



FY22

Employee Performance Evaluation Process

We'll get started soon!





FY22 Employee Performance Evaluation Process



AGENDA

- **Introduction**
- **Overview**
- **Resources**
- **Key Dates and Workflows**
- **100 Pay Plan Instructions**
- **200 Pay Plan Instructions**
- **300 Pay Plan Instructions**
- **Employee Self Assessment Form**
- **FY23 Plans**

The City of Corpus Christi Employee Performance Management Process is designed to:

- Communicate employee performance expectations
- Document and recognize superior employee performance
- Continuously improve performance to ensure the City is the benchmark among Texas Cities

Overview

- As part of the FY 2023 adopted budget, the City Council approved the implementation of a 4% Cost of Living Adjustment (COLA) for all civilian employees effective October 1st, 2022.
- This adjustment replaces the annual 2.5% step increase for 100 Pay Plan employees and the FY 2023 merit-based increases for 200 and 300 Pay Plan employees.
- Additionally, all FY22 employee evaluations will be completed manually via downloadable PDF

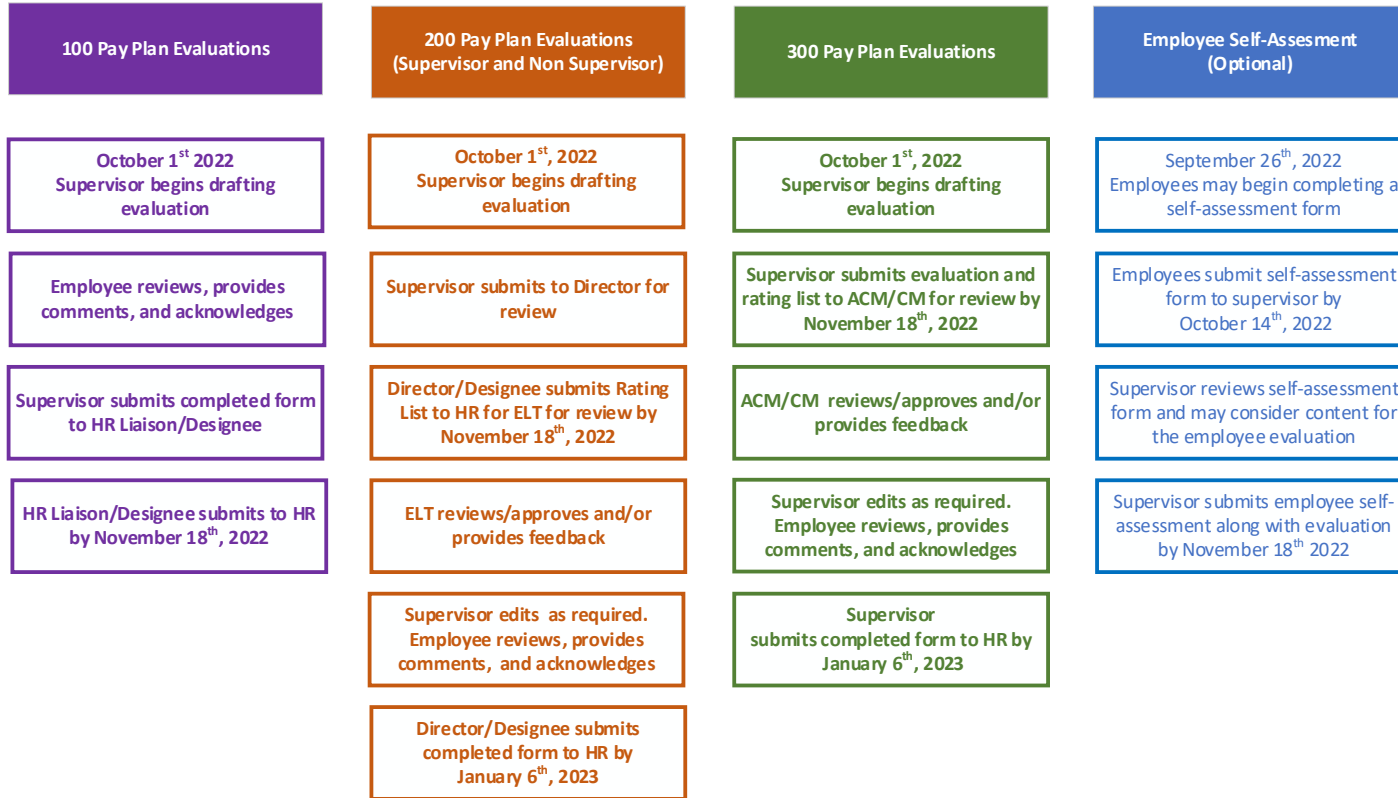
Resources

- ☐ Employee Performance Evaluation Procedural Guidelines
- ☐ 100 Pay Plan Employee Form
- ☐ 200 Pay Plan Non-Supervisor and Supervisor Forms
- ☐ 300 Pay Plan (Executive) Form
- ☐ Employee Self Assessment Form (Optional Form)
- ☐ ***www.learningcc.org/perform/***
- ☐ 200 Pay Plan Rating List

