Colorado Springs Schools

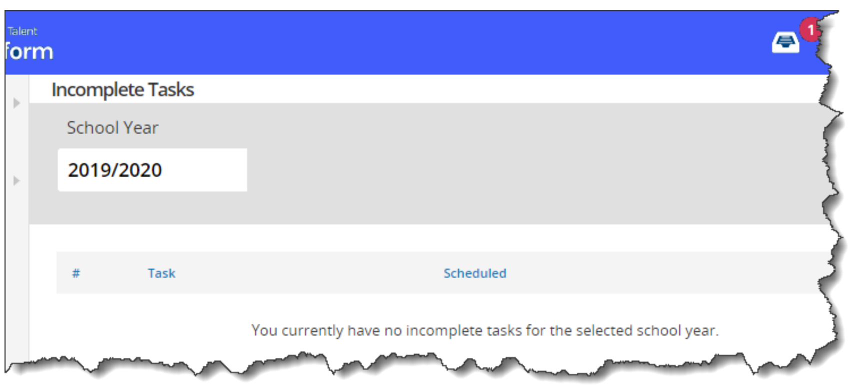
How do Supervisors complete Summative Evaluations for Employees?

The purpose of the Summative Evaluation is for you, the supervisor, to engage your employee in a professional conversation focused on furthering your discussions regarding performance, Mid-Year Evaluation, and remediation plans or professional growth plans as appropriate. The Summative Evaluation will include an overall numeric rating of performance indicators from the Indicators Worksheet rubric included within the evaluation form.

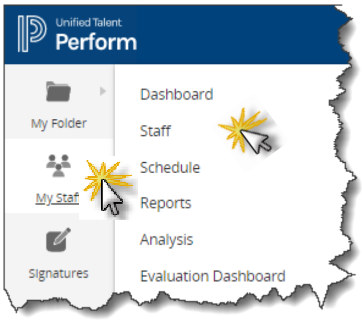
It is expected that this evaluation take place in a face to face conference. In anticipation of this conference you are able to work on the Summative Evaluation form, save your progress, and share its contents with the employee to review prior to the conference. If you prefer not to share the findings prior to the meeting you can prepare the evaluation, save your progress, and then go over the form with the employee during the conference. At the conclusion of the conference you will electronically submit your findings for their signature. See also HELPFUL HINTS /USEFUL TOOLS AT THE END OF THESE DIRECTIONS.

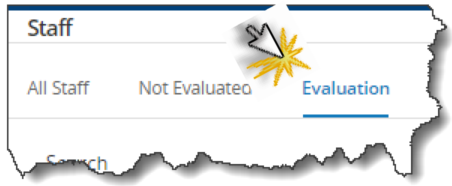
After logging into Perform it will open directly to your incomplete task page.

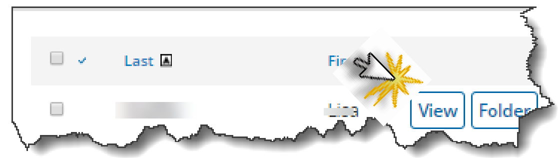
- At this point in the year, you will have completed your Training/Orientation Statement as well as your Professional Growth Plan so they will no longer be listed as incomplete items. This page is **YOUR** personal evaluation "home" page.



- Click on **MY STAFF** then **STAFF** (This will bring up a list of employees that you are responsible for evaluating)
- Notice tabs at the top of the page. You should be looking at **EVALUATION**.
- Find the **EMPLOYEE'S NAME** from the list.
- Click **VIEW** to the right of the name.







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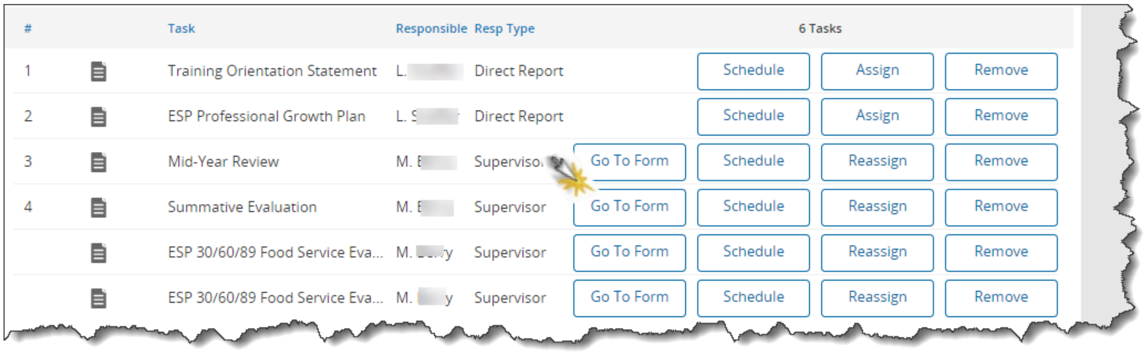
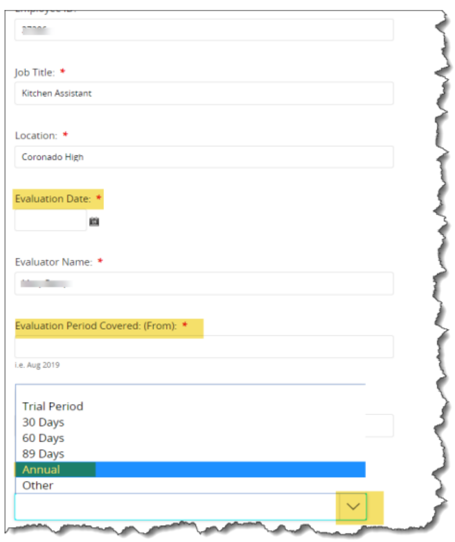
- Click **GO TO FORM** across from the Summative Evaluation title.



