PERFORMANCE MANAGEMENT

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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 weaknessesbut more importantly, finding ways to work on these areas to allow employees to grow and develop.

Objectives

Probationary Period
Employee Performance Review
Performance Improvement Plan
Grievance

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 <u>TRAIN, PREPARE and EVALUATE</u> a probationary employee. Period

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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

- Monthly Appraisals
- Mid Probation
- Final Probation

Probationary Extensions

Only the Final Probationary review is extended.

- FML or Limited Duty
- Employees with 6th month Probationary Period

Contact:

- Sworn: Career Path Sgt.
- Professional Staff: DHRO



Did the employee pass Probation? YES OF NO

Non-Retention/Failure on Probation

- Significant Unresolved Performance Issues
- Multiple Discussion with Employee
- Documentation
 - What documents are required to move forward?
- What is the process?
- Discuss with Command /Employee Relations

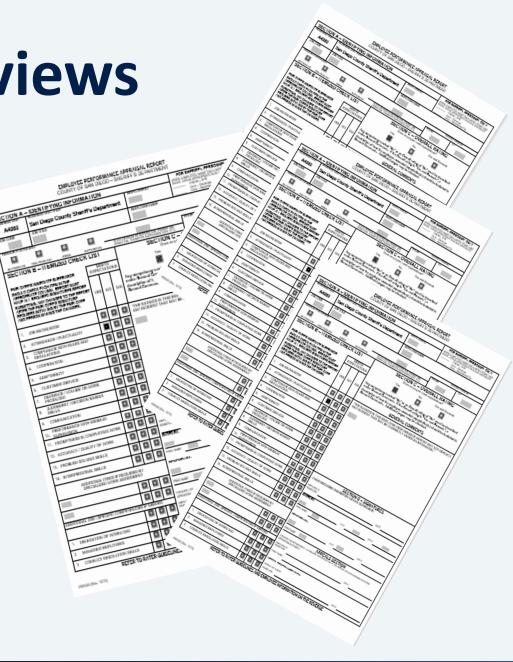
Non-Retention Review

Were job expectations provided to the employee? Was proper training provided to the employee? Were monthlies completed on time? Was consistent feedback provided to employee? Were all required training completed on time?

Did you as a supervisor provide the employee all resources and tools to complete the job requirement? Did you do enough for employee to succeed?

Employee Performance Reviews

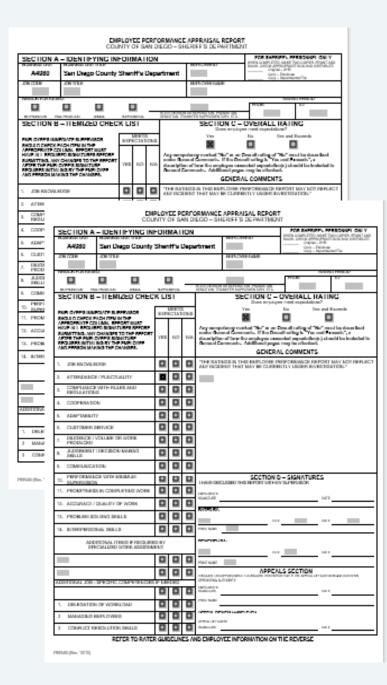
- The purpose of the Employee Performance Review is to make sure that employees are meeting the standard set forth for the position they were hired for.
- In order to manage performance an employee must know what is expected of them in their position.



Measure Performance to a Rating Factor

- Job Knowledge
- Attendance
 - Sick Leave Abuse
- Customer Service
 - Courtesy
- Communication
- Accuracy/Quality of work

