



CS-58
r. 04.07.17

REPORT ON PROBATIONARY SERVICE

Board of City Service Commissioners

DER REPORT NO.

INSTRUCTIONS: Complete this form and return the original to the Department of Employee Relations – Pay Services Section before the end of the probationary period. Refer to Civil Service Rule VIII, Section 8 – Probationary Periods.

Copy to:

- Employee
- Department

1. Employee's Name (First, MI, Last)		2. Employee ID	
3. Job Title		4. Department/Division	
5. Appointment Date		6. Date Probationary Period Ends	
7a. Complete First Review by:		8a. Complete Second Review by:	
7b. Enter Factor Rating: (O, EJR, MJR, BJR, U)		8b. Enter Factor Rating: (O, EJR, MJR, BJR, U)	
PRODUCTIVITY _____ KNOWLEDGE _____ INITIATIVE _____ DEPENDABILITY _____ INTERPERSONAL RELATIONSHIPS _____		PRODUCTIVITY _____ KNOWLEDGE _____ INITIATIVE _____ DEPENDABILITY _____ INTERPERSONAL RELATIONSHIPS _____	
7c. Supervisor's Comments:		8c. Supervisor's Comments:	
7d. Employee's Initials/Date		8d. Employee's Initials/Date	
9a. Complete Final Review by:		9b. Enter Factor Rating: (O, EJR, MJR, BJR, U)	
		PRODUCTIVITY _____ KNOWLEDGE _____ INITIATIVE _____ DEPENDABILITY _____ INTERPERSONAL RELATIONSHIPS _____	
		9c. Supervisor's Comments:	
9d. Employee's Initials/Date			
<p>Listed below are the factors on which you are to evaluate the employee. Next to each factor are examples that describe performance at the MEETS JOB REQUIREMENTS level. These are provided as reference points for evaluating performance. Indicate your rating for each factor by entering the appropriate letters (O, EJR, MJR, BJR, U) in the boxes in items 7b through 9b. If you have not observed how this person performed on a given factor, or if the factor is not relevant to the position which you are rating, enter "NO" (NOT OBSERVED). Comments should be recorded in the boxes in items 7c through 9c for any factors that are rated <i>BELOW JOB REQUIREMENTS OR UNSATISFACTORY</i>. Attach additional page(s) as necessary.</p>			
<p>O = OUTSTANDING EJR = EXCEEDS JOB REQUIREMENTS MJR = MEETS JOB REQUIREMENTS BJR = BELOW JOB REQUIREMENTS U = UNSATISFACTORY</p>			
Factor		"MEETS JOB REQUIREMENTS" Standards and Expectations	
A. PRODUCTIVITY		<ul style="list-style-type: none"> Manages own time and uses appropriate work methods, techniques, and equipment to achieve the most effective and efficient result in the time available. Demonstrates skill and proficiency in carrying out assignments. Work product is accurate, thorough and effective, and meets quality standards. Work output matches expectations within established timelines. 	
B. KNOWLEDGE		<ul style="list-style-type: none"> Understands the needs and requirements of the job and applies skills and knowledge to perform the job competently. Understands the purposes, objectives, practices and procedures of the department. Demonstrates understanding of job procedures, methods, facts, and information related to assigned work. 	
C. INITIATIVE		<ul style="list-style-type: none"> Plans, organizes and prioritizes workload with little or no assistance. Offers suggestions on improving work methods and procedures. Willingly accepts suggestions for improvement and occasionally seeks counsel on performance and work habits. Accepts additional challenges and responsibilities, and adapts to changes. 	
D. DEPENDABILITY		<ul style="list-style-type: none"> Accepts responsibility for completing assignments and meeting deadlines. Reliably completes assignments on time with minimal follow-up from supervisor. Consistently punctual and regular in attendance and follows policy when requesting and reporting time off. Practices workplace safety rules and procedures on a consistent basis. 	
E. INTERPERSONAL RELATIONSHIPS		<ul style="list-style-type: none"> Establishes and maintains effective and productive working relationships with peers. Works cooperatively with supervisor(s) and as part of a team. Builds and maintains customer satisfaction by responding to the needs of internal and external customers. Readily accepts and applies constructive feedback to improve job performance. 	
10. In view of the performance of the employee rated above:			
<input type="checkbox"/> I certify that the employee's service has been satisfactory and that the appointment should become regular.			
<input type="checkbox"/> I am terminating the employee's appointment before the completion of the probationary period effective _____. [Termination Notice form CS-80 must be received in DER with this form.]			
<input type="checkbox"/> I recommend that the probationary period be extended for _____ months. The employee has been notified of this request and has been counseled regarding improvement needed. [This requires City Service Commission action. The Commission does not grant extensions for City Laborers. Send this request to the Employee Relations Director at least 30 days prior to the end of the probationary period.]			
SUPERVISOR (PRINT NAME)		SIGNATURE	
TITLE		DATE	
DEPARTMENT HEAD (PRINT NAME)		SIGNATURE	
TITLE		DATE	

