



March 17, 2014

MEMORANDUM

TO: District Board of Trustees

FROM: Jim Murdaugh, President 

SUBJECT: College Policy Updates: 06-05 - Probationary Period/Probationary Complaint, Policy 06-06 – Performance Appraisals, and Policy 06-08 - Anniversary Dates

Item Description

The College brings forth a request to update Policy 06-05 – Probationary Period/Probationary Complaint, Policy 06-06 – Performance Appraisals, and Policy 06-08 - Anniversary Dates.

Overview and Background

This item requests Board approval for updates to existing policies in Chapter 6 regarding probationary period/probationary complaint, performance appraisals and anniversary dates. Highlights of the policy changes are outlined below.

- Policy 06-05: For clarity, additional language was added to include Managerial Professional employee classification. Language regarding probationary termination procedure was added to the "Classified Staff/Managerial Professional Employees" section, and policy reference corrections were made.
- Policy 06-06: Policy was updated to delete anniversary date as the period of review.
- Policy 06-08: Policy was updated to reflect change in employee appraisal review period and business process. Language regarding assignment date was added for clarity.

Past Actions by the Board

The Board previously revised Policy 06-05, 06-06, and 06-08 on November 22, 2010.

Funding/Financial Implications

N/A

Staff Resource

Teresa Smith

Recommended Action

Approve updates to College policies as presented.

**TALLAHASSEE COMMUNITY COLLEGE
DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Probationary Period/Probationary Complaint	NUMBER: 06-05
AUTHORITY: Florida Statute: 1001.64, 1001.65 Florida Administrative Code: 6A-14.0261	SEE ALSO: • Board Policy 03-01:
DATE ADOPTED: 12/1/97; Revised 3/15/99, 1/22/01, 11/26/01, 11/22/10	

A. Managerial Professional/Classified Staff Employees

The first six (6) months of employment are considered probationary. If the employee is in a leave without pay status during the probationary period, the probationary period will be adjusted on a day for day basis.

In addition, an employee will be on a six (6) month probationary period for (1) a promotion not resulting from reclassification; (2) a lateral transfer requested by the employee.

An employee may be terminated with two weeks notice if, after a conference, it is determined that the employee cannot adequately perform the duties of the position. Two weeks notice is waived in instances warranting immediate dismissal.

B. Contract/Grant Employees

Each contract/grant project director shall designate in writing which positions in that contract/grant require a probationary period. The length of the probationary period and the use of annual leave during probation shall also be at the discretion of the contract/grant project director.

An employee may be terminated with two weeks notice if, after a conference, it is determined that the employee cannot adequately perform the duties of the position. Two weeks notice is waived in instances warranting immediate dismissal.

C. Probationary Employee Complaint

Employees who have not attained permanent status in their present position may report any complaints to the immediate supervisor. If the circumstances of the complaint prevent discussion with either first or next higher level supervisor or if the problem is not resolved within five work days from the first discussion of the complaint with the supervisor, an employee may discuss the problem with the Director of Human Resources.

The Director of Human Resources shall bring the matter to the attention of the appropriate College administrator or department head. A further investigation of the matter shall be made by the appropriate College administrator or department head who shall render a decision.

Probationary employees also have access to the Equity Complaint Procedure in Policy 03-01.

**TALLAHASSEE COMMUNITY COLLEGE
DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Probationary Period/Probationary Complaint	NUMBER: 06-05
AUTHORITY: Florida Statute: 1001.64, 1001.65 Florida Administrative Code: 6A-14.0261	SEE ALSO: <ul style="list-style-type: none"> • Administrative Procedure 06-05AP: Probationary Period/Probationary Complaint • Board Policy 03-00 Board Policy 03-01 and Administrative Procedure 03-00AP: Equal Opportunity Act
DATE ADOPTED: 12/1/97; Revised 3/15/99, 1/22/01, 11/26/01, 11/22/10	

A. Managerial Professional/Classified Staff Employees

The first six (6) months of employment are considered probationary. If the employee is in a leave without pay status during the probationary period, the probationary period will be adjusted on a day for day basis.

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An employee may be terminated with two weeks notice if, after a conference, it is determined that the employee cannot adequately perform the duties of the position. Two weeks notice is waived in instances warranting immediate dismissal.

B. Contract/Grant Employees

Each contract/grant project director shall designate in writing which positions in that contract/grant require a probationary period. The length of the probationary period and the use of annual leave during probation shall also be at the discretion of the contract/grant project director.

| ~~Similarly, a~~n employee may be terminated with two weeks notice if, after a conference, it is determined that the employee cannot adequately perform the duties of the position. Two weeks notice is waived in instances warranting immediate dismissal.

