

**SAFMC Performance Evaluation Plan Revision
5/20/2020**

Goal

Update the Performance Evaluation Plan to increase consistency and formalize midterm evaluations.

Issues Addressed

1. Official position descriptions and performance appraisal forms are out of date and inconsistent across positions.
 - Proposed Solution: Revise descriptions and appraisal form
 - Approach: staff revise forms
2. Performance appraisal forms treat both critical and minor responsibilities the same for developing the numerical performance score.
 - Proposed Solution: Provide greater weight to primary responsibilities in the overall performance score
 - Approach: Staff develop a weighting plan and apply to future evaluations
3. Performance appraisal forms are based on broadly defined responsibilities and do not readily support individual staff work planning.
 - Proposed Solution: Develop annual work plans for all staff
 - Approach: Each employee develops a workplan in consultation with their supervisor.
4. Performance appraisal timing is not consistent with the current practice for determining available funds and approving salary changes; reviews are conducted in early November but officially tied to a calendar year.
 - Proposed Solution: modify the timing of reviews
 - Approach: Change timing of reviews

Council Guidance and Proposed Handbook Changes

Handbook Language Changes Overview

- Midterm evaluations are not addressed in the handbook
 - Handbook language will be modified to include “annual and midterm performance reviews”
- Current language specifies a January – December employee evaluation period
 - Handbook language will be modified to address the change in review timing

Phased in Changes

To accommodate the shift in review timing and added midterm reviews, regular annual reviews will be conducted in both November 2020 and July 2021. Initial annual workplans will be prepared for November 2020.

Revised Performance Evaluation Process

The process outlined below applies to all Council employees in the chain of command of the Executive Director. They do not apply to the Executive Director who is evaluated by the Council.

1. Revise Personnel Forms

- Position Descriptions
 - Position descriptions are being updated to better reflect current duties and increase consistency for all staff
 - Revised descriptions are due to be complete by June 15, 2020
- Annual Performance Appraisal Forms
 - Appraisal forms are being updated to match updated position descriptions
 - Revised appraisal forms are due to be complete by July 1, 2020

2. Update Annual Performance Appraisal Scoring

- Revise appraisal forms so that most important tasks and primary responsibilities have the most influence and weight on the overall evaluation score.
 - Senior staff team will come up with a scoring approach by December 2020

3. Develop annual work plans for staff

- Each employee will develop an annual work plan that addresses their tasks, responsibilities, and desired achievements for the coming year
- Tech staff work plans will consider, and be guided by, the Council's overall FMP workplan
- SEDAR Staff workplans will be guided by the SEDAR Project Plan
- Work plans will be reviewed and approved by supervisors

4. Implement Annual and Mid-year evaluations and Modify Evaluation Timing

- Annual Performance Evaluation
 - Conducted by July 15, to address the July 1- June 30 period
 - Evaluation process is unchanged and results in a performance score
 - Evaluation results considered in eligibility for merit increase and cash awards
 - Include consideration of individual staff annual work plans
 - Fulfills the annual performance appraisal required in the handbook
- Midterm Progress Evaluation
 - Conducted by December 1
 - To accommodate the Council meeting schedule, the timing of the mid-term evaluation does not fall exactly on the midpoint of the annual evaluation period
 - The primary goals of mid-term reviews are to evaluate progress on the individual's work plan and address any developing performance issues
 - Review and update individual work plan to address priority changes or workload issues
 - Evaluation process will be similar to the annual evaluations, but the outcome will be qualitative rather than a quantitative score
 - Evaluation results considered in eligibility for merit increase and cash awards