REPORT ON PROBATIONARY SERVICE INSTRUCTIONS FOR SUPERVISORS/MANAGERS

Rule VIII, Section 8 of the Rules of the City Service Commission requires that a person appointed to a position or transferred to a different department or division or reinstated to a different department or division successfully complete a probationary period. The length of the probationary period is generally six months of actual service for positions classified as non-exempt from FLSA or twelve months of actual service for positions classified as exempt from FLSA with the exceptions of those positions designated in the Rule.

A regularly appointed City employee does not gain permanent civil service status and the rights associated with that status until they pass probation. Supervisors are responsible for welcoming and training probationary employees and for assessing their performance during the probationary period. Performance assessments shall be documented on the [Probationary Service Report](#), Form CS-58, on a quarterly basis.

The probationary period starts the date the employee is appointed. During the employee's first week of employment, provide a copy of the job description and probationary report form; discuss the performance factors that he/she will be evaluated on; and provide a timeline of when the formal evaluations will be completed. Formal evaluations should occur periodically throughout the probation period, with a final meeting just prior to the end of the probation. (e.g. formal meetings should be held after three months of the employee's service during a six-month probation period; and at approximately four and eight months of service during a twelve month probation). The purpose of the meetings are (1) to evaluate performance; (2) to provide feedback by developing specific plans to enhance performance levels or to correct deficiencies; and (3) to recommend for/against retention of the employee. Formal evaluations are in addition to the frequent informal feedback necessary for successful management of the probationary period.

Evaluation

The probationary period performance ratings must take into consideration that the employee being rated is new to the job. The performance levels of the new employee during the probationary period must not be compared with those of experienced employees. Instead, the examples of satisfactory performance levels on the front of the form should be benchmarks to evaluate job performance.

Procedure

Study the instructions and behavioral examples for the performance factors. Prepare for the evaluations by obtaining documentation such as informal notes, input from other supervisors, or productivity numbers.

During each formal evaluation, rate the employee in terms of their demonstrated performance. Discuss the performance with the employee and provide feedback and suggestions about performance improvement, where needed. Allow the employee to ask questions and assure that he/she understands the requirements for successful performance.

At the end of each evaluation session the employee must initial the line on the form to indicate that you have discussed the performance and expectations (item numbers 7c-9c). The initialing indicates that the evaluation was reviewed, not that there is implicit agreement with the evaluation.

Other documentation to show a record of on-going discussions with the employee may be attached to the form.

As part of the final evaluation session, you must indicate whether you recommend the employee for retention or if other action is warranted.

Ratings

OUTSTANDING– Performance at this level is superior. Performance always exceeds standard and expectations of the position.

EXCEEDS JOB REQUIREMENTS– Performance consistently exceeds all of the standards and expectations of the position. The employee is performing at a level well beyond what is normally expected.

MEETS JOB REQUIREMENTS – Performance consistently meets the standards and expectations of the position.

BELOW JOB REQUIREMENTS– Performance on the job is inadequate and does not consistently meet the standards and expectations of the position. To reach the standard required of a competent permanent employee by the end of the probationary period, greater effort and/or training will be needed.

UNSATISFACTORY– Performance on the job is unacceptable and demonstrates an inability or unwillingness to meet standards and expectations of the position. Special training, reassignment, or termination may be advisable.

Note: any rating of "BJR" or "U" must be substantiated by a written statement.

Extension of Probationary Period

Under certain circumstances, the City Service Commission may extend a probationary period. To request an extension you must submit the request directly to the Employee Relations Director with a letter that explains your reason(s) for the request and a description of the plan to address those concerns. Also include a copy of an [Employee Performance Improvement Plan](#) or other documentation to support your request. Your request must be made at least 30 days prior to the end of the probationary period.

Termination During Probation

Granting permanent status to a poor performer can create a negative workplace environment and be very time consuming for the manager. If an employee is not successful on the job, you do not have to wait until the end of their probation period to terminate their employment; you do have to show that you have provided the employee with the information, training and support they need to be successful. Termination may occur at any time during the employee's probationary period. A copy of the [Termination Notice](#), form CS-80 with a full statement of the reasons for termination must be filed with DER within three days of the termination.

Processing

After the final evaluation session, distribute the completed and signed form as indicated at the top of the form.

Questions? Contact your department's Human Resources Office or the Department of Employee Relations on 414.286.3394.