

The Performance Management Program is designed to encourage employees to contribute to work results through cooperative endeavors, continuous learning and purposeful action in meeting client/customer needs.

Performance Management Program Educational Guide

Plans & Appraisals

Pima County Human Resources, rev. 8.3.2017

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CHAPTER I: PURPOSE AND APPLICABILITY

The Performance Management Program is designed to encourage employees to contribute to work results through cooperative endeavors, continuous learning and purposeful action in meeting client/customer needs. The program is comprised of three elements:

- Performance Plan
- Progress Review Discussion(s)
- Performance Appraisal

Instructions set forth in this guide align with and supplement MSR 15 to provide consistency in approach throughout the organization and flexibility within departments to tailor employee performance criteria to best reflect mission-specific goals and objectives.

Employees with employment type Regular Classified or Trainee are covered under this Performance Management Program. Unclassified, Temporary, and Intermittent employees, to include Adult Work Experience Program Workers, Law Clerks, and Youth Workers, are not appraised using this program.

CHAPTER II: GENERAL DEFINITIONS

Performance Management Cycle: The timeframe a Performance Plan covers, during which an employee's performance is either directly observed or verified for the purpose of completing a performance appraisal. The duration of a cycle may vary depending upon the type and scope of appraisal. **The timely completion, administration, and distribution of Performance Appraisals are required.**

Performance Plan: An individualized written document citing expectations and other job-related goals and objectives to be accomplished during the Performance Management Cycle.

Performance Appraisal: An individualized document rating and summarizing the Employee's performance during the Performance Management Cycle, based on expectations, goals and objectives set forth in the Performance Plan.

It is imperative that the appraisal encompass the Employee's performance during the *entire* cycle, not just recent or specific events.

Performance Dimension: A critical work assignment, responsibility or result to be achieved that is of such importance that any performance level below a successful rating would require improvement.

Standard: A written description of a performance dimension requirement or expectation used as a measure of successful performance.

Narratives: Brief explanations written in support of performance ratings.

CHAPTER III: ROLES AND RESPONSIBILITIES

Employee: An employee with employment type Regular Classified or Trainee and covered by this Performance Management Program. The Employee:

1. Participates in the Performance Plan meeting with the Rater to review and acknowledge performance expectations; requests clarification when needed.
2. Participates in Progress Review Discussions with the Rater.
3. Participates in the Performance Appraisal meeting with the Rater.

Rater: A supervisor or manager in the Employee's chain-of-command with knowledge of his/her performance through direct observation or appropriate verification. The Rater is typically the Employee's direct supervisor. The Rater:

1. Prepares a Performance Plan and submits it to the Reviewer for review and *verbal* approval prior to issuance.
2. Meets with the Employee at the beginning of the cycle to review and discuss the Performance Plan.
3. Monitors the Employee's performance throughout the cycle and ensures employee performance records are maintained for evaluation purposes.
4. Initiates Progress Review Discussion(s) during the cycle and assists the Employee with improving aspects of his or her performance.
5. Prepares the Performance Appraisal for the Employee in accordance with required timelines, incorporating feedback from appropriate sources. If applicable, acknowledges successful performance and identifies areas requiring improvement, when necessary.
6. Submits the appraisal to the Reviewer for review and *verbal* approval prior to meeting with the Employee.
7. Meets with the Employee to review and discuss the appraisal covering the previous cycle and the new Performance Plan (see item 1. above) for the next cycle.
8. Holds the appraisal and plan until the Employee's appraisal response period of five calendar days has elapsed, then submits both documents to the Reviewer for final signatures.
9. Ensures the Employee's plan and appraisal are correctly routed for final processing and filing.

Reviewer: A Designee with the authority to approve Performance Plans and Performance Appraisals for his or her functional area(s) of responsibility. The Reviewer:

1. Reviews and *verbally* approves Performance Plans and Performance Appraisals for covered employees to ensure job relatedness and consistency with individual, team or organizational goals and objectives prior to issuance.
2. Resolves disputes between the Rater and the Employee regarding Performance Appraisal ratings and/or narratives or Performance Plan content.
3. Reviews the final Performance Appraisal and Performance Plan after issuance to the Employee and provides final signatures.