Key Dates

- ❑ **October 1, 2021-Sep 30, 2022:** Performance Observation Period
- ❑ **September 26th, 2022:** Employees may begin completing Self Assessment
- ❑ **October 1st, 2022:** Supervisors may begin completing Evaluations
- ❑ **October 14th, 2022:** Deadline for employees to submit Self Assessment
- ❑ **November 18th, 2022:** Submission deadline
 - ❑ Supervisors submit 100 Pay Plan Evaluations to HR
 - ❑ Directors submit 200 Pay Plan Rating List to HR for ELT Review
 - ❑ Supervisors submit 300 Pay Plan Evaluations to CM for Review
- ❑ **January 6th, 2023:** Completed 200 & 300 Pay Plan Evaluations sent to HR

Workflows



100 Pay Plan



- ▣ **Non-Exempt Permanent-Benefit Eligible Employees**
- ▣ **Employed with City March 31st or Earlier**
- ▣ **Employee list will be sent to Departments NLT Sep 30th, 2022**

- ❑ **October 1, 2021-Sep 30, 2022:** Performance Observation Period
- ❑ **September 26th, 2022:** Employees may begin completing Self Assessment
- ❑ **October 1st, 2022:** Supervisors may begin completing Evaluations
- ❑ **October 14th, 2022:** Deadline for employees to submit Self Assessment
- ❑ **November 18th, 2022:** Submission deadline

Ensure your computer has Adobe PDF Reader

- itservicedesk@cctexas.com

Download the appropriate form

- <http://www.learningcc.org/perform/>

Not completed in Infor (this year)

1-4 Rating Scale

- 1. Does not meet, 2. Needs Improvement, 3. Meets 4. Exceeds

Supervisor completes ID portion of the form

**FY22 100 PAY PLAN EMPLOYEE
PERFORMANCE EVALUATION FORM**

Employee Name:		Employee ID Number:	
Job Title:		Department:	
Supervisor Name:		Supervisor Title:	
Department Director:		Date of Review:	
Review Period Start Date:		Review Period End Date:	

Part I: Supervisor rates employee (1-4 scale) in the listed Core Competencies

- 1 - **Does Not Meet Expectations:** Does not meet the expectations of the job, task, or project. Improvement Plan Required.
- 2 - **Needs Improvement:** Meets some expectations of the job, task, or project. Performance needs improvement.
- 3 - **Meets Expectations:** Successfully and consistently meets the expectations of the job, task, or project.
- 4 - **Exceeds Expectations:** Far exceeds the expectations of the job, task, or project.

PART I: CORE COMPETENCIES	RATING
1. Customer Service Focus: Understands customer's needs, expectations, and City's requirements for public service; Treats customers (internal & external) with courtesy and respect; Responds quickly to all requests.	
2. Service Focus: Values diversity and respects differences; Displays integrity and fully complies with City's code of ethical conduct; Is a positive and reliable representative of the City of Corpus Christi.	
3. Initiative: Generates ideas and initiates action to seek information to solve problems or follow through with a task; is a self-starter.	
4. Quantity of Work: Seeks further assignments when workload permits and consistently completes acceptable volume of work on time.	
5. Quality of Work: Has good attendance, is on time and is present and productive at work; Work consistently demonstrates an understanding of the objectives and mission statement.	
6. Teamwork: Willing to share information and offers aid when possible; consistently looking for ways to improve processes in the workplace.	
7. Compliance: Promotes compliance of policies in regard to workplace safety. Follows all City safety policies and practices; Uses and maintains equipment correctly; Keeps accurate equipment and safety records.	
8. Judgment and Decision Making: Evaluates information and makes sound and timely decisions. Is accountable for results. Selects decision alternatives that meet the objectives of the department.	
9. Communication: Communicates effectively verbally and in writing with team members, colleagues, customers, and managers with widely different socio-economic and educational backgrounds; listens to others and is open minded to suggestions from others.	
Score = Average of above:	0

Part II: Supervisor provides overall comments regarding performance

PART II: COMMENTS SECTION (Optional)
SUPERVISOR - Provide a brief description of the employee's overall performance for the review period:

Employee provides comments

EMPLOYEE - Supervisors should provide employees an opportunity to provide comments. If employee has no comments, they should note "none".