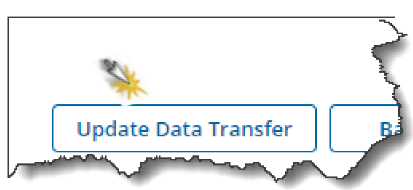
- Once the form opens, you will notice the some of the standard information is filled in for you. You will need to fill in the rest of the required information. (Date, Period Covered, etc.)

- In the Reason for evaluation drop box, choose **ANNUAL**.

- The employees Professional Growth Plan will automatically populate into the required areas. If it has not, then you will need to manually prompt the system to do so.



- Scroll to the bottom of the page and click **UPDATE TRANSFER**.



- Click the “**RELOAD THIS PAGE**” button at the top left of your computer screen to refresh the screen.

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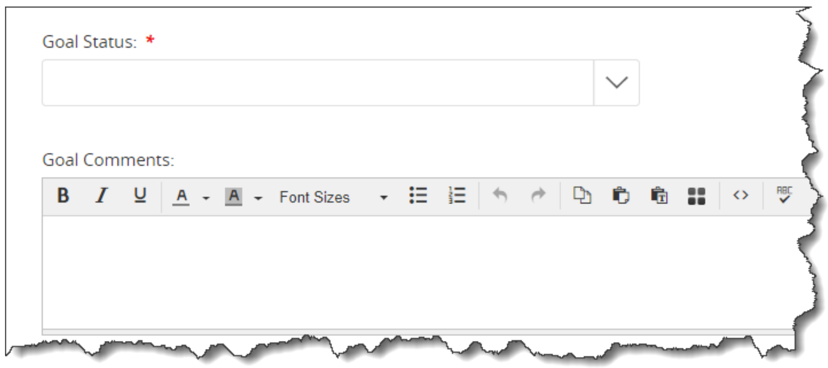
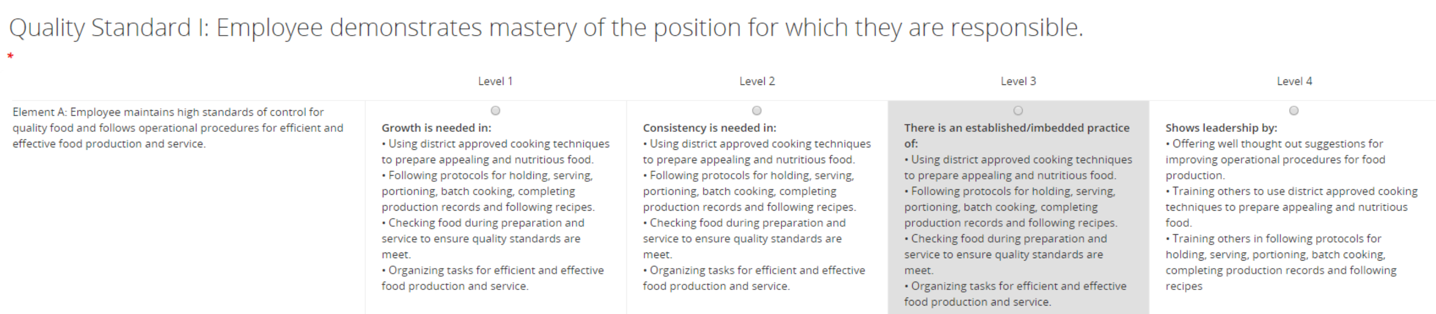
- Next, choose from the **DROP-DOWN** menu where the employee is in regards to their professional growth plan goals and then enter comments supporting your selection.