Appointing Authority: An Elected Official or Department Director designated by the County Administrator to take official personnel actions in accordance with Merit System Rules and Personnel Policies. The Appointing Authority:

1. Ensures the Performance Management Program, as administered within the department, conforms to the County's educational guidelines.
2. Ensures employees are informed of program guidelines as well as their duties and responsibilities in the performance management process.
3. Ensures supervisors and managers attend required countywide Performance Management training on program administration.
4. Ensures Raters and Reviewers comply with the requirements of the program and are provided guidance when developing position-specific dimensions.
5. Provides reconsideration of Performance Appraisal ratings when requested by the Employee.

Human Resources Director:

1. Oversees the creation and implementation of the Performance Management Program.
2. Provides supervisors and managers with required training covering their responsibilities within the Performance Management Program.
3. Ensures relevant training, coaching and technical assistance is provided to departments as needed.
4. Maintains official personnel files, which house employee Performance Appraisals.

CHAPTER IV: PERFORMANCE PLAN

1. GENERAL PROVISIONS

- A. A Performance Plan is required for a newly-hired employee serving initial probation or for an employee commencing any other type of probation. The plan is developed by the Rater, *verbally* approved by the Reviewer and issued during the Employee's first week serving probation.
- B. For an established non-probationary employee, a Performance Plan is developed by the Rater, *verbally* approved by the Reviewer and typically issued during the Employee's anniversary month (immediately following issuance of a Performance Appraisal).
- C. A Covered Employee must work under a Performance Plan for a minimum of 90 calendar days prior to receiving a Performance Appraisal.
- D. A copy of the issued and Reviewer-signed Performance Plan is given to the Employee; the original is maintained in the department personnel file.

(Please do not send a copy of the Performance Plan to Human Resources.)

2. INSTRUCTIONS FOR COMPLETING PART A (PERFORMANCE PLAN)

For Non-Supervisory Employees (Appendix A): The Performance Plan consists of four sections:

- Development Opportunities,
- Performance Improvements,
- Organizational Conduct Dimensions, and
- Customized Performance Dimensions.

For Supervisory Employees (Appendix E): The Performance Plan consists of five sections:

- Development Opportunities,
- Performance Improvements,
- Organizational Conduct Dimensions,
- Customized Performance Dimensions, and
- Leadership Dimensions.

Development Opportunities (Section 1 - optional): The Employee may receive one or more development opportunities commensurate with the needs of the department, service to the public, skill level of the Employee and available funding.

Such opportunities may include classroom or on-the-job training, job enrichment or cross-training opportunities and other self-paced or group activities (e.g., reading books/journals; completing interactive media training; attending conferences).

If no Development Opportunities are assigned to the Employee, indicate "NONE".

Performance Improvements (Section 2 - optional): The Rater may have cited performance areas requiring improvement in the Employee's appraisal for the preceding cycle. If so, the Rater shall include the cited areas as well as expectations for improvement in this section. If there are no performance areas requiring improvement, indicate "NONE".

Organizational Conduct (Section 3 - required): The Employee will be accountable for and appraised on three dimensions that address basic workplace principles and standards.

Customized Performance Dimensions (Section 4 - required): The Employee shall receive a minimum of three, but no more than five, job-related performance dimensions used to evaluate his/her performance during the cycle.

Performance Dimensions from the three categories described below may be used alone or in conjunction to populate this section.

- A. **GENERAL WORKFORCE DIMENSIONS** (Appendix B) are generic in nature and typically describe job-related qualifications used to measure performance (e.g., communications, productivity, initiative).

Items selected from this category must be used as written without modification or substitution.

- B. **POSITION-SPECIFIC DIMENSIONS** (Appendix C) are less generic in nature and tied directly to functional areas of responsibility (e.g., record keeping, training, equipment maintenance).

Developed by the Rater with the Reviewer's *verbal* approval, Position-Specific Dimensions must follow the format illustrated in this appendix. *Technical assistance is recommended and available through the County's HR Training Officer.*

- C. **MANAGEMENT / SUPERVISORY DIMENSIONS** (Appendix D) may only be utilized for supervisors and managers with at least one direct report (for whom they approve time cards and leave requests). The dimensions are tailored to address specific job-related qualifications of supervisors.

As with General Workforce Dimensions, items selected from this list must be used as written without modification or substitution.

Leadership Dimensions (Section 5 – *required for supervisors only*): Supervisory employees will be accountable for and appraised on four dimensions that address fundamental managerial workplace principles and standards.