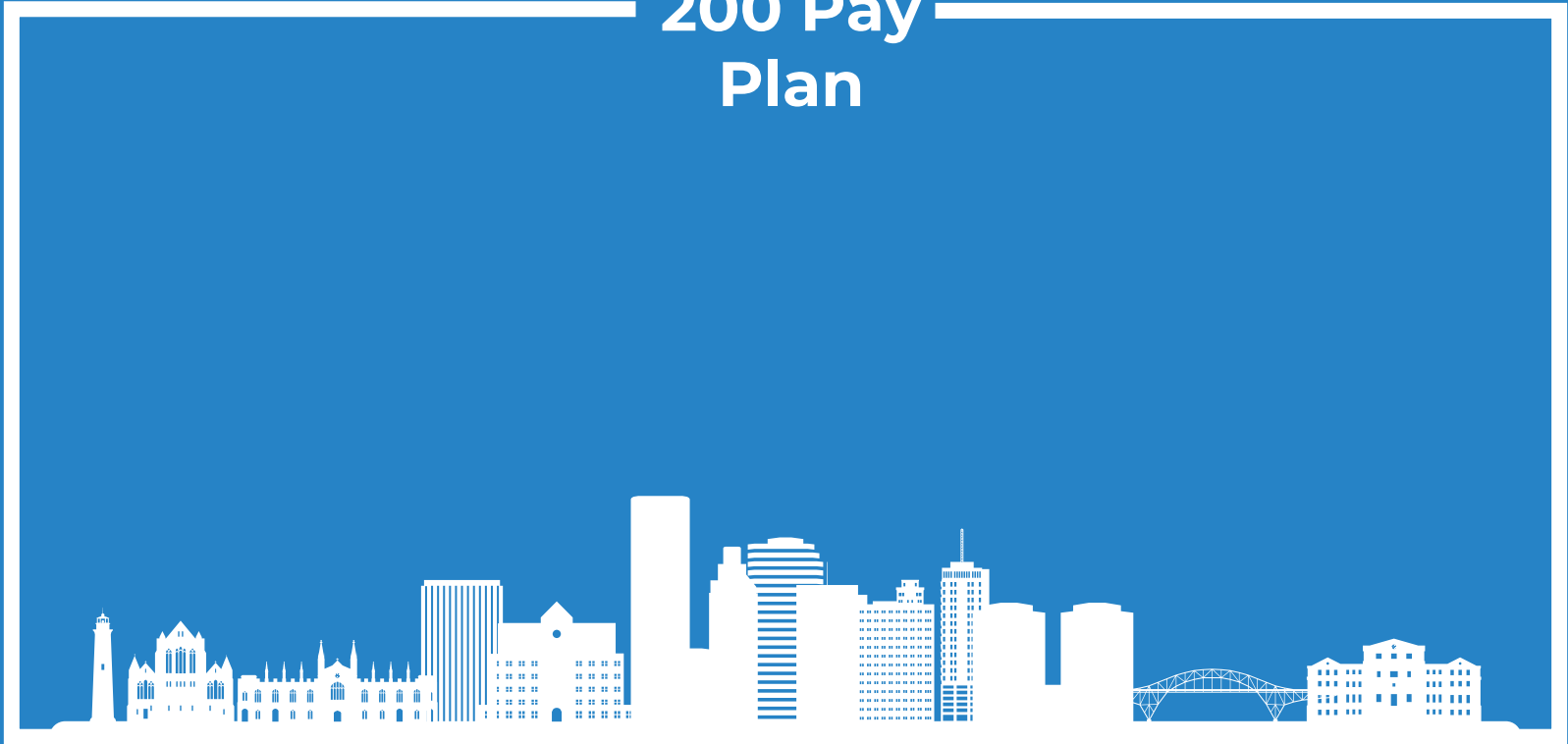
Part III: Employee, Supervisor, Manager (or above) sign

PART III: SIGNATURES (Required)			
EMPLOYEE SIGNATURE:		DATE:	
SUPERVISOR SIGNATURE:		DATE:	
DIVISION MANAGER (OR ABOVE) SIGNATURE:		DATE:	

Part IV: Form Submitted to HR at www.learningcc.org/perform/

PART IV: SUBMISSION (Required)		
HR Liaison or Designee uploaded completed forms at: http://www.learningcc.org/perform/	DATE:	

