

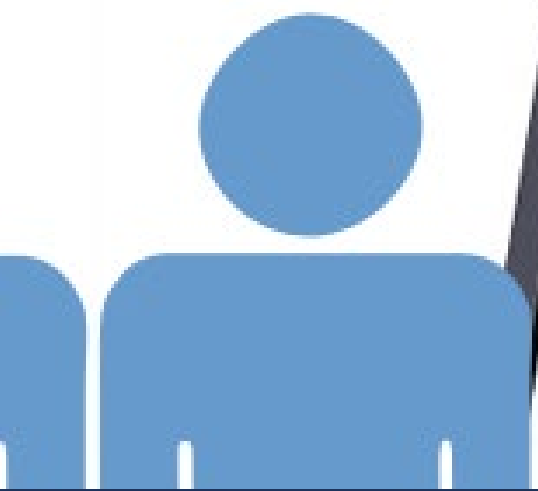
The background of the slide features a close-up, slightly blurred image of the official seal of the San Diego County Sheriff's Department. The seal is circular and contains a central figure of a grizzly bear. The text "SAN DIEGO COUNTY SHERIFF'S DEPT." is inscribed around the perimeter of the seal. The overall color palette is dominated by blues and greys, with a white text overlay in the top right corner.

PERFORMANCE MANAGEMENT

Maria-Elena Davidson



PERFORMANCE MANAGEMENT



Is the way organizations engage with their employees to evaluate their efforts and contribution to the Sheriff's Department. It's a way of assessing strengths and identifying any weaknesses- but more importantly, finding ways to work on these areas to allow employees to grow and develop.

Objectives

- Probationary Period
- Employee Performance Evaluations
- Addressing Performance
- Performance Improvement Plan



The Probationary period is a key step in determining whether a new employee can do the job or not.

As a supervisor it's your job to TRAIN, PREPARE and EVALUATE a probationary employee.

Probationary Period

Probationary Period

Training

- Increases productivity
- Increases employee confidence
- Improves their job skills to become effective in the workplace

Prepare

- Providing tools to complete their job
- set SMART goals and strive to achieve them

Evaluate

Work Quality

- One on One
- Monthly Review
- Mid Probation
- Final Probation



Did the employee pass Probation? YES or NO



Non-Retention Process

Were job expectations provided to the employee?

Was proper training provided to the employee?

Were monthlies completed on time?

Was feedback provided to employee?

Were all required training completed on time?

Did you as a supervisor provide all resources and tools to complete the job requirement?

Did you do enough for employee to succeed?



Non-Retention Process

What's Next?

Who do you call/inform?

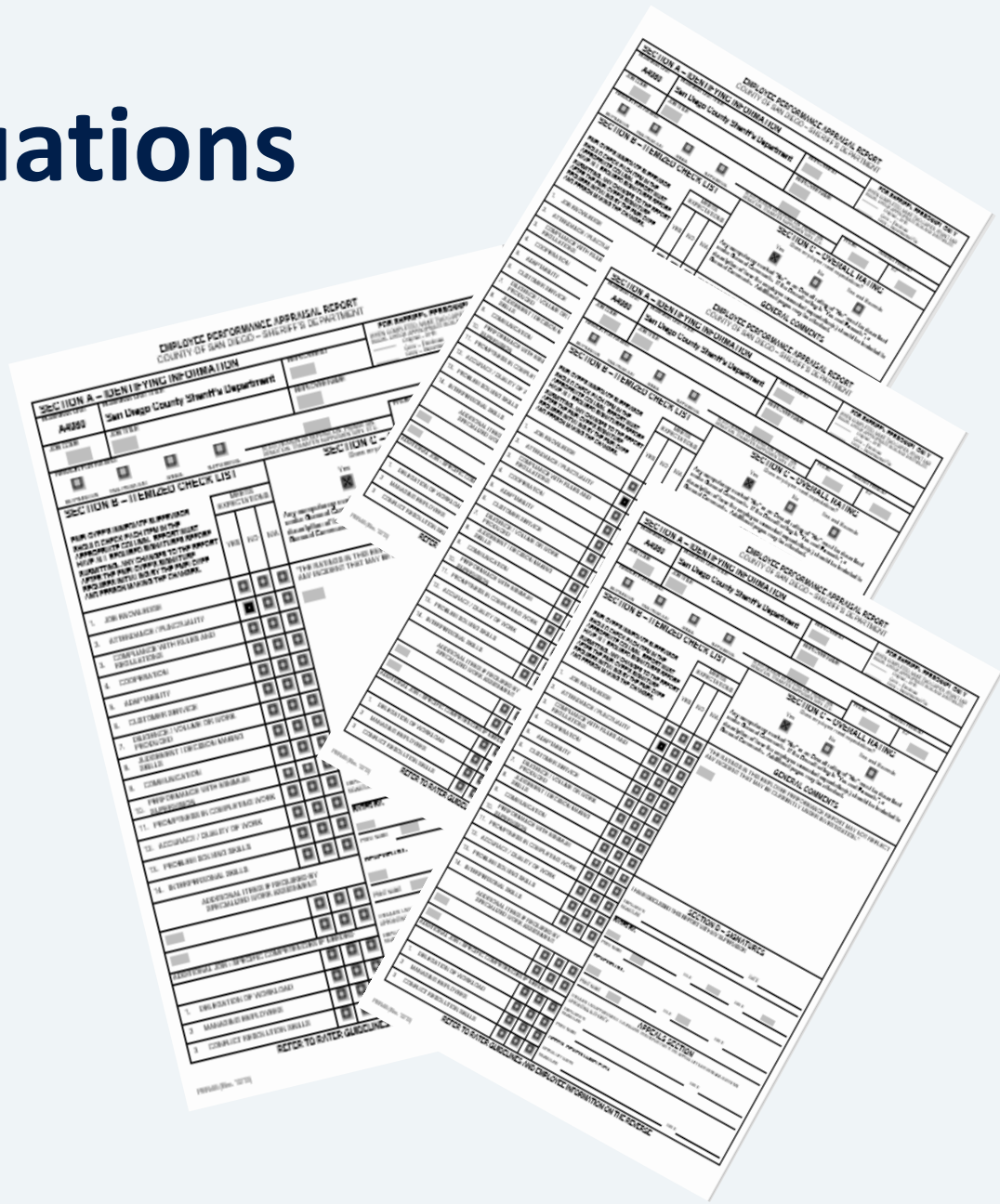
What documents are required to move forward?



