

# Performance Evaluation & Plan (PEP) Info Packet

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## Expectations and Feedback

### Landscaping:

**Expectation:** To meet the park evaluation standards, employees need to prune trees and trim hedges along the south side of the park wall, at least two times per month.

**Feedback:** On average, Susie Q, you are currently completing the task only one time per month.

**Action Item:** Susie Q, you need to increase your pruning and trimming duties by one more time per month.

### Recreation:

**Expectation:** Employees who work at the Recreation Center front desk are expected to answer customer questions about programming, while maintaining a professional and calm tone in all interactions with customers.

**Feedback:** John Doe, you often speak abruptly, raise your voice and have been observed walking away from a customer during a heated exchange.

**Action Item:** John Doe, you must maintain a professional tone in every interaction, with all customers. You should actively listen to customer questions and if frustrated, collect yourself before responding.

### Administration:

**Expectation:** The Healthy Work Environment Unit must provide detailed, accurate *weekly* reports to executive staff by 5pm Thursday. These TPS reports must describe the actions taken to improve work environment conditions that week.

**Feedback:** Joan of Ark, you have been submitting reports Friday morning, with typos, the wrong date, and vague information (i.e., “I was generally pleasant to my co-workers this week”). Executive staff has therefore been unable to assess whether your actions are leading toward an improved work environment.

**Action Item:** Joan of Ark, you must start your reports earlier in the week to meet the 5pm Thursday deadline, review your TPS reports for typos and other errors *at least* twice before submission, and include specific information (i.e., “I held a workshop related to conflict resolution skills”). If you submit your reports to me by 5pm Wednesday, I will review and give you specific feedback prior to submission for the next three weeks.

## STAFF PEP FORM

### Section I, pg.1:

- Cover sheet, Employee Information

### Section II, pg. 1-2:

- Job Information
  - ❖ Use general job description
  - ❖ Add specific aspects of that employee’s job (i.e., 3286 whom acts as facility coordinator for SOMA Rec Center, 3417 covering Buena Vista Park)

### Section III, pgs.3-4:

- A. Organizational Values (Score of 3, 2, 1)
  - ❖ The 5 R’s
- B. Training and Compliance with City and Dept Policies
  - ❖ Did employee use City vehicle for “lunch runs”?
  - ❖ Was employee continuously disrespectful to co-workers?
  - ❖ Did employee complete mandatory SAMs?

- ❖ Check your training history or your staff's training history on the [RPD-U Reports page](#).

#### Section IV, pgs. 5-6:

- Department Strategies, Objectives, and Goals
  - ❖ Promote awareness of our Strategic Plan
- Performance Plan
  - ❖ Ensure performance goals align with our Strategic Plan
  - ❖ Create S.M.A.R.T. Goals
    - Specific
    - Measurable
    - Achievable
    - Relevant
    - Time-Framed

**PLEASE NOTE:** Rec & Park is **ONE** team. **Everyone** fits into the Strategic Plan, so align your goals and those of your staff with the plan, AND focus your energy toward reaching those goals. **TOGETHER** we accomplish our mission and achieve great things!

#### Section V & VI, pg. 7:

- A. Performance Factors (Definition of Ratings)
  - ❖ Operational definition of the Ratings, read carefully
- Performance Factors (Staff only)
  - 1) Attendance and Punctuality
  - 2) Knowledge of Job
  - 3) Quantity of Work Performed
  - 4) Quality of Work Performed
  - 5) Effectiveness in Working with Others
  - 6) Adaptability to Work Situation
  - 7) Use of Materials and Equipment
  - 8) Safety

\*Ratings: Exceeded Expectations, Met Expectations, or Did Not Meet Expectations

Section VII, pg. 8:

A) Overall Performance Rating

- ❖ Consider performance over the ENTIRE rating period
- ❖ Avoid the “[Halo Effect](#)” & the “[Recency Effect](#)”
- ❖ Quantify performance as a whole

B) Overall Performance Summary

- ❖ Summarize all of the ratings throughout the previous sections

**The following is an example of an appropriate performance summary:**

**Example 1 (Job Class X)**

During the performance review period of July 1, 2015 - June 30, 2016, as noted above, Employee X has received an overall performance rating of “2 – Met Expectations.” My observations that have lead to this overall rating are as follows:

Employee X has received a rating of Exceeded Expectations for Resiliency, Met Expectations for Respect, Relationships, and Results, but did receive a rating of Did Not Meet Expectations for Responsiveness. This responsiveness rating was due to not responding to customer emails for 2-3 days on numerous occasions. A reasonable response to customer emails would typically be within 24 hours. Employee X needs to focus on this area of development in the next fiscal year. During this performance period, however, Employee X did show continued resiliency to carry out initiatives in the face of adversity – such as coordinating resources with other Rec Centers to ensure enough chairs were provided for the MLK Luncheon, despite a concurrent event (Mayor’s Opening Event at Minnie Lovie Ward) drawing more spectators than were planned.

In regards to adherence with City and Departmental Policies, Employee X did comply, but we had several ongoing conversations about respectful staff communications (reducing sarcasm and not engaging in workplace gossip/rumors). I am confident that Employee X will minimize that conduct in the future, and Employee X will need to do so to Meet Expectations in the future.

As far as Performance Factors, Employee X Met Expectations on all factors, except Effectiveness in Working with Others. I rated Employee X Did Not Meet Expectations on this factor because I overheard Employee X engaging in workplace gossip on several occasions, and putting forth several hurtful, sarcastic comments directed at co-workers during staff meetings. Again, I would like to reiterate that this conduct is easily remedied, and I expect Employee X improve in this area during FY 16-17.

Overall, Employee X meets my expectations on a day-to-day basis and I appreciate the consistency of effort that Employee X applies to their work. I look forward to setting performance goals with Employee X during the next rating period.

### Section VIII, pg. 8:

#### ☐ Signature Page

- ❖ The most important aspect of the PEP process is that the supervisor and employee meet continuously to discuss performance, both the positives and the areas of improvement
- ❖ The signature page holds supervisors and employees accountable for meeting and discussing performance goals and overall performance feedback
- ❖ Reviewers (Managers) also need to be kept in the loop and must agree and sign-off on goals and feedback prior to finalizing the document with the employee

### Best Practices

- ❖ Give both **Positive** AND **Constructive** feedback

Examples: Employee X needs to focus on making it to work on time as Employee X was 15 minutes late a total of 10 times during the rating period. That being said, Employee X has been very adaptable to changing work situations, such as when work units are down a member or large crowds dictate which area of Alamo Square Employee X can address each morning.

- ❖ Avoid subjective comments, instead **DESCRIBE** the behavior

- Bad: Employee X is “kind.”
- Good: Employee X smiles and says hello to a customer immediately upon them entering the facility, even if she/he cannot wait on the customer immediately.”

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- Bad: Employee X is “rude.”
  - Good: Employee X scowls and tells customers to come back later or “shove it”, if a customer enters the facility and she/he cannot wait on the customer immediately.

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- Bad: Employee X is an intelligent worker and a motivated worker.
  - Good: Employee X is technically savvy and able to complete excel formulas such as V-Look-up and IndexMatch, develops effective pivot tables in excel, and has submitted training requests to develop their skills in Microsoft Access, Publisher, and Adobe Acrobat.

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- ❖ Avoid comments that are not work-related

- Bad: Employee X spends too much time caring for their children/spouse, and not enough time at work.
  - Good: Employee X is having trouble meeting the Department's Attendance Standard and has received information regarding FMLA, and Paid Parental Leave.
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- ❖ Give general information regarding discipline  
Example: Employee X received corrective action regarding communication in January.