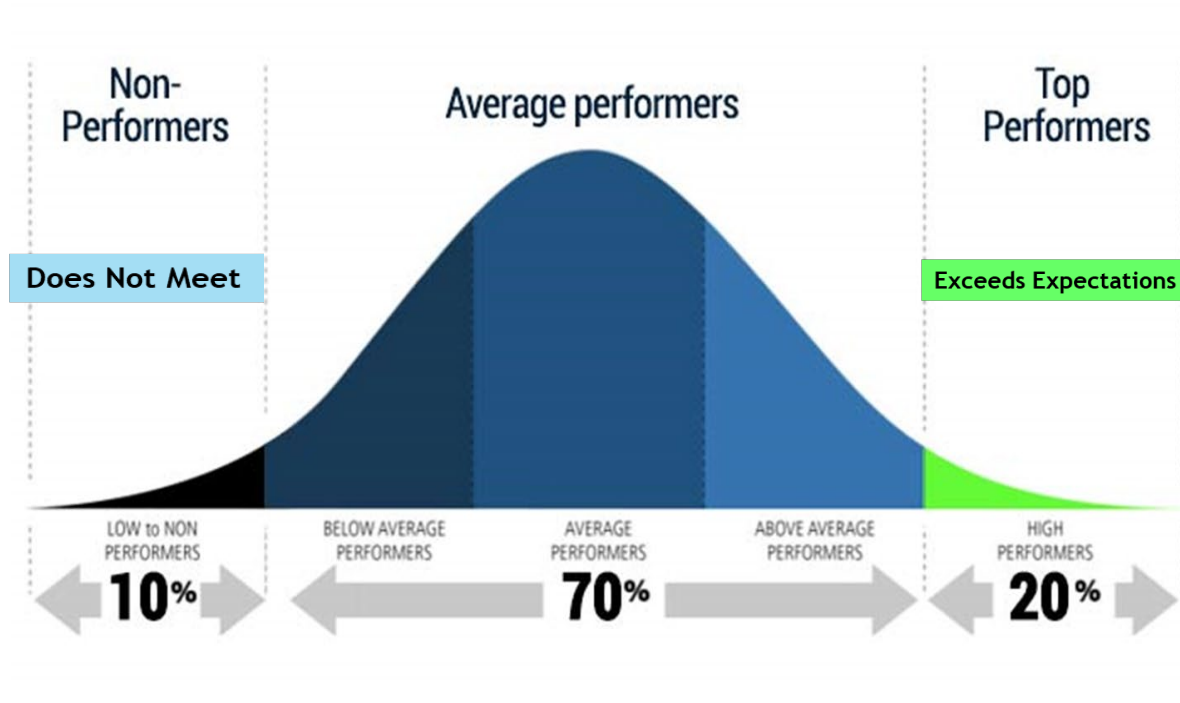
200 Pay Plan



- **Exempt Permanent-Benefit Eligible Employees**
- **Employed with City March 31st or Earlier**
- **Employee list will be sent to Departments NLT Sep 30th, 2022**
- **2 Forms: Non-Supervisor and Supervisor**

- ❑ **October 1, 2021-Sep 30, 2022:** Performance Observation Period
- ❑ **September 26th, 2022:** Employees may begin completing Self Assessment
- ❑ **October 1st, 2022:** Supervisors may begin completing Evaluations
- ❑ **October 14th, 2022:** Deadline for employees to submit Self Assessment
- ❑ **November 18th, 2022:** Director/Designee submits ratings to ELT for review
- ❑ **January 6th, 2023:** Upon ELT approval, signatures collected, submit to HR

200 Pay Plan



Ensure your computer has Adobe PDF Reader

- itservicedesk@cctexas.com

Download the appropriate form

- <http://www.learningcc.org/perform/>

1-4 Rating Scale

- 1. Does not meet, 2. Needs Improvement, 3. Meets 4. Exceeds

NON-SUPERVISOR**SUPERVISOR**

Supervisor completes ID portion of the form

**FY22 200 PAY PLAN: NON-SUPERVISOR EMPLOYEE
PERFORMANCE EVALUATION FORM**

Employee Name:		Employee ID Number:	
Job Title:		Department:	
Supervisor Name:		Supervisor Title:	
Department Director:		Date of Review:	
Review Period Start Date:		Review Period End Date:	

NON-SUPERVISOR

Part I: Supervisor rates employee (1-4 scale) in the listed Competencies

- | | |
|--|--|
| 1 - Does Not Meet Expectations: | Does not meet the expectations of the job, task, or project. <u>Improvement Plan Required.</u> |
| 2 - Needs Improvement: | Meets some expectations of the job, task, or project. Performance needs improvement. |
| 3 - Meets Expectations: | Successfully and consistently meets the expectations of the job, task, or project. |
| 4 - Exceeds Expectations: | Far exceeds the expectations of the job, task, or project. |

PART I: EMPLOYEE PERFORMANCE COMPETENCIES (100% of overall rating; equally weighted)	RATING
1. Accountability – Demonstrates a high level of dependability consistently.	
2. Responsibility – Accepts assignments and complies with all authority, regulations, policies, and procedures.	
3. Cooperation – Demonstrates teamwork by maintaining a positive work environment with all stakeholders.	
4. Judgement – Utilizes analytical and constructive reasoning to make sound decisions, logically.	
5. Job Knowledge – Understands job duties, procedures, practices, processes, skills, and related functions.	
6. Quality of Work – Maintains a high standard of work produced and determines ways to improve.	
7. Communication – Committed to expressing themselves clearly in writing and oral communication effectively.	
8. Initiative – Works independently, generating new ideas and uses originality to meet both routine and unusual situations.	
9. Efficiency – Highly productive and maintains a high volume of work meeting deadlines and achieving desired results.	
10. Customer Service – Demonstrates customer service skills effectively to improve performance and/or processes.	
Score = Average of above:	0