				ORMANCE APPRAISAL REPORT DIEGO – SHERIFF'S DEPARTMENT
SECTION A - IDENTIFYING IN	FOR	MAT	ION	FOR SHERIFF'S PERSONNEL ONLY WHIN COMPLETED MARE TWO COMES PRONT AND
A4980 San Diego County	Sher	iff's	Depa	BMPLOYEE D BACK, CHECK APPROPRIATE BOX AND DETRIBUTE: Original - DHR
JOB CODE JOB TITLE				EMPLOYEE NAME
REASON FOR RATING		_		RATING PERIOD
			_	STATE REASONAS SERVICITOR INCOMPTON DEMOTION, TRAVAULTER LIPPLINESDAYS, ESC.
SECTION B – ITEMIZED CHEC		242/14		SECTION C - OVERALL RATING
SECTION D - TEMIZED CHEC				Does employee meet expectations?
EMPLOYEE'S IMMEDIATE SUPERVISOR		MEETS		Yes No Yes and Exceeds
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 REQUIRES INITIALING BY THE EMPLOYEE AND PERSON MARING THE CHANGES.	YES	NO	NA	Any competency marked "No" or an Overall rating of "No" must be described under General Comments. If the Overall rating is "Yes and Ecoseds", a description of how the employee exceeded expectation(s) should be included in General Comments. Additional pages may be attached.
1. JOB KNOWLEDGE				GENERAL COMMENTS "THE RATINGS IN THIS EMPLOYEE PERFORMANCE REPORT MAY NOT REFLECT ANY INCIDENT THAT MAY BE CURRENTLY UNDER INVESTIGATION."
2. ATTENDANCE / PUNCTUALITY				
COMPLIANCE WITH PLLES AND	-	믐	H	—
REGULATIONS COOPERATION	븜	븜	븜	
	븝	븓	븓	
5. ADAPTABILITY				
6. CUSTOMER SERVICE				
7. DILIGENCE / VOLUME OR WORK PRODUCED				
8. SKULS				
9. COMMUNICATION				
10. PERFORMANCE WITH MINIMUM SUPERVISION				SECTION D – SIGNATURES
11. PROMPTNESS IN COMPLETING WORK				SMR.OTSES
12. ACCURACY / QUALITY OF WORK				GATE
13. PROBLEM SOLVING SKILLS				TILE ONE
14. INTERPERSONAL SKILLS				PERCENT
ADDITIONAL ITEMS IF REQUIRE SPECIALIZED WORK ASSIGNM				NEVENED BY:
				2 KN7 NAVYS
				APPEALS SECTION I REQUEST AN APPONTMENT TO DECUES THE REPORT WITH THE APPEAL OFFICER DESIGNATED BY MY
ADDITIONAL JOB - SPECIFIC COMPETENCIES	IF NE	CDED		APPOINTING AUTHORITY DWALDYEE'S
				SOME OF CONTRACTOR
1. DELEGATION OF WORKLOAD				PENTINAN
2 MANAGING EMPLOYEES				APPEAL REVIEW COMPLETED APPEAL OFFICERS
3 CONFLICT RESOLUTION SKILLS				



Type of Employee Performance Reviews

- 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

Guidelines

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

Tips: Writing the Draft

No Suprises to the employee

Evaluate for the entire rating period

Be sure that any "Need Improvement" categories were:

- Discussed with employee
- Documentation justifies the "Need Improvement"

Rate appropriately

DO NOT

- Do not add your personal opinion
- Do not add medical information



What if employee has an IA /LOA



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...."

Employee is on temporary assignment

duty

Supervisor can indicate:

• "Employee was on a Temporary Assignment Duty from DATE to DATE. While on Temporary Assignment Duty they performed...."

What IF the Employee...



What is the purpose of a performance improvement plan?

It is an effort to bring an employee's work performance to a standard level.

When a chronic work habit or an ongoing performance problem is observed or identified and attempts at remedying the problem by either oral or written communication from the supervisor have not been successful, a PIP would be appropriate.

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 disabilityrelated 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.

Grievance

An allegation by an employee or a group of employees that the County has failed to provide a condition of employment which is established by Memorandum of Agreement or by a Departmental Policy or Procedure Manual



Informal Grievance

- Employee shall discuss issue with supervisor
- Parties shall attempt to reach satisfactory solution

Formal Grievance

- Written Form served upon supervisor
- Ensure it's a grievable issue
- Supervisor review and provide written response TIMELY

COUNTY OF SAN DIEGO	
G	RIEVANCE FORM
grievances as quickly as possible withou employee or management representative filling out this form, consult the grievanc	s to provide a just and equitable method for the resolution of t discrimination, coercion, restraint or reprisal against any who maybe involved in a grievance or its resolution. Before e procedure provisions applicable to your bargaining unit
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Grievances – Formal Procedure

- Employee writes the grievance to immediate supervisor within 14-WORKING days.
- Supervisor has 7-WORKING days after receipt of the written grievance in which to review and answer the grievance in writing after receipt.

SEIU

- Employee writes the grievance to immediate supervisor within 10-CALENDAR days.
- Supervisor has 10-CALENDAR days after receipt of the written grievance in which to review and answer the grievance in writing after receipt.

TEAMSTERS

- Employee writes grievance to immediate supervisor within 7-WORKING days.
- Supervisor has 7-WORKING days after receipt of the written grievance in which to review and answer the grievance in writing after receipt.

ways partner with Employee Relations*

Grievances – Formal Procedure



DSA

If the grievance is not resolved at this level, the employee shall have seven 7-WORKING days from receipt of the supervisor's answer within which to file an appeal to the next level.

SEIU

If the grievance is not resolved at this level, the employee shall have ten 10-CALENDAR days from receipt of the supervisor's answer within which to file an appeal to the next level.

TEAMSTERS

If the grievance is not resolved at this level, the employee shall have seven 7-WORKING days from receipt of the supervisor's answer within which to file an appeal to the next level.