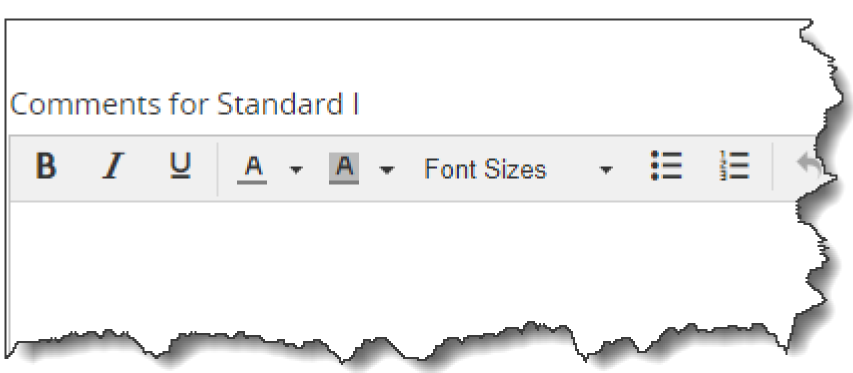
- Proceed to **QUALITY STANDARD 1** and using the Indicator Worksheet, select the corresponding level to indicate the employee's performance.
    - **a.** This is an example of one element within one quality standard; there are several in the form so be mindful to **mark ALL elements within ALL quality standards.**



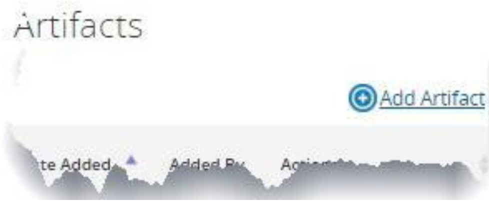
Quality Standard I: Employee demonstrates mastery of the position for which they are responsible.
*

	Level 1	Level 2	Level 3	Level 4
Element A: Employee maintains high standards of control for quality food and follows operational procedures for efficient and effective food production and service.	**Growth is needed in:** • Using district approved cooking techniques to prepare appealing and nutritious food. • Following protocols for holding, serving, portioning, batch cooking, completing production records and following recipes. • Checking food during preparation and service to ensure quality standards are meet. • Organizing tasks for efficient and effective food production and service.	**Consistency is needed in:** • Using district approved cooking techniques to prepare appealing and nutritious food. • Following protocols for holding, serving, portioning, batch cooking, completing production records and following recipes. • Checking food during preparation and service to ensure quality standards are meet. • Organizing tasks for efficient and effective food production and service.	**There is an established/imbedded practice of:** • Using district approved cooking techniques to prepare appealing and nutritious food. • Following protocols for holding, serving, portioning, batch cooking, completing production records and following recipes. • Checking food during preparation and service to ensure quality standards are meet. • Organizing tasks for efficient and effective food production and service.	**Shows leadership by:** • Offering well thought out suggestions for improving operational procedures for food production. • Training others to use district approved cooking techniques to prepare appealing and nutritious food. • Training others in following protocols for holding, serving, portioning, batch cooking, completing production records and following recipes

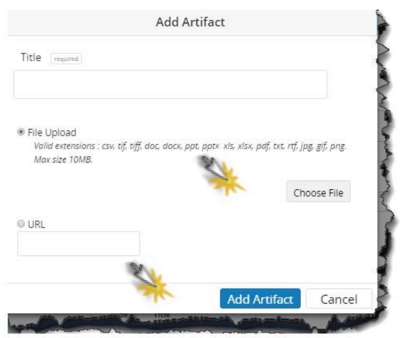
- There is a comment box following all quality standards for you to enter any supporting **COMMENTS**.



- If you have any certificates of training, Remediation Plans, or other documents that you would like uploaded to the evaluation, you will need to add them to the **ADD ARTIFACT** tab BEFORE SIGNING.
  a. Click on **ADD ARTIFACT**



  b. **CHOOSE FILE** to locate the file you would like to upload or enter the URL and click **ADD ARTIFACT**



- Choose yes or no from the drop-down menu concerning Remediation Plans.

If you have developed a Remediation Plan with/for the employee you will need to attach it to the evaluation as an Artifact. See above for instructions.

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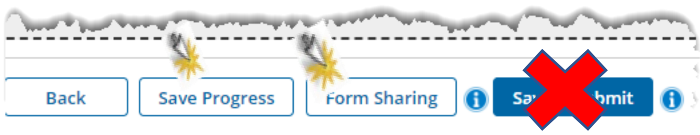
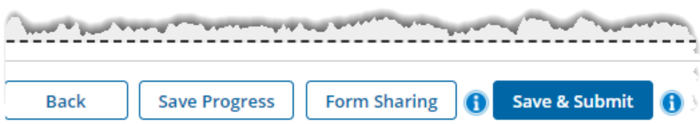
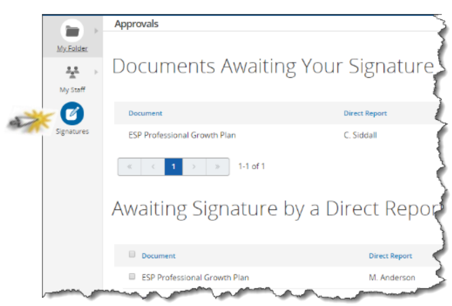
- IF you are completing these steps prior to the face to face conference then you can decide if you would like to share the preliminary evaluation with the employee for their review.
    a. If **YES**, then click on **FORM SHARING** at the bottom of the page.
    b. If **NO**, then click on **SAVE PROGRESS** so you can access your saved data during the conference.



