

ADMINISTRATIVE PROCEDURE 7124
MANAGEMENT PERFORMANCE EVALUATIONS

Section I: Performance Evaluation

- A. Purpose: The purpose of the Management Performance Evaluation is to demonstrate commitment to organizational excellence and align performance with the District-wide strategic goals and institutional objectives. This process is designed to assist with improvement of individual performance, thereby increasing institutional effectiveness. The performance evaluation recognizes achievements, establishes training needs, including suggested areas for improvement, and encourages professional development.
- B. Competencies: While leadership in the District and College is a role shared by all employees, management employees play key leadership roles. It is expected that all management employees demonstrate the following core leadership competencies: Accountability, Collaboration, Communication, Integrity, Innovation, Job Knowledge, and Stewardship.
- C. Evaluation Cycle:
1. New Managers.
 - a. Establish performance goals and objectives within 60 days – Within the first 60 days of employment, managers will meet with the supervisors to discuss expectations and the framework for the establishment of goals and objectives which are to be aligned with the District's Strategic Goals and Institutional Outcomes located on the District's website: <http://web.peralta.edu/strategicplan/strategic-plan-documents/>. Within 90 days of employment, each new manager, in consultation with his/her supervisor, shall establish performance goals appropriate for entering his or her new position. The new manager and his/her supervisor will meet, discuss, and finalize the goals.
 - b. Six-month performance review – At the end of six months, the new manager and supervisor will meet to discuss progress. Any written comments shall provide encouragement and/or direction as appropriate.
 - c. Peer/Staff Evaluation feedback – Prior to the conclusion of the new manager's first cycle, Peer/Staff Evaluation Feedback will be conducted in time for inclusion in the manager's first formal performance review.
 - d. Self-Evaluation – The manager shall submit the self-evaluation to the supervisor at an agreed upon time following the completion of the Peer/Staff Evaluation Feedback. The supervisor and the manager shall meet to discuss the manager's self-evaluation. The supervisor shall include the self-evaluation in his or her consideration of the manager's total performance.
 - e. Written performance review – At the completion of the first year of a manager's employment, the supervisor shall complete a written report reviewing the manager's performance. The supervisor and the manager will then meet, discuss the supervisor's report, the results of the Peer/Staff Evaluation Feedback, as well as progress made on the manager's previous goals. As a result of such discussion, the manager shall establish new goals, as appropriate, for the coming year of service.

2. Annual Evaluations:
 - a. All managers will be evaluated annually.
 - b. All managers will establish annual professional goals, which align with the District-wide institutional goals and link/crosswalk between District office and College goals.
3. Evaluation review:
 - a. Self-evaluation by manager
 - b. Supervisor's evaluation
 - c. Refer to previous year's evaluation
 - d. Assess previous year's goals
 - e. Establish goals and objectives for coming year
 - f. Supervisor shares expectations
4. Comprehensive Evaluation – Conducted every three (3) years and includes:
 - a. Peer/Staff Feedback
 - b. Self-evaluation
 - c. Assessment of District and College goals
 - d. Management evaluation of previous year's performance
 - e. Establish new goals for subsequent year.

Section II Core Leadership Competencies and Evaluation Ratings

- A. Core Competencies: It is expected that all management employees demonstrate the following core leadership competencies:
 1. Accountability
 2. Collaboration
 3. Communication
 4. Innovation
 5. Integrity
 6. Job knowledge (refer to job description)
 7. Stewardship
- B. Rating: The following performance measurement terms (***Needs Improvement, Developing, Meets Standard, Exceeds Standards, and Not Applicable or Observable***) describe the employee's performance:
 1. NI - "Needs Improvement"
This individual rarely or never demonstrates the competencies for this category or requires frequent direction/supervision.
Note: If an area is identified that needs improvement in a competency, a written plan for correction should be established, including timelines for improvement and training or other resources, as necessary. Failure to improve within the established timelines may result in further action, up to and including a recommendation to not re-employ after expiration of contract.
 2. D - "Developing"
This individual is learning and developing new skills or may be new to the job/function and is moving in a positive direction toward demonstrating the competencies for this category.
 3. M - "Meets Standard"
This individual consistently demonstrates the competencies for this category. The individual demonstrates the expected behavior in most situations.