NON-SUPERVISOR

Part II: Supervisor provides status of goals or accomplishments in FY22

PART II: FY 2022 PROFESSIONAL DEVELOPMENT ACCOMPLISHMENTS		
Measure specific goals for Professional Development the employee achieved.		
GOAL 1:		Completion Date:
GOAL 2:		Completion Date:

NON-SUPERVISOR

**Part III: Supervisor provides statement regarding overall performance.
Supervisor and Department Director may sign or wait for ELT review**

PART III: SUPERVISOR STATEMENT OF OVERALL PERFORMANCE		OVERALL RATING	
Provide a brief description of the employee's overall performance for the review period:		0	
		4 = Exceeds Expectations 3 = Meets Expectations 2 = Needs Improvement 1 = Does Not Meet	
Complete the following section upon Executive Leadership Team (ELT) Approval			
SUPERVISOR SIGNATURE:		DATE:	
DIRECTOR SIGNATURE:		DATE:	

Department Level Review – COMPLETE

NON-SUPERVISOR

Part IV: Upon ELT review/approval, supervisor may present evaluation to employee. Employee is given an opportunity to provide comments.

PART IV: EMPLOYEE COMMENTS AND ACKNOWLEDGEMENT SIGNATURE			
<i>Supervisors should provide employees an opportunity to provide comments. If employee has no comments, they should note "none".</i>			
Employee, signing below does not constitute agreement with your performance evaluation. By signing below, you are acknowledging that this performance review has been discussed with you.			
EMPLOYEE SIGNATURE:		DATE:	

NON-SUPERVISOR

Part V: Form Submitted to HR at www.learningcc.org/perform/

PART V: SUBMISSION (Required)	
HR Liaison or Designee uploaded completed forms at: http://www.learningcc.org/perform/	DATE:

SUPERVISOR

Part I: Supervisor rates employee (1-4 scale) in Supervisory Leadership

PART I: SUPERVISORY LEADERSHIP (50% of overall rating; equally weighted)	RATING
1. Leadership and Development <ul style="list-style-type: none"> • Leadership is clear, undisputed, and supported by team members • Handles conflict between team members quickly and effectively • Clearly communicates timelines and expectations to team members • Facilitates communication to ensure that team members are informed about issues, progress, and next steps • Ensures team members have opportunities to develop their skills 	
2. Strategic Thinking <ul style="list-style-type: none"> • Understands and uses financial indicators/metrics to measure performance • Identifies, recruits, and retains great talent that expands our capability and mirrors our customer base 	
3. Drives Excellence <ul style="list-style-type: none"> • Holds employees accountable for performance • Communicates with business partners at all levels regularly, accurately, and in detail • Focuses on the process and operational consistency to reduce cost, improve performance, and meet targeted budget goals 	
4. Decision-Making <ul style="list-style-type: none"> • Causes and underlying issues are analyzed to fully understand situation/ choices prior to decision-making • Empowers the team to solve problems and make decisions 	
Score = Average of above:	0

SUPERVISOR

Part II: Supervisor rates employee (1-4 scale) in Performance Competencies

PART II: EMPLOYEE PERFORMANCE COMPETENCIES (50% of overall rating; equally weighted)	RATING
1. Accountability – Demonstrates a high level of dependability consistently.	
2. Responsibility – Accepts assignments and complies with all authority, regulations, policies, and procedures.	
3. Cooperation – Demonstrates teamwork by maintaining a positive work environment with all stakeholders.	
4. Judgement – Utilizes analytical and constructive reasoning to make sound decisions, logically.	
5. Job Knowledge – Understands job duties, procedures, practices, processes, skills, and related functions.	

6. Quality of Work – Maintains a high standard of work produced and determines ways to improve.	
7. Communication – Committed to expressing themselves clearly in writing and oral communication effectively.	
8. Initiative – Works independently, generating new ideas and uses originality to meet both routine and unusual situations.	
9. Efficiency – Highly productive and maintains a high volume of work meeting deadlines and achieving desired results.	
10. Customer Service – Demonstrates customer service skills effectively to improve performance and/or processes.	
Score = Average of above:	0

SUPERVISOR

Part III: Supervisor details status of goals and accomplishments for FY22

PART III: GOALS AND RESPONSIBILITIES
A description of the goal and actual performance results that includes any specific performance metric or project deadline met.
GOAL 1:
<i>Summary of Accomplishment:</i>
GOAL 2:
<i>Summary of Accomplishment:</i>

SUPERVISOR

Part IV: Supervisor details status of goals and accomplishments for FY22

PART IV: FY 2022 PROFESSIONAL DEVELOPMENT ACCOMPLISHMENTS		
Measure specific Professional Development achievements.		
Accomplishment 1:		Completion Date:
Accomplishment 2:		Completion Date:

SUPERVISOR

Part V: Supervisor provides statement of overall performance

PART V: SUPERVISOR STATEMENT OF OVERALL PERFORMANCE	
Provide a brief description of the employee's overall performance for the review period:	OVERALL RATING
	4 = Exceeds Expectations 3 = Meets Expectations 2 = Needs Improvement 1 = Does Not Meet

SUPERVISOR

Part VI: Upon ELT review/approval, supervisor may present evaluation to employee. Employee is given an opportunity to provide comments.