3. **AMENDMENTS**

The Performance Plan may be amended by the Rater (with *verbal* approval of the Reviewer) at any time during the Performance Management Cycle. Plans are most commonly amended when unforeseen circumstances significantly alter the Employee's job duties or responsibilities.

When new performance dimensions are added or existing Position-Specific Dimensions are modified, the Employee must be provided a copy of the amended plan and the opportunity to work under the revised expectations for at least 90 calendar days prior to being appraised on his/her performance.

4. **PROGRESS REVIEW DISCUSSIONS**

At least one Progress Review Discussion between the Rater and the Employee must be conducted during the cycle; however - it is recommended that the Rater conduct them quarterly.

The purpose of the discussion(s) is to provide the Employee with feedback regarding the status of his or her performance. It also provides an opportunity to review revisions to the Performance Plan.

5. **DISPUTES**

A dispute between the Rater and the Employee regarding the content of the Performance Plan shall be referred to the Reviewer as the final decision-maker. If an employee refuses to sign or discuss the Performance Plan, it shall be so noted on the plan and, if possible, in the presence of a witness.

1. PERFORMANCE MANAGEMENT CYCLE

Annual Performance Appraisals are typically required by the end of the month in which the Employee's anniversary falls unless an adjustment has been made (e.g., to accommodate the minimum 90-day Performance Plan requirement).

Mid-Probation Performance Appraisals are required at the mid-point of the probationary period being served, ***with the exception of promotion probation, which requires an end-of-probation appraisal (in lieu of a mid-probation appraisal).***

Trainee Program Performance Appraisals are required at the mid-point of the training period, which may range from six to 24 months in duration.

Optional Performance Appraisals are permissible with Appointing Authority approval. For example, closeout appraisals may be necessary under certain circumstances, such as when a Rater leaves, or an employee accepts another County position.

2. DOCUMENTS

The Performance Plan provides the foundation upon which the Performance Appraisal is built, therefore plan content auto-populates corresponding fields in the appraisal.

Performance-related documents that may be utilized and/or considered during appraisal preparation include but are not limited to:

- Disciplinary Actions
- Letters of Commendation

3. GENERAL PROVISIONS

- A. The Employee must work under a Performance Plan (or amended Performance Plan) for a minimum of 90 calendar days and, as a result, his/her typical appraisal date may be adjusted to meet this requirement.
- B. The Rater shall consider the Employee's performance during the *entire* cycle, including feedback solicited from appropriate sources (e.g., lead, interim supervisor, previous supervisor).
- C. When the Employee changes positions during the cycle, the Rater for the new position shall prepare the Performance Appraisal provided he/she has observed the Employee's performance for a minimum of 90 calendar days.

A Rater may choose to retain the Performance Plan from the previous position, rather than creating a new one, when it includes performance dimensions applicable to the new position. If so, the Rater for the new position must consult the previous supervisor if he/she is still available to ensure the appraisal encompasses the Employee's performance during the *entire* cycle.

Technical assistance is available through the County's HR Training Officer.

- D. If the Rater is new and has not observed the Employee's performance for a minimum of 90 calendar days, the Rater's supervisor or the Reviewer shall prepare the Performance Appraisal. If that individual normally acts in the capacity of Reviewer, he or she will fulfill both roles in this instance.
- E. All ratings and narratives must receive the Reviewer's *verbal* approval before the Performance Appraisal is discussed with the Employee. If the Rater and Reviewer do not agree, the Reviewer will make the final determination.
- F. The Employee shall be provided with a **copy** of the signed Performance Appraisal; a second **copy** must be placed in the department personnel file. The **original** appraisal shall be sent to Human Resources for inclusion in the Employee's official personnel file.

4. INSTRUCTIONS FOR COMPLETING PART B (PERFORMANCE APPRAISAL)

For Non-Supervisory Employees (Appendix A): The Performance Appraisal contains four performance categories:

- Development Opportunities,
- Performance Improvements,
- Organizational Conduct, and
- Customized Performance Dimensions.

For Supervisory Employees (Appendix E): The Performance Appraisal contains five performance categories:

- Development Opportunities,
- Performance Improvements,
- Organizational Conduct,
- Customized Performance Dimensions, and
- Leadership Dimensions.