Employee Performance Evaluations

The purpose of the Employee Performance Evaluation is to make sure that employees are meeting the standard set forth for the position they were hired for.

In order to manage performance an employee must know what is expected of them in their position.



Measure Performance to a Rating Factor

- Job Knowledge
- Attendance
- Customer Service
- Communication
- Accuracy/Quality of work

EMPLOYEE PERFORMANCE APPRAISAL REPORT
COUNTY OF SAN DIEGO – SHERIFF'S DEPARTMENT

SECTION A – IDENTIFYING INFORMATION				FOR SHERIFF'S PERSONNEL ONLY WHEN COMPLETED, MAKE TWO COPIES (FRONT AND BACK), CHECK APPROPRIATE BOX AND DISTRIBUTE: Original – DPR Copy – Employee Copy – Department File	
BUSINESS UNIT A4980	BUSINESS UNIT TITLE San Diego County Sheriff's Department	EMPLOYEE ID []			
JOB CODE []	JOB TITLE []	EMPLOYEE NAME []			
REASON FOR RATING <input type="checkbox"/> NO PROMOTION <input type="checkbox"/> SPECIAL PROMOTION <input type="checkbox"/> RETIRED <input type="checkbox"/> SUPERSEDDED		STATE REASON(S) SEPARATION, PROMOTION, DEMOTION, TRANSFER, SUPPLEMENTARY, ETC. []			
		RATING PERIOD FROM [] TO []			
SECTION B – ITEMIZED CHECK LIST			SECTION C – OVERALL RATING		
EMPLOYEE'S IMMEDIATE SUPERVISOR SHOULD CHECK EACH ITEM IN THE APPROPRIATE COLUMN. REPORT MUST HAVE ALL REQUIRED SIGNATURES BEFORE SUBMITTING. ANY CHANGES TO THE REPORT AFTER THE EMPLOYEE'S SIGNATURE REQUIRE INITIALING BY THE EMPLOYEE AND PERSON MAKING THE CHANGE(S).			Does employee meet expectations? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes and Exceeds		
			Any competency marked "No" or an Overall rating of "No" must be described under General Comments. If the Overall rating is "Yes and Exceeds", a description of how the employee exceeded expectation(s) should be included in General Comments. Additional pages may be attached.		
			GENERAL COMMENTS		
			THE RATINGS IN THIS EMPLOYEE PERFORMANCE REPORT MAY NOT REFLECT ANY INCIDENT THAT MAY BE CURRENTLY UNDER INVESTIGATION.		
1. JOB KNOWLEDGE			MEETS EXPECTATIONS		
			YES NO N/A		
2. ATTENDANCE / PUNCTUALITY			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. COMPLIANCE WITH RULES AND REGULATIONS			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. COOPERATION			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. ADAPTABILITY			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. CUSTOMER SERVICE			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. DILIGENCE / VOLUME OR WORK PRODUCED			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. JUDGEMENT / DECISION MAKING SKILLS			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. COMMUNICATION			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. PERFORMANCE WITH MINIMUM SUPERVISION			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. PROMPTNESS IN COMPLETING WORK			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. ACCURACY / QUALITY OF WORK			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
13. PROBLEM SOLVING SKILLS			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
14. INTERPERSONAL SKILLS			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADDITIONAL ITEMS IF REQUIRED BY SPECIALIZED WORK ASSIGNMENT					
[]			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
[]			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
ADDITIONAL JOB - SPECIFIC COMPETENCIES IF NEEDED					
1. DELEGATION OF WORKLOAD			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. MANAGING EMPLOYEES			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. CONFLICT RESOLUTION SKILLS			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			SECTION D – SIGNATURES		
			I HAVE DISCUSSED THIS REPORT WITH MY SUPERVISOR		
			EMPLOYEE'S SIGNATURE _____ DATE _____		
			RATED BY: _____ DATE _____		
			TITLE _____ DATE _____		
			REVIEWED BY: _____ DATE _____		
			TITLE _____ DATE _____		
			APPEAL'S SECTION		
			I REQUEST AN APPOINTMENT TO DISCUSS THIS RATING WITH THE APPEAL OFFICER DESIGNATED BY APPOINTING AUTHORITY		
			EMPLOYEE'S SIGNATURE _____ DATE _____		
			APPEAL REVIEW COMPLETED		
			APPEAL OFFICER'S SIGNATURE _____ DATE _____		

