improvement required
IE	Improvement Essential – Significantly below the requirements, improvement required
NA	No opportunity or not applicable -Staff member has not had an opportunity to perform this duty

The performance criteria identified in the performance appraisal and their definitions are as follows:

Demonstrated Skills and Abilities – Assessment of the application of skills and knowledge required to achieve the expected performance.

Communication and Team Work – Listening, understanding, and responding combine to create effective interaction with others. They include the principle of dealing with people in a direct, open, trusting, and respectful manner. Similarly, there is a willingness to work closely with colleagues or with other employees toward a common goal.

Planning and Organization - Ability to plan and establish priorities and respond effectively to established timelines.

Adaptability, Flexibility – Ability to work effectively in a variety of situations, and with various individuals or groups. It entails understanding and appreciating different and opposing perspectives on an issue, adapting one's approach to the changes at hand, and easily accepting such changes as directed by the District.

Initiative – Takes action without being prompted; is willing to take appropriate risks once all aspects of the matter have been taken into account.

Problem Solving – Demonstrates one's ability to accomplish a task or to solve problems. This includes dealing with increasingly challenging circumstances, making sound decisions, and presenting opinions effectively.

The employee must see the complete form and sign it. If the employee does not agree with the appraisal, the employee should be encouraged to comment in the space provided. The employee's signature, therefore, does not constitute agreement with the appraisal; it simply acknowledges that the report has been discussed with the employee and that the employee has been given the opportunity to comment.

The appraisal forms are to be distributed as follows:

- The original form sent to Human Resources
- A copy for your files
- A copy for the employee
- A copy to the union (CUPE Local 728)