

PROCEDURE

Series:	HR-Performance Evaluations	COA: HR 6.01- 6.03; MIL-TS 2.01, 3.03, 3.05
Procedure Name:	Performance Evaluations	CFOP:
Procedure Number:	HR 2505	
Revision #/Date:	(2)03/07, (3)2/09, (4) 2/15/13, (5) 8/11/14, (6) 9/16/16, (7) 5/1/19	
Effective Date:	09/04	
Applicable to:	BFP Family of Agencies (BFP FOA) Staff, Regular Volunteers	

PURPOSE: To develop and promote professional growth of agency staff members through a comprehensive performance evaluation process conducted between the employee 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 performance review process

PROCEDURE:

1. The employee and supervisor meet minimally on a monthly basis to discuss and document performance, technical and behavioral competencies, and professional development goals and opportunities.
2. All employees receive annual evaluations based on their date of hire and/or date of transfer or promotion or position assignment.
3. If an employee transfers or is promoted to a different position the supervisor will complete an annual evaluation for the period since the last annual evaluation.
4. 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.
5. 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 annual cycle from the date of promotion. The supervisor will complete an annual evaluation for the period since the last annual evaluation.
6. Managers receive advance notification of annual reviews with reminders provided 60 days and 30 days in advance of the due date. It is the responsibility of the manager to ensure that the performance evaluation is prepared in advance of the due date and submitted timely electronically to the Human Resources Manager (HR Manager) for review.
7. Annual reviews should be completed and signed by the supervisor three (3) weeks prior to the due date and submitted electronically to the HR Manager. This allows the time necessary for the various levels of management review and signatures prior to the due date.
8. The HR Manager will coordinate the proper approvals up to and including the appropriate Executive, Vice President of Operations, and CEO.

9. Supervisors who, due to extenuating circumstances, are concerned with missing the deadlines must request an extension from their manager and the HR Manager.
10. An extension may be granted depending on the circumstances. If an extension is granted, the evaluation will be due electronically to the HR Manager on or before the end date of the extension. The extension period, depending on the circumstances shall not exceed 30 days from the original due date unless approved in exceptional circumstances. Absent an approved extension management staff who fail to complete the evaluations on a timely basis will be subject to disciplinary action for failure to comply with stated agency policy.
11. Once the Vice President of Operations and the CEO review and sign the annual evaluation it will be returned to the Human Resource Manager.
12. The HR Manager will return the evaluation to the supervisor who will meet with the employee to discuss and review the evaluation.
13. During the annual performance evaluation, the supervisor will address the following to include, 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 and any plans required;
 - 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.
14. At the conclusion of the performance evaluation discussion the employee or regular volunteer will be afforded the opportunity to make written comments and will sign the evaluation. Once the evaluation process is completed, the supervisor will return the performance evaluation to the HR Manager 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 own reference.
15. 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 HR Manager to share the concerns. In this event management and/or the HR Manager will evaluate the employee's concerns (and depending on the nature of the issues) meet with the 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.



16. Each case will be handled based on the facts of the situation but in all cases minimally the management staff and/or the Human Resources Manager 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.
17. 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 Vice President of Operations or Chief Executive Officer to share the concerns.
18. The evaluation process and the monthly supervision coaching and mentoring 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. When areas of performance improvement are needed a supervision form should be completed with the staff person present, outlining the goals and strategies for improvement. If an employee is not meeting expectations in a particular area, supervision meetings should be handled minimally on a monthly basis. In cases where an employee is not performing at the expected level and he or she is placed on a Performance Improvement Plan, the supervisor must submit a monthly status report to the appropriate Senior Executive, Chief Executive Officer, Vice President of Operations, and HR Manager.
19. 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 the Guidelines For Appropriate Conduct in the Employee Handbook. 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 Human Resources Manager will execute this document and it will be placed in the employee's personnel file.

BY DIRECTION OF THE CHIEF EXECUTIVE OFFICER:

PHILIP J. SCARPELLI
 Chief Executive Officer
 Brevard Family Partnership Family of Agencies

APPROVAL DATE: 2/18/2020