PART IV: EMPLOYEE COMMENTS AND ACKNOWLEDGEMENT SIGNATURE			
<i>Supervisors should provide employees an opportunity to provide comments. If employee has no comments, they should note "none".</i>			
Employee, signing below does not constitute agreement with your performance evaluation. By signing below, you are acknowledging that this performance review has been discussed with you.			
EMPLOYEE SIGNATURE:		DATE:	

300 Pay Plan



- **Executive, Exempt Permanent-Benefit Eligible Employees**
- **Employed with City March 31st or Earlier**

- ❑ **October 1, 2021-Sep 30, 2022:** Performance Observation Period
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- ❑ **October 1st, 2022:** Supervisors may begin completing Evaluations
- ❑ **October 14th, 2022:** Deadline for employees to submit Self Assessment
- ❑ **November 18th, 2022:** Supervisor submits evaluation to ACM/CM for review
- ❑ **January 6th, 2023:** Upon ELT approval, signatures collected, submit to HR

Supervisor completes ID portion of the form

**FY22 300 PAY PLAN EMPLOYEE
PERFORMANCE EVALUATION FORM**

Employee Name:		Employee ID Number:	
Job Title:		Department:	
Supervisor Name:		Supervisor Title:	
		Date of Review:	
Review Period Start Date:		Review Period End Date:	

Part I: Supervisor rates employee (1-4 scale) in the listed Citywide Goals

- 1 - **Does Not Meet Expectations:** Does not meet the expectations of the job, task, or project. Improvement Plan Required.
- 2 - **Needs Improvement:** Meets some expectations of the job, task, or project. Performance needs improvement.
- 3 - **Meets Expectations:** Successfully and consistently meets the expectations of the job, task, or project.
- 4 - **Exceeds Expectations:** Far exceeds the expectations of the job, task, or project.

PART I: CITYWIDE GOALS (50% of overall rating; equally weighted)	RATING
1. Demonstrates High Ethical and Moral Standards	
2. Committed to a Sound and Effective Management Process	
3. Support for Organizational Diversity and Inclusion	
4. Use of City Performance Analytics and Performance Improvement Assessments	
5. Commitment to Talent Development and Employee Engagement	
6. Commitment to Process Improvement	
7. Support for Employee Wellness and Benefits	
8. Builds Connections with Stakeholders	
9. Fiscal Responsibility	
Score = Average of above:	0

Part II: Supervisor rates employee (1-4 scale) in Supervisory Leadership

PART I: SUPERVISORY LEADERSHIP (50% of overall rating; equally weighted)	RATING
1. Leadership and Development <ul style="list-style-type: none"> • Leadership is clear, undisputed, and supported by team members • Handles conflict between team members quickly and effectively • Clearly communicates timelines and expectations to team members • Facilitates communication to ensure that team members are informed about issues, progress, and next steps • Ensures team members have opportunities to develop their skills 	
2. Strategic Thinking <ul style="list-style-type: none"> • Understands and uses financial indicators/metrics to measure performance • Identifies, recruits, and retains great talent that expands our capability and mirrors our customer base 	
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4. Decision-Making <ul style="list-style-type: none"> • Causes and underlying issues are analyzed to fully understand situation/ choices prior to decision-making • Empowers the team to solve problems and make decisions 	
Score = Average of above:	0

Part III: Supervisor details status of goals and accomplishments for FY22

PART III: GOALS AND RESPONSIBILITIES
A description of the goal and actual performance results that includes any specific performance metric or project deadline met.
GOAL 1:
<i>Summary of Accomplishment:</i>
GOAL 2:
<i>Summary of Accomplishment:</i>

Part IV: Supervisor details status of goals and accomplishments for FY22

PART IV: FY 2022 PROFESSIONAL DEVELOPMENT ACCOMPLISHMENTS		
Measure specific Professional Development achievements.		
Accomplishment 1:		Completion Date:
Accomplishment 2:		Completion Date:

Part V: Supervisor provides statement of overall performance

PART V: SUPERVISOR STATEMENT OF OVERALL PERFORMANCE			
Provide a brief description of the employee's overall performance for the review period:			OVERALL RATING 4 = Exceeds Expectations 3 = Meets Expectations 2 = Needs Improvement 1 = Does Not Meet
Complete the following section upon Executive Leadership Team (ELT) Approval			
SUPERVISOR SIGNATURE:		DATE:	
ELT SIGNATURE:		DATE:	

