

Performance Evaluations

Best Practices and Touch Points

- 1) Evaluation Cycle Start dates and must be adhered to. CSEA & PEF- on anniversary date in salary grade; MC is April 1st. Issuance of Performance Program must be done timely. It must be completed and given to the employee at the beginning of the rating period. If possible, engage employees in jointly developing plans to build their strengths and improve job performance. Employee signs it.
- 2) Preparation by Employee of Parts I and II Worksheet: PEF employee must be offered the opportunity to complete Parts I and II (Part II if Part I is completed).
- 3) Write clear Job Tasks and corresponding Performance Standards.
Job Tasks - each responsibility should be broken down into the tasks the employee must do to meet that responsibility. Task statements should be concise groupings of daily activities that together give a clear picture of the job. Tasks should support work unit and agency goals and objectives. Tasks should be consistent with an up-to-date job description. Rank the tasks in descending order of importance on the Performance Program. Modify the tasks so that the final statements are clear, complete, specific, and behavioral.

Performance Standards are written descriptions of “*how well*” you expect the work to be performed. Provide a clear picture about the quality of the work that is expected. Be Specific, Measurable, Attainable, Relevant and time-bound.
- 4) Assess employee performance in objective behavioral terms, which are actions a person takes or does not take. They are observable and measurable. They can be described, recorded, and discussed objectively. They are NOT *perceptions, opinions, attitudes and traits*.
- 5) Provide ongoing feedback and dialogue regarding performance period using two-way communication. Conduct effective appraisal meetings throughout the year. Make sure the employee is told in writing if they are heading for an unsatisfactory rating. Tell them early and often. Use counseling memos to help validate what was told to the employee.
- 6) Supervisors should keep records of the employee performance that they have observed. Also feedback from customers – thank you letters as well as complaints, samples of work output, time and attendance records, congratulatory letters, memos, training certificates, reports for which the employee was responsible, copies of counseling memos, and supervisor’s notes of meetings/agreements with the employee.

- 7) Six month recertification must be done timely for PEF and it is highly recommended for CSEA and MC employees. If an employee is heading towards an unsatisfactory rating, the supervisor should give an unsatisfactory rating at the six month period. Usually if the employee is not rated unsatisfactory at the midpoint and receives an unsatisfactory at the end of the evaluation period and the evaluation is appealed, an arbitrator will overturn the unsatisfactory rating at the end saying employee had no idea they were doing unsat work.
- 8) Due Date of Performance Evaluation Rating (appraisal) must be timely. It must be completed annually on performance evaluation anniversary date and given to the employee as soon as practical. The appraisal consists of the following: 1) the supervisor's written assessment with a recommended rating; 2) the meeting with the employee to discuss and formally provide this feedback; 3) supervisor's signature supporting recommendation; 4) reviewer's signature in approval of recommended rating.
- 9) Only ratings of unsatisfactory are appealable.
- 10) A performance advance (increment) or longevity payment will be withheld if rated unsatisfactory.

This information above is not complete. Please consult the Performance Evaluation Administrator Manual on the ER Toolkit for more specific information. Also view the PE training materials on the ER Toolkit for suggestions on writing appraisals.

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