REFER TO RATER GUIDELINES AND EMPLOYEE INFORMATION ON THE REVERSE

Type of Employee Performance Evaluation

Monthly Review

Mid Probation

Final Probation

Annual Evaluation

Supplemental Evaluation

Timelines

Supervisors receives 45 days in advance

Supervisor must issue within 30 calendar days

after end of rating period

Employee has 5 calendar days to review & sign

EMPLOYEE PERFORMANCE APPRAISAL REPORT
COUNTY OF SAN DIEGO - SHERIFF'S DEPARTMENT

SECTION A - IDENTIFYING INFORMATION

FOR EMPLOYER, SUPERVISOR ONLY
THIS REPORT IS TO BE COMPLETED BY THE SUPERVISOR AND NOT THE EMPLOYEE.

SECTION B - ITEMIZED CHECK LIST

SECTION C - OVERALL RATING

SECTION D - SIGNATURES

APPEALS SECTION

REFER TO RATER GUIDELINES AND EMPLOYEE INFORMATION ON THE REVERSE

FORM 060 (Rev. 10/13)

Guidelines

- Know when the evaluation is due
- Gather all documentation
 - Station file
 - Log Events/MODs
 - Emails/Kudos
- Solicit input from employee
- Review assignments, achievements, and/or trainings taken
- Review status of previous goals
 - Were they met?
 - Were they not met?



What if employee has an IA /Leave of Absence

- **Employee has a current IA investigation**

The appraisal should not address any IA information

- **Employee had a sustained IA investigation**

Supervisor can indicate:

“Employee had a sustained IA for Policy Section XX and receive a..... On DATE”

- **Employee is on a leave of absence**

Supervisor can indicate:

“Employee was on approved leave of absence from DATE to DATE”

- **Employee is on limited duty**

Supervisor can indicate:

“Employee was on approved limited duty from DATE to DATE. While on limited duty they performed....”

What IF the Employee...





Addressing Performance

Consider taking these steps to manage poor performance within your team:

- Establish the issue
- Address the issue immediately
- Document the process
- Ask questions
- Encourage accountability
- Recognize the person's strengths
- Provide honest feedback





Addressing Performance

- Stick to the facts and underline expectations
- Emphasize behavior
- Align records of past performance
- Describe proof of misconduct
- Identify and present consequences





Performance Improvement Plans (PIP)

- The PIP is not appropriate when department or agency rules have been violated that warrant immediate corrective action.
- The PIP is not appropriate as an alternative to the accommodation of disability-related work restrictions.
- The PIP is not appropriate when an issue only occurs sporadically.
- The PIP is not appropriate for most attendance issues.





Performance Improvement Plans (PIP)

Cite the standards and how the employee failed to meet them.

State how the employee can improve performance. Specific expectations and how the employee can attain them must be included.

Supervisory Guidance and Assistance is essential.

One on One weekly/bi-weekly meetings

Time Frames and Consequences: Critical benchmarks must be included in writing. The beginning of the PIP, when the supervisor will meet with employee and length of PIP (30,60,90 days)

Performance Management Goal

Employee - knows exactly where he or she stands in relation to achieving goals and reaching performance milestones that contribute to career development, promotions and more.

Supervisor - gains insights into the motivations of the people working for him/her through the required conversations.

Department - retains motivated employees who understand their role and the roles of others in contributing to the overall success of the organization.