Department Level Review – COMPLETE

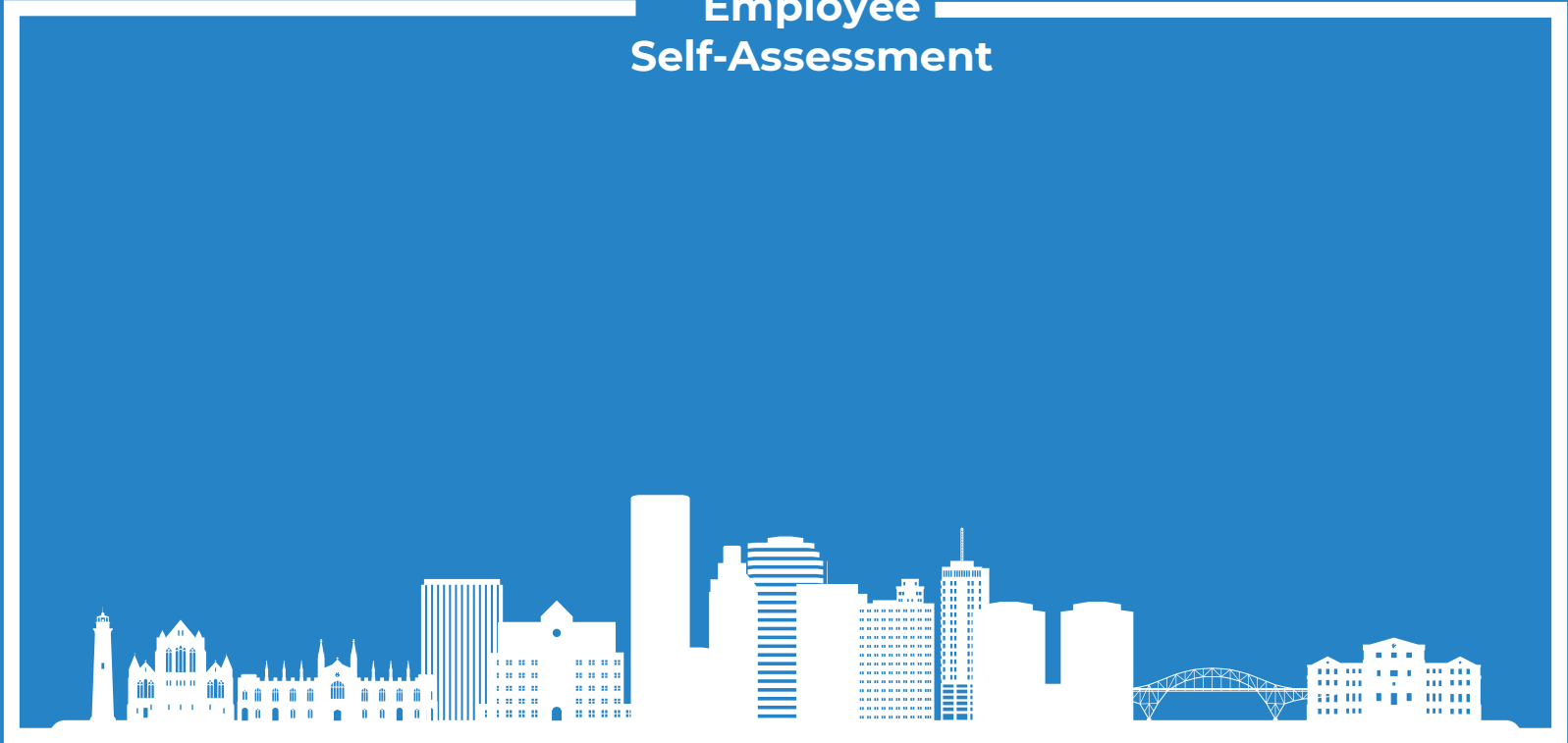
Part VI: Upon ELT review/approval, supervisor may present evaluation to employee. Employee is given an opportunity to provide comments.

PART IV: EMPLOYEE COMMENTS AND ACKNOWLEDGEMENT SIGNATURE			
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Employee, signing below does not constitute agreement with your performance evaluation. By signing below, you are acknowledging that this performance review has been discussed with you.			
EMPLOYEE SIGNATURE:		DATE:	

Part VII: ELT, Designee, or HR uploads completed form

PART VII: SUBMISSION (Required)		
ELT, Designee, or Human Resources uploaded completed forms at: http://www.learningcc.org/perform/	DATE:	

Employee Self-Assessment



Employee Self-Assessment

Employee completes entirety of Self-Assessment Form

Please complete this form and provide it to your supervisor prior to your annual performance review date.