- At the conclusion of your face to face conference you will electronically submit the form for the employee to sign by clicking **SAVE and SUBMIT.**



- After saving and submitting the form you will be able see that this document is now awaiting the signature by the direct report (employee).
    a. Click on the **SIGNATURE ICON** to see any documents awaiting your signature as well as any awaiting your direct reports/Employees.



    b. The **employee** will then need to log into Perform and **sign** the form themselves.

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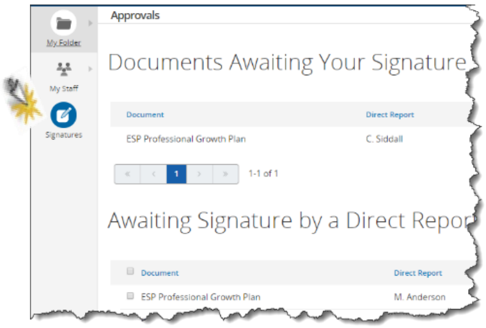
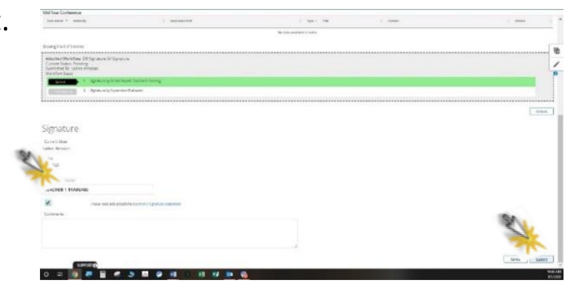
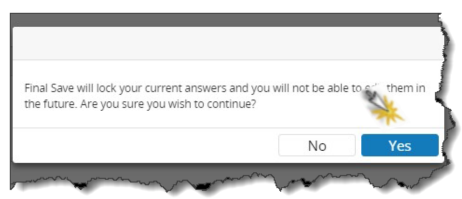
- After the employee has completed their signature, you will retrieve the document to **SUBMIT** your signature by:
    a. Again, click the **SIGNATURE** icon
    b. Locate the Summative Evaluation, listed under DOCUMENTS AWAITING YOUR SIGNATURE, and click **VIEW and APPROVE**, to the right.



- Scroll to the bottom and type your name in the **SIGNATURE BOX** then click on the box indicating that you have read and accept the Electronic Signature Statement. Finally click on the submit button on the bottom right.



- Click **YES**



As the last step, please make a copy of the COMPLETED AND SIGNED evaluation to be kept on site.

- The copy should only be printed AFTER all signatures have been captured so you will need to retrieve the document after all of the previous steps.
    - **Follow the directions at the beginning of these instructions to access the evaluation**.
    - Instead of choosing Go to Form you will choose **VIEW** (to view the completed form)
    - When the form opens you will notice a **PRINTER ICON** on the top right of the form
    - **Click** on the icon

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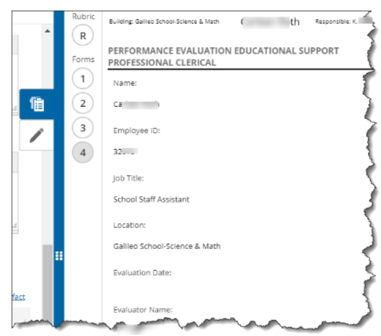
HELPFUL HINTS/USEFUL TOOLS

- You can save your progress at any time by clicking on **SAVE PROGRESS** button at the bottom of the form. You can return and pick up where you left off.

- You have access to every **EVALUATION PREVIOUSLY COMPLETED** for the employee while working in this evaluation.
  - Click on the clipboard icon on the far-right hand side of the page.
  - When the pop out opens, you can click on any of the **NUMBERS** shown.
  - Each number stands for corresponding evaluation.



- You have access to an area within the evaluation to **MAKE NOTES**, even throughout the year to assist you with its completion. (Notes are NOT visible to the employee)
  - Click on the **PENCIL ICON** on the far-right hand side of the page.
  - When the pop out opens, you can make notes, and use the select action drop down to assign a comment to a specific rubric area and other options.
  - After completing the note section click **ADD NOTE.**