- A. **Development Opportunities** (Section 1). The Employee may receive comments, guidance or observations on one or more training and development goals identified in the Performance Plan for the current cycle, if applicable.
- B. **Performance Improvements** (Section 2). The Employee may receive comments, guidance or observations on one or more performance deficiencies identified as requiring improvement in the Performance Plan for the current cycle, if applicable.
- C. **Organizational Conduct** (Section 3). The Employee shall be rated on three standardized performance dimensions listed in this category.
- D. **Customized Performance** (Section 4). The Employee shall be rated on the three to five performance dimensions previously selected for this category.
- E. **Leadership** (Section 5). *Note – this section is found only on appraisals for supervisory employees.* Managers and Supervisors are rated on four standardized leadership dimensions listed in this category.

- F. A four-tier, non-numerical system is utilized to rate performance in the dimensions listed within each performance category:

SURPASSES	Signifies exceptional performance.
SUCCESSFUL	Signifies thoroughly acceptable performance.
INCONSISTENT	Signifies marginal performance.
UNACCEPTABLE	Signifies undesirable performance requiring improvement.

- G. To determine the appropriate rating level for a performance dimension, the Rater shall weigh how well the Employee's performance (during the *entire* cycle) aligns with the standards listed.
- i. Consider that every standard does not have to be met in absolute terms. The overall contribution of the Employee's performance may, in the Rater's judgment (through direct observation or verification), carry greater weight if the desired outcome for that specific performance dimension was achieved.
 - ii. Occasionally, a Rater may determine that the Employee's performance is marginal or inconsistent and more difficult to weigh.

For example, the Employee may have performed well on some standards and below expectations on others.

In such cases, the Rater shall consider how frequently the marginal performance occurred and its impact on the successful achievement of that dimension.

- H. Brief comments or narratives are required for each of the performance categories and must be clearly written, concise, and supported by specific examples.

It is imperative that the Reviewer carefully examine each comment and narrative in the appraisal for relevance and appropriateness before providing verbal approval.

I. Legal Considerations

- i. *Discrimination Laws* (both federal and state) require that all employment actions, including Performance Appraisals, be non-discriminatory.

Language in the appraisal that suggests the performance of an employee is the direct result of that individual's membership in, or affiliation with, a protected group (e.g., race, color, religion, national origin, age, sex, disability, veteran status, sexual orientation, genetic information) or a protected activity (e.g., approved leave of absence) is strictly prohibited.

- ii. *Job Duty Relationship* falls under the Americans with Disabilities Act (ADA), which prohibits an employer from discriminating against a qualified person with a recognized disability who can perform the essential duties of the position with or without accommodation.

No reference to an employee's known or perceived disability shall be included in the Performance Appraisal.

- iii. *Employment-At-Will*, as related to employees serving initial probation or new-hire trainees, signifies that they may be terminated at any time without the right of appeal. Because these employees receive mid-point Performance Appraisals, the Rater shall refrain from making or writing statements that either suggest or imply continued employment.
- iv. *Fair Labor Standards Act (FLSA)* is a set of federal guidelines that governs compensation issues for eligible employees, including overtime pay. Any reference to volunteer work as a means of correcting poor performance is strictly prohibited.
- v. *Defamation* can occur if the language used in the Performance Appraisal includes personal opinions about an individual's beliefs or lifestyle. Written narratives must be job-related, objectively stated and avoid subjective or hearsay comments.

5. PERFORMANCE APPRAISAL DISCUSSION

- A. The Rater shall discuss the *verbally* pre-approved Performance Appraisal with the Employee. Following the discussion, the Rater and the Employee shall sign the appraisal to indicate it was reviewed.

The Employee may elect, if planning to submit a written response, to take up to five calendar days to sign the appraisal (see item V.5.B. below). If the Employee declines to sign, a third party (e.g., a supervisor, the department personnel representative) shall witness the refusal. The Rater shall write "Employee refused to sign" on the employee signature line. Both the Rater and witness shall initial and date the appraisal near the written notation.

- B. The Employee may submit a written response to the appraisal within five calendar days of issuance. The response shall be made either in the space provided on the appraisal or on a separate, single-sided sheet that is legibly typewritten (minimum 10 pt font) or legibly handwritten. When submitted timely, the Employee response shall be attached to the appraisal.

No other attachments are permitted. Comments submitted after five calendar days will not be accepted; therefore, it is advisable to wait until the five calendar-day employee response period has elapsed before proceeding to the next step (V.5.C).

- C. The Rater and Employee-signed Performance Appraisal and Performance Plan (for the next cycle) are submitted to the Reviewer for final review and signatures.