4. E - "Exceeds Standard"
This individual consistently demonstrates excellence in the competencies for this category. The individual can be depended upon to demonstrate the expected behavior under *all reasonable* circumstances. The individual's job achievements have added *significant* value to the goals of their team, department, and/or college.
5. NA/O – "Not Applicable or Observable"
This rating is given when the rating factor does not apply or when job performance has not been observed.

Section III. Performance Evaluation Procedures

A. Overview

1. The ratings on pages 2 and 3 are used for the three major sections of the Management Performance Evaluation Forms: Position Responsibilities Form, Annual Goals and Objectives Form, and Core Leadership Competencies Form. Each of the seven Position Responsibilities are reviewed, and an overall evaluation rating is provided. The same procedure is followed for Annual Goals.
2. In rating Core Leadership Competencies, each of the seven areas (accountability, collaboration, communication, integrity, innovation, job knowledge, and stewardship) will have a rating. This rating may come from an average of some or all of the performance indicators listed under each area. If the performance indicators provided do not fully describe a particular Core Leadership Competency, then others may be used at the discretion of the individuals involved. The overall rating for this section is determined by the supervising Manager (Evaluator) after a review of all the evaluation materials. The Evaluator must provide a written rationale for the overall rating.
3. Each Manager being evaluated (Evaluatee) must complete a self-evaluation by completing the Core Leadership Competencies portion of the evaluation. The self-evaluation is an opportunity for the Evaluatee to identify performance strengths, note circumstances that may have affected performance either positively or negatively, and inform the Evaluator of particular accomplishments that may not be reflected in other portions of the evaluation.
4. Comments: An Evaluator's Comments section follows each Core Leadership Competency to allow extra space for further explanation of performance. If additional space is needed, a page (or pages) may be attached.

B. Implementation

1. Immediate Supervisor/Evaluator and Manager/Evaluatee Meet (Refer to the Management Evaluation Timeline)
 - a. Review District and College goals.
 - b. Develop annual Manager goals and related objectives.
 - c. Review job description and identify current major responsibilities.
 - d. Review each Core Leadership Competency area.
2. Review/Summation Session -- Immediate Supervisor/Evaluator and Manager/Evaluatee meet for Formal evaluation on previous year's performance only:
 - a. Major Position Responsibilities
 - b. Goals and Objectives
 - c. Core Leadership Competency Areas
 - d. Manager's Self-Evaluation

3. Establish new or revised goals and objectives which are to be aligned with the District's Strategic Goal and Institutional Outcomes located on the District's website:
<http://web.peralta.edu/pbi/files/2012/08/Strategic-Goals-and-Institutional-Outcomes-2012-20131.doc>
 for the subsequent year.
4. Annual Reviews: During years when comprehensive evaluations are not conducted, Managers will receive annual evaluations.
5. Three-Year Reviews: Every third year, a comprehensive evaluation will be conducted. The Evaluator and Evaluatee will prepare a list of individuals to participate in the Peer/Staff Evaluation Feedback. The individuals identified should include persons within the Evaluatee's sphere of influence and/or persons who are knowledgeable of the Evaluatee's work, including all full-time faculty and a representative number of part-time faculty in a particular division or department, staff, peers, students, and, where appropriate, community members, vendors or service providers. Each individual will be asked to complete an evaluation using the Peer/Staff Evaluation Feedback Form.
6. Management Evaluation Forms: The following is a list of the forms to be used for management evaluations

Form #	Title
1	Position Responsibilities
2	Annual Goals and Objectives
3	Core Leadership Competencies
4	Management Evaluation's Overall Rating
5	Employee's Signature Page Acknowledging Receipt of Evaluation
6	Supervisor's Recommendation and Signature Page
7	Management Self-Evaluation
8	Peer/Staff Evaluation Feedback
9	Management Evaluation Timeline

Approved by the Chancellor: June 3, 2013

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