

Series: HR- Performance Evaluations **COA:** HR 6.01-6.03, TS 2.0, 3.03, 3.05
CFOP: NA

Procedure Name: Performance Evaluations
Procedure Number: HR – 2505
Revision #/Date: (2)03/07 (3)2/09
Effective Date: 9/2004

Applicable to: All CBCB Staff, Regular Volunteers

SUBJECT: Performance Evaluations

PURPOSE: To develop and promote professional growth of CBC of Brevard employees through a comprehensive performance evaluation process conducted between the employee, regular volunteer and the supervisor. This process addresses both technical and behavioral competencies required to fully meet the expectations of the job and affords the individual the opportunity to develop and demonstrate these skills and to determine and work on future training and development needs and opportunities.

PROCEDURE:

References

(to be added as applicable)

1. CBC of Brevard supports the professional development and success of its employees. As a part of this process a 90-day orientation evaluation is conducted for each new staff member and employees who transfer or are promoted into new positions with the Agency. This evaluation will document the employee's ability to perform the assigned functions and responsibility. Based on the documentation in this 90-day orientation evaluation, the orientation period for the employee may end or be extended with specific results and demonstration of skills that must be accomplished in a defined period of time. During an employee's first 90-days in a new position, the employee and supervisor will meet on a regular basis.
2. Upon successful completion of the orientation period, the employee and supervisor will meet minimally on a monthly basis to discuss performance, technical and behavioral competencies and professional development opportunities.
3. All employees and regular volunteers will receive annual evaluations based on their date of hire and/or date of transfer or promotion or position assignment.

4. If an employee transfers or is promoted to a different position the supervisor will complete an annual evaluation for the period of time since the last annual evaluation. A new 90-day orientation evaluation will become effective upon the date of the new position.
5. If the employee is making a lateral transfer but is merit eligible and the Agency has funded a merit program for the fiscal year, the supervisor may recommend a pro-rata merit increase for the period of time since the last annual evaluation and the date of transfer. In this case, the employee will be on a new 90-day orientation period and annual cycle from the date of transfer.
6. If the employee is being promoted, and the Agency has a funded merit program for the fiscal year, the employee may receive a promotional increase at the time of promotion and will then be on a new 90-day orientation period and annual cycle from the date of promotion. The supervisor will complete an annual evaluation for the period of time since the last annual evaluation.
7. Managers are provided with advance notification of 90-day and annual reviews with reminders provided 60 days and 30 days in advance of the due date.
8. Annual reviews should be completed three (3) weeks prior to the due date and submitted to the next level(s) of management. This allows the time necessary for the various levels of management review and signatures prior to the due date. Managers who, due to extenuating circumstances, are concerned with missing the deadlines must request an extension from their manager and the Chief Personnel & Administrative Officer.
9. An extension may be granted depending on the circumstances. Absent an approved extension in writing, managers who fail to complete the evaluations on a timely basis will be subject to disciplinary action for failure to comply with stated Agency policy.
10. All annual evaluations are completed and signed by the immediate supervisor and the next levels of management up to and including the Officer level. All evaluations are reviewed and approved by the Chief Personnel & Administrative Officer before being submitted to the Chief Executive Officer for final approval.
11. Once the evaluation has been approved it is returned to the direct supervisor who will meet with the employee to discuss the evaluation.
12. During the annual performance evaluation, the supervisor will address many areas including, but not limited to:
 - The specific expectations defined in the job description and the rationale supporting the supervisor's assessment of the individuals' technical and behavioral competencies;
 - Adherence to Agency expectations including complying with all established policies and the principles and values of the System of Care;
 - An assessment of the prior stated goals and deliverables and objectives for the individual;
 - The new year goals, deliverables and objectives;
 - Specific training areas or needs to be addressed during the new year for skill building for current or potential future roles;
 - Initiative and teamwork;

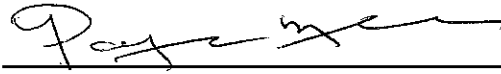
- Communication skills;
 - Cultural respect and sensitivity and the ability to respond to the unique culturally-defined needs of co-workers and children and families served; and
 - Collaboration and problem-solving skills;
 - The supervisor and employee will jointly determine the new goals for the upcoming year and what additional support the supervisor can provide to the employee. This is documented on the evaluation.
13. At the conclusion of the performance evaluation discussion the employee or regular volunteer will be afforded the opportunity make written comments and will sign the evaluation. Once the evaluation process is completed, the manager will return the performance evaluation to the Chief Personnel & Administrative Officer to be filed in the employee's personnel or volunteer file. Employees and volunteers are permitted to make a copy of the evaluation for their files and reference.
 14. If an employee is dissatisfied with the performance review discussion he or she may request to speak with the next level of management and/or the Chief Personnel & Administrative Officer to share the concerns. In this event the management individual and/or Chief Personnel & Administrative Officer will evaluate the employee's concerns and depending on the nature of the issues meet with the immediate supervisor to surface the discrepancies between the employee and supervisor. Part of this process will include a review of the supervisor's supervision notes to determine if the supervisor had adequately communicated concerns to the employee prior to the evaluation.
 15. Each case will be handled based on the facts of the situation but in all cases minimally the management staff and/or the Chief Personnel & Administrative Officer will communicate directly with the employee with the results of the information they gained. In most cases these individuals will facilitate a meeting between the supervisor and employee designed to gain consensus on the issues and to address the next steps if appropriate.
 16. If an employee remains dissatisfied after this process, the employee may prepare a document to be placed in the employee personnel file and may request a meeting with the Chief Executive Officer to share the concerns.
 17. The evaluation process and the monthly supervision feedback sessions provide an opportunity for collaboration and two-way communication between the employee and supervisor to discuss the employee's performance, successes, growth areas and training needs. This is also a time to discuss an employee's interests and future goals as applicable. These one-on-one meetings are to be used for the mutual benefit of the parties and ultimately the Agency and the clients it serves.
 18. If an employee is failing to meet performance objectives, is not complying with behavioral expectations and/or after specific coaching by the supervisor is not meeting expectations, the supervisor will utilize the progressive discipline process outlined in Guidelines For Appropriate Conduct. In these cases a written corrective action may be provided to ensure that the employee clearly understands the performance expectations and how these are not being met and the potential consequences if the individual is not able to satisfactorily demonstrate competence in a defined time period. The supervisor, employee (or volunteer) and Chief Personnel & Administrative Officer will execute this document and it will be placed in the employee's personnel file.

Community Based Care of Brevard, Inc. Policy and Procedure Manual

ATTACHMENTS:

90-day Orientation Evaluation
90-Day New Employee Checklist
Monthly Feedback Tool
Annual Evaluation Tool

BY DIRECTION OF THE CHIEF EXECUTIVE
OFFICER:



DR. PATRICIA NELLIUS-GUTHRIE
Chief Executive Officer
CBC of Brevard, Inc.

APPROVAL DATE: 3/5/09