6. RECONSIDERATION

The Employee may request, in writing, a reconsideration of appraisal ratings from the Appointing Authority or Designee within the *same* five calendar days following receipt of the appraisal, as cited in V.5.B above, using his/her written response as justification.

It is strongly recommended that copies of the appraisal and written response be submitted with the request for reconsideration to the Appointing Authority or Designee *at the same time* the written response is submitted to the Rater.

The Appointing Authority provides the Employee with his/her final decision within five calendar days of receipt of the request.

Neither the Performance Plan nor the Performance Appraisal is grievable.

CHAPTER VI: RELATIONSHIP OF PERFORMANCE APPRAISAL TO OTHER PERSONNEL ACTIONS

1. DISCIPLINARY ACTION

The Performance Management Program is not part of the County's disciplinary process and shall not be used as a substitute for it. However, the Rater must not ignore serious disciplinary problems that occurred during the Performance Management Cycle.

Such issues must be documented by identifying the inappropriate performance or conduct that occurred (e.g., failure to wear safety shoes) without referencing the actual discipline taken (e.g., Letter of Reprimand).

2. SPECIAL OBSERVATION PERIOD

The Employee may receive a Performance Appraisal and be placed on a Special Observation Period (SOP) simultaneously. The SOP is a non-disciplinary action that offers an opportunity for the department to closely monitor the Employee's performance, providing guidance and feedback as needed.

An SOP is initiated by issuing the Employee a Notice of Special Observation Period (see Administrative Procedure 23-13), not a Performance Plan. At the end of the SOP the Rater shall complete a Special Observation Period Performance Appraisal (Appendix F) addressing only the Employee's performance in the areas set forth in the Notice of Special Observation Period.

3. RECOGNITION

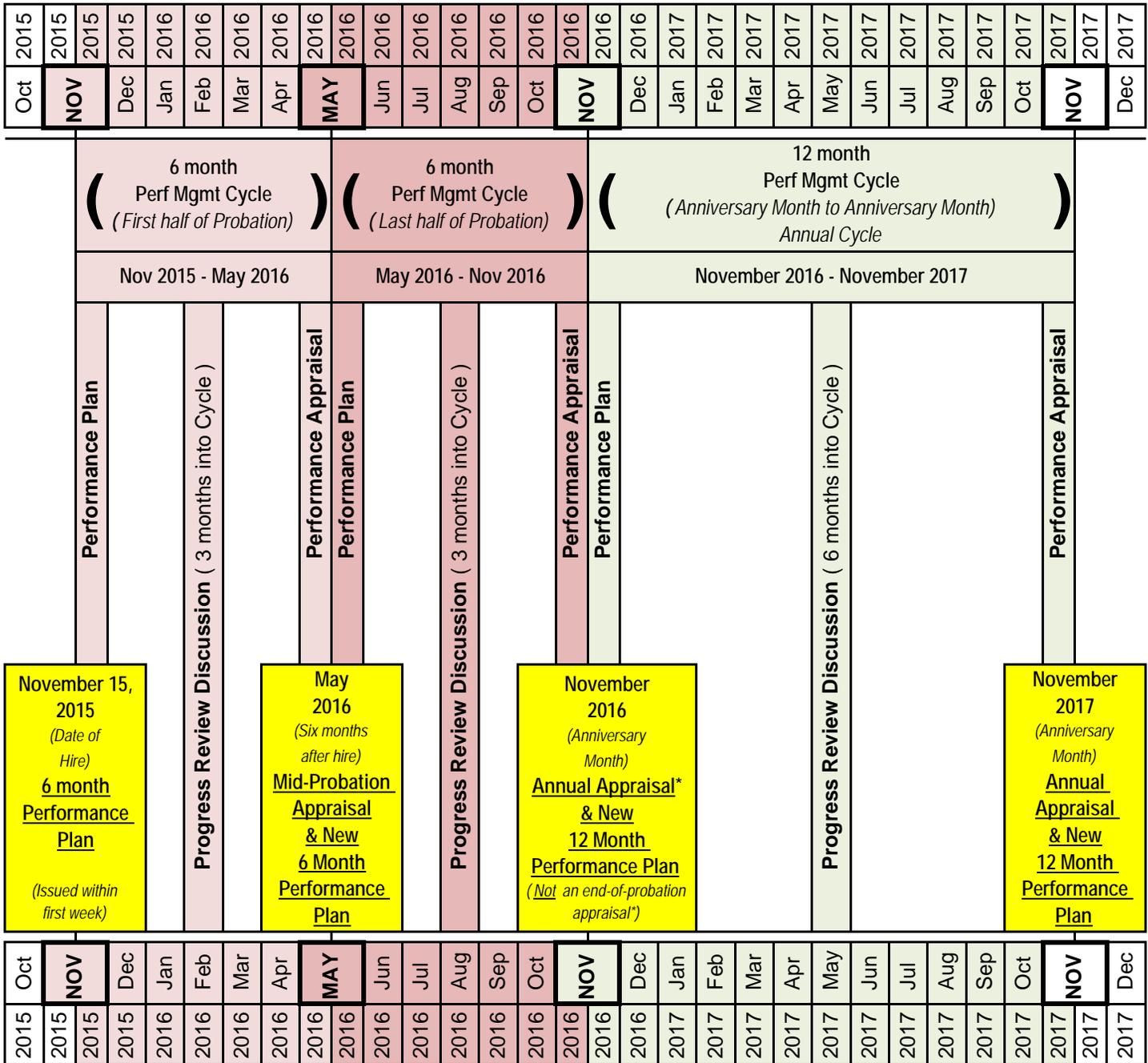
Recognition is used to acknowledge the Employee for his/her achievements and contributions. Although it must not be the sole means used, the Performance Appraisal can provide at least one method for conveying appreciation and recognition.

