

# Manager's Performance Evaluation

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Presented by:

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June 12, 2013

# Manager's Performance Evaluation

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## Introduction

### Who:

All employees holding a manager/ administrative appointment will be evaluated by their immediate supervisor utilizing the new Evaluation Performance instrument.

### When:

Evaluations will be completed on an academic year basis. Annual evaluations must be submitted to Human Resources no later than:

***May 20***

# Manager's Performance Evaluation

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## *Purpose*

- ✓ The purpose of the Management Performance Evaluation is to demonstrate commitment to organizational excellence and align performance with the District-wide Strategic Goals and Institutional Objectives. This process is designed to assist with improvement of individual performance, thereby increasing institutional effectiveness. The performance evaluation recognizes achievements, establishes training needs, including suggested areas for improvement, and encourages professional development.

# Manager's Performance Evaluation

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## EVALUATION FORMS

- ✓ Form 1 - Position Responsibilities
- ✓ Form 2 - Annual Goals and Objectives
- ✓ Form 3 - Core Leadership Competencies
- ✓ Form 4 - Management Evaluation - Overall Rating
- ✓ Form 5 - Employee's Signature Page Acknowledging Receipt of Evaluation
- ✓ Form 6 – Supervisor's Recommendation & Signature Page
- ✓ Form 7 - Management Self-Evaluation
- ✓ Form 8 - Peer/Staff Evaluation Feedback
- ✓ Form 9 - Management Evaluation Timeline



# Core Leadership Competencies

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- A. Collaboration
- B. Accountability
- C. Communication
- D. Integrity
- E. Stewardship
- F. Job knowledge ( refer to job description on the Human Resources' website)
- G. Innovation

# Rating

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□ ***NI - “Needs Improvement”***

This individual rarely or never demonstrates the competencies for this category or requires frequent direction/supervision.

*Note: If an area is identified that needs improvement in a competency, a written plan for correction referred to as the Performance Improvement Plan should be established, including timelines for improvement and training or other resources, as necessary. Failure to improve within the established timelines may result in further action, up to and including recommendation to not re-employ after expiration of contract.*

# Rating

## *Continued*

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□ ***D - “Developing”***

This individual is learning and developing new skills or may be new to the job/function and is moving in a positive direction toward demonstrating the competencies for this category.

□ ***M - “Meets Standard”***

This individual consistently demonstrates the competencies for this category. The individual demonstrates the expected behavior in most situations.

# Rating

## *Continued*

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□ ***E - “Exceeds Standard”***

This individual consistently demonstrates excellence in the competencies for this category. The individual can be depended upon to demonstrate the expected behavior under *all reasonable* circumstances. The individual’s job achievements have added *significant* value to the goals of their team, department, and/or college.

□ ***NA/O – “Not Applicable or Observable”***

This rating is given when the rating factor does not apply or when job performance has not been observed.

Peralta Community College District  
Management Performance Evaluation  
POSITION RESPONSIBILITIES (Form #1)

Supervisor/Manager: \_\_\_\_\_

Employee: \_\_\_\_\_ Job Title: \_\_\_\_\_ Location: \_\_\_\_\_

Evaluation Period: From: \_\_\_\_\_ To: \_\_\_\_\_

Appointment: Contract begin date: \_\_\_\_\_ Contract end date: \_\_\_\_\_

*Performance Evaluation Key:*

**NI:** Needs Improvement

**D:** Developing

**MS:** Meets Standard

**ES:** Exceeds Standard

**NA/O:** Not Applicable/Observed

*Implementation*

*Review*

LIST 4-7 MAJOR POSITION RESPONSIBILITIES	SUPERVISOR'S COMMENTS
1.	

# POSITION RESPONSIBILITIES (Form #1)

*Continued*

LIST 4-7 MAJOR POSITION RESPONSIBILITIES	SUPERVISOR'S COMMENTS
2.	
3.	
4.	
5.	
6.	
7	
	Position Responsibility Rating: 9



## Manager's Performance Evaluation

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- **Annual Evaluations:**
  - All managers will be evaluated annually.
  - All managers will establish annual professional goals, which align with the District-wide institutional goals and link/crosswalk between District office and college goals.

# Manager's Performance Evaluation

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## □ **Evaluation review:**

- Self-evaluation
- Supervisor's evaluation
- Refer to previous year's evaluation
- Assess previous year's goals and objectives
- Establish goals and objectives for coming year
- Supervisor shares expectations

# Manager's Performance Evaluation

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- **Comprehensive Evaluation – Every three (3) years, a comprehensive evaluation will be conducted to include:**
  - Peer/Staff Feedback
  - Supervisor's evaluation
  - Refer to previous year's evaluation
  - Assess previous year's goals and objectives
  - Establish goals and objectives for coming year
  - Supervisor shares expectations

# Manager's Performance Evaluation New Hires / New Positions Timeline

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- **New Hires/New Positions:**
  - **Establish performance goals and objectives within 60 days** – Within the first 60 days of employment, manager will meet with the supervisor to discuss expectations and the framework for the establishment of goals and objectives which are to be aligned with the District's Strategic Goals and Institutional Outcomes. Within 90 days of employment, each new manager, in consultation with his/her supervisor, shall establish performance goals appropriate for entering his or her new position. The new manager and his/her supervisor will meet, discuss, and finalize the goals.



