

HR BULLETIN

Emailed: September 2, 2008

ACCREDITING COMMISSION ALERT to ALL Ohlone CCD Managers and Employees: December 31, 2008 deadline for all classified employee performance evaluations!

Our District was notified by the Accreditation Commission that "... all district personnel will have current annual evaluations on file in the Human Resources Office as required by District policy and collective bargaining agreements" on or before **December 31, 2008**.

TIPS for Conducting The Performance Evaluation Conference

From now until the December deadline date, administrators and their classified employees will participate in individual evaluation "conferences." The following information is provided as a guide to evaluating employee performance.

Important Preface to the "Tips"

1. The Office of Human Resources is available as a primary resource, able to provide technical information and to assist any supervisor or employee in preparing for an upcoming performance evaluation conference.
2. Managers who are accountable for evaluating the performance of employees are the designated supervisors, who are responsible for the employee's work.
3. Managers ("raters") must alert their employees in advance of when the performance evaluation conference will be scheduled, its date/time/location, in order to allow time for the employee to prepare, and to assure sufficient time for meaningful discussion.
4. The performance evaluation conference is conducted in a private room, free from telephone interruption or visitors.

Advance Planning and Preparation - MANAGER:

Advance planning and effective preparation for this important one-on-one meeting requires that the manager review the following:

- a) Most recent performance evaluation completed for the employee in this position
- b) Current job description
- c) Most recent work goals and objectives, and the degree of progress made to date
- d) Any pertinent performance training, coaching, counseling and/or additional resources during the rating year, and the dates, reasons and results
- e) Special projects, workloads or work modifications during the rating year that demonstrated specific and notable, job-related employee skills
- f) Previous discussions, corrective action, and follow-up related to performance problems and issues during the rating year

Advance Planning and Preparation - EMPLOYEE:

The employee is responsible for preparing for the evaluation conference, and should be asked to review the following:

- a) Current job description
- b) Most recent performance evaluation completed for the current position
- c) Goals and objectives established during the most recent evaluation and progress made toward their completion
- d) Accomplishments and attained goals and objectives during the work year
- e) Desired goals and objectives for the upcoming rating year
- f) Previous discussions with the manager regarding commendations and/or improvements needed

The Performance Evaluation Conference

The one-on-one performance evaluation conference includes key discussion points and written notations. Managers (“raters”) may find the following list to be a helpful guideline for conducting the conference:

1. Review the generic job description and discuss the established performance standards, and the standards used to train and guide the employee (does the employee know what you expect from a “good performer?”) Since these performance standards constitute the “rules of the game,” the manager’s task is to assure that they are clear, concise, and well known by the employee.
2. Discuss the manager’s and employee’s assessment of performance in each of the twelve rating “factors” and note supporting examples (include dates and specifics) of work completed. Conclude with a discussion of the overall quality of the work.
3. Written Supervisor comments and suggestions on the evaluation form almost always flow on to additional sheets that are attached to the evaluation form. Comments are written in support of, and to clearly explain the rating for each factor. Manager comments also serve to document the important points that were discussed with the employee during the conference.
4. Discuss the “high points” of the rating year: within the context of the job, what were the employee’s accomplishments and successes during this period of time? Include dates whenever possible.
 - *What were the accomplishments and successes of the rating year, in his/her opinion?*
 - *Were there special commendations or recognition given to the employee by others, outside of the department?*
 - *Were previously established performance goals “met?” If so, how well? If not, what factors interfered?*
 - *Which of the rating factors were most highlighted by, or descriptive of, the employee’s accomplishments and successes?*
5. Discuss work-related areas that need performance improvement, with specifics that correlate to the department mission, job description, and established performance standards. The manager’s task is to provide a clear explanation of the following:
 - Specific description of the problematic behavior and/or performance (include dates whenever possible)
 - The impact or effect of the problematic behavior/performance on department or office operations, customer service, public relations, credibility, etc.

- Specific information about the manager’s expectation – what does “satisfactory” performance look like in this area? What should the employee be doing?
- What improvements are needed, why they are needed, and how these improvements relate to the department mission, employee’s current job description and/or required standard(s) of performance.

Also,

What additional supervisor coaching, training, resources, or clarifications are required for the employee to improve in these specific areas so that next year’s evaluation can reflect satisfactory or better performance?

What coaching, counseling, training, resources and/or other management assistance or clarification could contribute to the improvement of performance?

What will the employee be 100% accountable for doing in order to improve?

Which of the twelve rating factors most appropriately reflects the weak performance area(s)?

Evaluation Conference Conclusion and Follow-up

The evaluation conference concludes with the discussion of any additional comments that the employee may have, and the manager’s explanation of “next steps” in the process:

1. The manager may supplement or correct the completed performance evaluation form and accompanying comments by including any pertinent information presented by the employee during the conference; i.e., additional needed resources, training, coaching and/or work modifications; goals and objectives presented by the employee that impact specific wording used in writing the evaluation form, etc.
2. The employee is given a copy of the completed evaluation form and its additional pages (if applicable) to review.
3. The employee’s signature on the original acknowledges receipt of the performance evaluation and that an evaluation conference took place.
4. The employee is reminded that he/she may submit any written comments regarding statements made on the evaluation form and/or issues presented during the conference. Employee comments must be received by the manager within ten (10) working days of the conference, and will be included as part of the permanent document forwarded to the Office of Human Resources for inclusion in the personnel file. Written comments that are forwarded to the Human Resources office will be copied for the manager’s information and then placed in the personnel file.
5. Following ten working days, the completed and signed performance evaluation form (with attached pages) is forwarded to the Office of Human Resources, along with any written response submitted by the employee. Both documents will be reviewed in Human Resources and the manager will be contacted to discuss any required follow-up and timelines. If the employee’s comments are not received within the ten days, the completed form is forwarded to the Office of Human Resources for inclusion in the personnel file.