



## PERFORMANCE EVALUATION PROCESS FOR COUNCIL APPOINTEES

### **POLICY**

The purpose of this Policy is to provide guidance and establish a process for the performance evaluation and assessment of City Council appointees by the City Council, including employees in the classifications of City Manager and City Attorney.

The City Council will make its best efforts to undertake a performance appraisal of the appointees at least once every twelve (12) months. The City Council maintains discretion to conduct performance appraisals more frequently. Performance Appraisals shall be conducted annually in accordance with the process set forth below. This process is intended to be essentially “automatic,” and does not require Council or employee direction to be initiated.

This Policy shall be referenced in the employment agreements of the Council appointees. If a Council appointee begins City employment before July 1<sup>st</sup>, then the duration of the first rating period shall be as set forth in the negotiated employment agreement. If a Council appointee begins City employment after July 1<sup>st</sup>, then the first rating period shall run from the start date through December 31<sup>st</sup> of the following year. Thereafter, the timeline and process for performance appraisal shall be as set forth below.

### **PROCEDURE**

- 1) For purposes of this Policy, an employee’s annual rating period shall be January 1<sup>st</sup> through December 31<sup>st</sup> of each year.
- 2) The Human Resources Director shall meet with the Council in closed session, if necessary, to discuss the appraisal process and scope of work for the performance appraisal facilitator. The Human Resources Director will then conduct a procurement for a performance appraisal facilitator, and shall present the results of such procurement process to Council for Council’s final selection in September (with closed and/or open session meetings, as necessary), unless the City has an existing contract with a facilitator. The facilitator must be available to begin work in October.
- 3) Staff shall work with the Finance Department to ensure sufficient budget is available to fund the type of performance appraisal process chosen by the Council.



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- 4) During the months of November and December, the chosen facilitator will meet with the City Council and any other identified members of staff to conduct the interviews necessary for the performance appraisal.
- 5) At the second meeting in January, the facilitator will meet with City Council and Employee in closed session to provide the results of their work.
- 6) At the second meeting in February, the City Council shall meet in closed session to (a) discuss and determine the form and substance of the performance appraisal, the method for preparation of a written appraisal if necessary, and goal-setting priorities for the employee, and (b) discuss and appoint a subcommittee to meet with the employee for the purposes of negotiating goal-setting, compensation, benefits, and any other requested modifications to the employee's employment agreement.
- 7) During the months of March-April, the subcommittee shall meet with the Employee for the purposes of negotiating compensation, benefits, and any other requested modifications to the Employee's employment agreement. The subcommittee will work with the Human Resources Director and Chief Assistant City Attorney, as necessary.
- 8) At the second meeting in May, the subcommittee shall return to the full City Council in closed session to present the results of its negotiations, and provide a recommendation to the full City Council for further discussion and action in open session. The City Council shall provide direction to the Human Resources Director regarding the details of the item to be brought back to Council in open session.
- 9) If City Council does not complete the process outlined above on or before May 31<sup>st</sup>, then Employee shall receive a salary increase of approximately 2% or applicable CPI<sup>1</sup>, whichever is less, effective as described below.

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<sup>1</sup> Consumer Price Index for All Urban Consumers (CPI-U) for San Francisco-Oakland-Hayward



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- 10) During the month of June, the Human Resources Director shall bring forward an item in open session regarding approval of the modifications to the compensation, benefits, or other terms of employment for Employee, and related actions, to be effective the first pay period after July 1<sup>st</sup>, or other retroactive effective date as set forth in the appointee's employment agreement. This shall be based either on the direction received from City Council under Section 8 above, or the default salary adjustment described in Section 9 above. If the direction from Council is that there are no modifications to any such terms, then there shall be no item brought to Council in open session for further discussion or action.
- 11) If the default salary adjustment under Section (9) was granted, then the City Council may take action later in the year to provide an additional adjustment, retroactive to the first pay period after July 1<sup>st</sup>, or other retroactive effective date as set forth in the appointee's employment agreement