This guide is not intended to cover every situation or answer every question about the Performance Management Program. For questions, clarification, or assistance with resolving situations or circumstances not covered in this guide please contact the HR Training Officer.

INITIAL PROBATION (Required)

Performance Management Cycle

In accordance with Merit System Rule 15, mid-probation performance appraisals are required at the mid-point of the probationary period being served, *with the exception of promotion probation, which requires an end-of-probation appraisal (in lieu of a mid-probation appraisal)*. At least one progress review discussion must be conducted during the cycle.



End-of-probation appraisals (in lieu of mid-probation appraisals) are required for Promotion Probation only.

This example is for illustrative purposes only. For help with aligning an employee's 12 month cycle with a fiscal year please contact the HR Training Officer for assistance.

Helpful Hint: Begin and end your annual, anniversary-based Performance Plans in the same month for greatest flexibility.

OTHER FORMS OF PROBATION

Performance Management Cycle

Required: Reemployment (MSR 10.2.D); Rehire (MSR 10.2.G).

Optional: Demotion (MSR 10.2.C); Reinstatement (MSR 10.2.E); Reappointment (MSR 10.2.F).

In accordance with MSR 15, mid-probation performance appraisals are required at the mid-point of the probationary period being served, with the exception of promotion probation, which requires an end-of-probation appraisal (in lieu of a mid-probation appraisal).

2015	2015	2015	2015	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2018	2018								
Oct	NOV	Dec	Jan	Feb	Mar	Apr	MAY	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN		
6 month Perf Mgmt Cycle (First half of probation)						8 month Perf Mgmt Cycle (Second half of probation to Anniversary Month)						12 month Perf Mgmt Cycle (Anniversary Month to Anniversary Month) Annual Cycle																													
Nov 2015 - May 2016						May 2016 - January 2017						January 2017 - January 2018																													
Performance Plan						Performance Appraisal						Performance Plan						End of Probation						Performance Appraisal						Performance Plan						Performance Appraisal					
Nov 15, 2015 (Probation - Start) 6 month Performance Plan (issued within first week)						May 2016 (Six months into probation) Mid-Probation Appraisal & New 8 Month Performance Plan						Jan 2017 (Anniversary Month) Annual Appraisal & New 12 Month Performance Plan						January 2018 (Anniversary Month) Annual Appraisal & New 12 Month Performance Plan																							
Oct	NOV	Dec	Jan	Feb	Mar	Apr	MAY	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	JAN		
2015	2015	2015	2015	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2016	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2017	2018	2018

End-of-probation appraisals (in lieu of mid-probation appraisals) are required for Promotion Probation only.

This example is for illustrative purposes only. For help with aligning an employee's 12 month cycle with an anniversary month (or fiscal year) please contact the HR Training Officer for assistance.

Helpful Hint: Begin and end your annual, anniversary-based Performance Plans in the same month for greatest flexibility.