C. Probationary Employee Complaint

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The Director of Human Resources shall bring the matter to the attention of the appropriate College administrator or department head. A further investigation of the matter shall be made by the appropriate College administrator or department head who shall render a decision.

| Probationary employees also have access to the Equity Complaint Procedure in [Policy 03-01.0AP](#).

**TALLAHASSEE COMMUNITY COLLEGE
DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Performance Appraisals	NUMBER: 06-06
AUTHORITY: Florida Statute: 1001.64, 1001.65, 1012.855 Florida Administrative Code: 6A-14.0261, 6A-14.0262	SEE ALSO:
DATE ADOPTED: 12/1/97; Revised 1/22/01, 11/22/10	

The performance of each managerial/professional, classified staff, and contract/grant employee in relation to job requirements shall be appraised at least once a year.

An employee shall be expected to meet performance standards which have been defined and identified as part of the position requirements. Employee performance appraisals shall be used for the development of the employee and as a basis for stimulation of performance and morale.

A. Overview

The appraisal is a constructive tool used to stimulate the performance, morale, and development of employees. The primary value of the appraisal is the opportunity it presents to supervisors to promote productivity through objective measurement, constructive counseling, and timely recognition of effective performance. Properly used, the performance appraisal also provides supervisors with a means of determining individual or departmental training needs and/or working with employees experiencing problems which could result in disciplinary action.

A performance appraisal is the process of establishing standards of performance criteria, informing employees about these standards, and periodically informing employees about performance in relation to these standards.

B. Annual Appraisal

An annual appraisal of each managerial/professional, classified staff, and contract/grant employee shall be recorded on the approved form by the immediate supervisor.

C. Probationary Appraisal

Managerial/professional, classified staff, and contract/grant employees shall receive a six month probationary appraisal as outlined in Policy 06-05.

D. Below Expectation Annual Appraisal

An employee who receives a below expectation annual appraisal shall be placed on imposed probation; placement in these circumstances does require higher level approval.

E. Increases Based on Appraisal

A classified staff employee who receives a meets expectation appraisal within the prior fiscal year shall be eligible to receive a salary increase as outlined in the current Salary Schedule, based upon available funds and the approval of the Board.

A classified staff employee who receives a below expectation appraisal within the prior fiscal year shall not be eligible to receive an increase until the first of the month following attainment of a meets expectation appraisal.

F. Special Appraisal

A special appraisal may be done at any time during the year when the supervisor deems it necessary to document either significant performance improvement or deficiency. All special appraisals become a part of the employee's permanent record.

**TALLAHASSEE COMMUNITY COLLEGE
DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Performance Appraisals	NUMBER: 06-06
AUTHORITY: Florida Statute: 1001.64, 1001.65, 1012.855 Florida Administrative Code: 6A-14.0261, 6A-14.0262	SEE ALSO: <ul style="list-style-type: none"> • Administrative Procedure 06-06AP: Performance Appraisals • Board Policy 06-08 and Administrative Procedure 06-08AP: Anniversary Dates
DATE ADOPTED: 12/1/97; Revised 1/22/01, 11/22/10	

The performance of each managerial/professional, classified staff, and contract/grant employee in relation to job requirements shall be appraised at least once a year. ~~The date of the appraisal shall be on the employee's anniversary date as determined by the Human Resources Department.~~

An employee shall be expected to meet performance standards which have been defined and identified as part of the position requirements. Employee performance appraisals shall be used for the development of the employee and as a basis for stimulation of performance and morale.

A. Overview

~~The a~~Appraisal is a constructive tool used to stimulate the performance, morale, and development of employees. The primary value of the appraisal is the opportunity it presents to supervisors to promote productivity through objective measurement, constructive counseling, and timely recognition of effective performance. Properly used, ~~the~~ performance appraisal also provides supervisors with a means of determining individual or departmental training needs and/or working with employees experiencing problems which could result in disciplinary action.

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B. Annual Appraisal

An annual appraisal of each managerial/professional, classified staff, and contract/grant employee shall be recorded on the approved form by the immediate supervisor.

C. Probationary Appraisal

Managerial/professional, classified staff, and contract/grant employees shall receive a six month probationary appraisal as outlined in Policy 06-05.

~~Below Expectation~~Less Than Satisfactory Annual Appraisal

An employee who receives a ~~less than satisfactory~~below expectation annual appraisal shall be placed on imposed probation; placement in these circumstances does ~~not~~ require ~~any~~ higher level approval. ~~other than the supervisor's signature on the appraisal.~~

~~Step~~ Increases Based on Appraisal

A classified staff employee who receives a meets expectation~~satisfactory~~ appraisal within the prior fiscal year shall be eligible to receive a salary ~~step~~ increase as outlined in the current Salary Schedule, based upon available funds and the approval of the Board.

A classified staff employee who receives a below expectation~~less than satisfactory~~ appraisal within the prior fiscal year shall not be eligible to receive an ~~an~~ step increase until the first of the month following attainment of a meets expectation~~satisfactory~~ appraisal.