Manager's Performance Evaluation  
New Hires/New Positions  
*Continued*

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- **Six-month performance review** – At the end of six months, the new manager and supervisor will meet to discuss progress. Any written comments shall provide encouragement and/or direction as appropriate.

# Manager's Performance Evaluation All Other Managers' Timeline

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## □ **All Other Managers:**

- June 14, 2013 – June 25, 2013 - Conduct conference with employee identified as needing “Performance Improvement Plan” to begin discussion regarding performance concerns.
- July 1, 2013 - Performance evaluation process begins.
- July 29, 2013 (no later) - Manager provides employees identified as needing improvement, with a Performance Improvement Plan.



## Manager's Performance Evaluation All Other Managers *Continued*

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- July 1, 2013 – August 1, 2013 - Manager and employee conduct initial conference to establish goals and objectives.
- August 2013 – Manager goals and objectives amended to be aligned with District's Strategic Goals and Institutional Outcomes reviewed and discussed at PBIM Summit.
- January 2, 2014 - Performance period ends for employees who received a “Performance Improvement Plan.”



Manager's Performance Evaluation  
All Other Managers  
*Continued*

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- January 24, 2014 - Progress Report for employees on Performance Improvement Plan due to Human Resources with recommendation for retention, non-retention, or conditional retention.
- February 2014 (Second Board Meeting) - Recommendations by the Chancellor for issuance of March 15th Notice if applicable.
- May 1, 2014 - Employee submits self-assessment to supervising manager.



## Manager's Performance Evaluation All Other Managers *Continued*

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- May 5, 2014 – May 16, 2014 - Summary conference conducted with supervisor and employee. Supervisor and employee will discuss self-evaluation by manager, supervisor's evaluation, previous year's evaluation, assessment of previous year's goals, establishment of goals for the coming year, and supervisor's expectations.
- May 20, 2014 (no later) - Supervisor will submit all evaluations to Human Resources.



Manager's Performance Evaluation  
All Other Managers  
*Continued*

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- June 2014 (First Board Meeting) -  
Recommendations by the Chancellor for contract  
extension.

# Manager's Performance Evaluation

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## □ *Implementation*

Immediate Supervisor/Evaluator and Manager/Evaluatee Meet (Refer to the Management Evaluation Timeline)

- Review District and College goals.
- Develop annual Manager goals and related objectives.
- Review job description and identify current major responsibilities.
- Review each Core Leadership Competency area.



# **Manager's Performance Evaluation**

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## **Five Easy Steps!**

- 1. Manager's notification**
- 2. Initial meeting**
- 3. Supervisor (evaluator) preparation**
- 4. Final meeting**
- 5. Evaluation documents sent to Human Resources**

# Step One

## Manager Notification

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1. Supervisor schedules initial meeting.
2. Manager receives employee performance evaluation packet containing:
  - Performance evaluation procedures
  - Performance Standards
  - Manager Self-Assessment
  - Supervisor's Evaluation
  - Peer/Staff feedback ( 3<sup>rd</sup> year comprehensive evaluation period only)
  - District's Strategic Goal and Institutional Outcomes goals

# Step Two

## Initial Performance Evaluation Meeting

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### **Initial meeting agenda:**

Supervisor explains the process.

1. Supervisor provides an overview of the District-wide and college/department goals.
2. Supervisor charges manager with the task of developing goals and objectives plan that align with District goals and college and/or department goals for upcoming year.
3. Supervisor and manager collaboratively discuss options for developing the manager's annual goals and objectives.

# Step Three

## Supervisor Final Meeting Preparations

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1. Supervisor receives, reviews and (if needed) revises 1<sup>st</sup> draft of manager goals and objectives plan.
2. Supervisor completes the performance evaluation for previous year.
  - Evaluation of manager's previous year's goals and objectives plan
  - Manager's goals and objectives plan for upcoming year
3. Supervisor schedules manager's final performance evaluation meeting.



# Step Four

## Final Performance Evaluation Meeting

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- 1. Supervisor and manager finalize manager's goals and objectives for next year.**
- 2. Supervisor reviews/discusses manager's performance evaluation for previous year.**
- 3. Manager has opportunity to respond and/or comment in writing within 10 days.**
- 4. Supervisor and manager sign off on documents.**

## Step Five

### Final Performance Evaluation to HR

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- ✓ Signed final performance evaluation documents are submitted to Human Resources **no later than...**

May 20