NAME:	
EMPLOYEE ID #:	
JOB TITLE:	
DEPARTMENT:	

Employee Self-Assessment

Employee completes entirety of Self-Assessment Form

1. List what you believe the key elements of your job were during the past year.

2. What were your major accomplishments for the past year?

3. What training and development activities did you complete during the year?

4. What were your major challenges to accomplishing your goals/job responsibilities?

Employee Self-Assessment

Employee completes entirety of Self-Assessment Form

5. What do you believe your key goals should be for next year?

8. What do you need to allow you to attain those goals?

9. Other Comments:

Employee
Self-Assessment

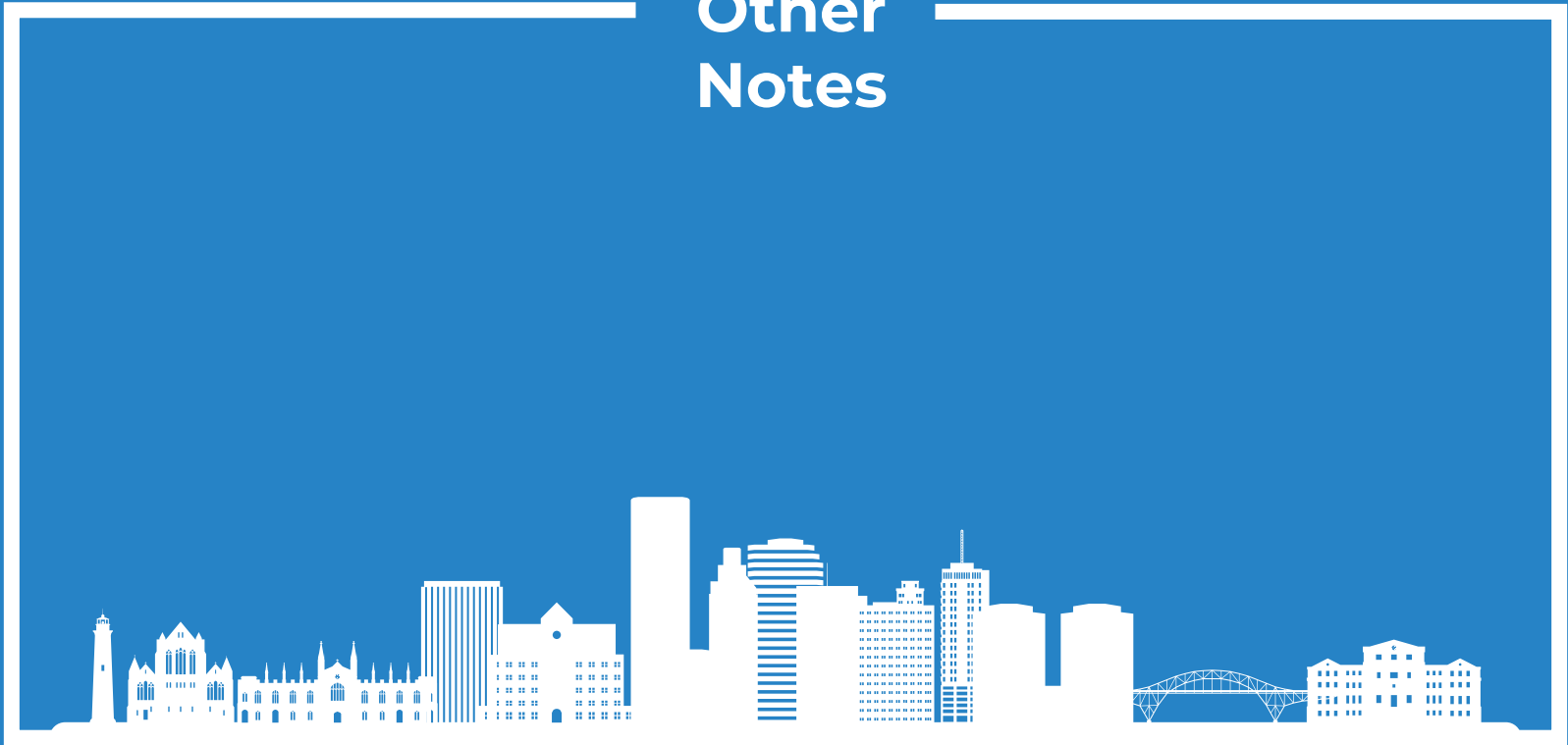
Employee signs Self-Assessment Form

EMPLOYEE SIGNATURE:

DATE:

Supervisor attaches Self-Assessment Form to annual evaluation form

Other Notes



- PDF forms are formulated, however double check overall scores
- Employee Self Assessment Form to be e-mailed to Departments NLT Sep 26th, 2022
- 200 Pay Plan Rating Sheet to be e-mailed to Departments Sep 26th, 2022
- All forms, website, submission system, to be updated and ready NLT Sep 30th, 2022
- Attachments are encouraged if comments exceed space limitations
- www.learningcc.org/perform/

Other Notes

Email of Person Filling Out This Form *

Employee Name *

First

Last

Employee Pay Plan *

Employee Department *

Employee Job Title *

Employee ID Number *

Appraisal Period

Upload Signed Mid-Year Performance Feedback Form for FY2022 *

No file chosen

FY23 Plans



- **Initial Expectations Form**
- **Stay Interviews**
- **Transition Evaluations**
- **Mid-Year Feedback**
- **Infor Updates**
- **Performance-based merit plan for 100, 200, and 300 Pay Plans**

Q&A