Special Appraisal

A special appraisal may be done at any time during the year when the supervisor deems it necessary to document either significant performance improvement or deficiency. ~~A special appraisal does not affect the status of the employee nor does it change the employee's anniversary date.~~

All special appraisals become a part of the employee's permanent record. ~~The special appraisal forms may be requested from the Human Resources Department.~~

**TALLAHASSEE COMMUNITY COLLEGE
DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Anniversary/Assignment Dates	NUMBER: 06-08
AUTHORITY: Florida Statute: 1001.64, 1001.65 Florida Administrative Code: 6A-14.0261	SEE ALSO:
DATE ADOPTED: 12/1/97; Revised 1/22/01, 11/22/10	

Anniversary dates are used to determine length of service for all College employees. Assignment dates are used to outline specific employment parameters, and track employment positions held with the College.

Original Appointment: the anniversary date of employees hired before July 1, 1985 with no subsequent class change shall be the date of hire in the class they occupied on July 1, 1985. The anniversary date of employees hired after July 1, 1985, is the date of hire.

Promotion/Demotion: the assignment date will change to the date of action when an employee is demoted or promoted. The only exception would be the recognition and title change for ten years service for custodial workers.

Reassignment: the anniversary and/or assignment date will not change when the employee and the position are reassigned. The assignment date will change to the date of the action when an employee is reassigned to a different position in the same pay grade.

Imposed Probation: the anniversary and/or assignment date of an employee will not be affected by placement on imposed probation.

Special Appraisal: the anniversary and/or assignment date of an employee will not be affected by a special appraisal.

Position Title Change and/or Reclassification: the anniversary date of an employee shall not be affected by a class title change. The assignment date will change to the date of the action when an employee is reassigned to a different position in the same pay grade.

Leave Without Pay: the anniversary and/or assignment date will not be adjusted when an employee is in a leave without pay status.

Re-evaluation for Below Expectation Performance: the anniversary and/or assignment date of an employee will not be affected by the reevaluation process for an employee with a below expectation appraisal as outlined in 06-06.

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DISTRICT BOARD OF TRUSTEES
P O L I C Y**

TITLE: Anniversary/ <u>Assignment</u> -Dates	NUMBER: 06-08
AUTHORITY: Florida Statute: 1001.64, 1001.65 Florida Administrative Code: 6A-14.0261	SEE ALSO: <ul style="list-style-type: none"> ● <u>Administrative Procedure 06-08AP: Anniversary Date</u> ● <u>Board Policy 06-06 and Administrative Procedure 06-06AP: Performance Appraisals</u>
DATE ADOPTED: 12/1/97; Revised 1/22/01, 11/22/10	

Anniversary dates are used to determine length of service for all College employees, the scheduling of performance appraisals for managerial/professional, classified staff, and contract/grant employees. Assignment dates are used to outline specific employment parameters, and track employment positions held with the College.

Original Appointment: the anniversary date of employees hired before July 1, 1985 with no subsequent class change shall be the date of hire in the class they occupied on July 1, 1985. The anniversary date of employees hired after July 1, 1985, is the date of hire.

~~**Probationary Period:** the anniversary date shall be adjusted day for day if a probationary employee is in leave without pay status during the probationary period.~~

Promotion/Demotion: the assignment anniversary date ~~will shall~~ change to the date of action when an employee is demoted or promoted. The only exception would be the recognition and title change for ten years service for custodial workers, ~~groundskeepers, and public safety officers.~~

Reassignment: the anniversary ~~and/or assignment~~ date ~~does not will not~~ change when the employee and the position are reassigned. The ~~assignment anniversary~~ date ~~will shall~~ change to the date of the action when an employee is reassigned to a different position ~~class~~ in the same pay grade.

Imposed Probation: the anniversary and/or assignment date of an employee ~~will~~shall not be affected by placement on imposed probation.

Special Appraisal: the anniversary and/or assignment date of an employee ~~will~~ shall not be affected by a special appraisal.

Class Position Title Change and/or Reclassification: the anniversary date of an employee shall not be affected by a class title change. The assignment date will change to the date of the action when an employee is reassigned to a different position in the same pay grade.

Leave Without Pay: the anniversary and/or assignment date ~~will~~shall not be adjusted ~~on a month-for-month basis~~ when an employee is in a leave without pay status ~~for more than twenty work days and is not serving a probationary period.~~

~~**Reclassification:** the anniversary date of any employee shall not be affected by reclassification of the position held by the employee.~~

Re-evaluation for Below Expectation~~Less than Satisfactory~~ Performance: the anniversary and/or assignment date of an employee ~~will~~shall not be affected by the reevaluation process for an employee with a below expectation~~less than satisfactory~~ appraisal as outlined in 06-06.