MEMORANDUM

Date: October 19, 2011

To: College Presidents via Management Training 10/19/2011 & Email
    District Management

From: Trudy Largent, Vice Chancellor for Human Resources & Employee Relations

cc: Wise Allen, Chancellor

Subject: 2010-2011 Management Evaluation

In October 2011, the Chancellor’s Strategic Management Team agreed to support the implementation of a new performance evaluation model commonly known as S.M.A.R.T (attached). This was developed based on the need to evaluate managers specifically on measurable and obtainable goals. They include new core competencies aligned with the job standards and a standard rating scale. This effort is consistent with the Chancellor’s strategic goal that the Colleges and the District must improve its method of evaluating performance and giving administrators constructive feedback.

As of this evaluation period, the new forms and rating scale will be used in the District. Changes in individual ratings compared to last year do not necessarily indicate a change in performance unless explicitly stated in the evaluation.

Overall ratings in the future will depend on basic job knowledge, performance in the core competencies, and achievement of annual goals. Ratings may vary from year to year depending on the nature of the goals and success in achieving them.

Please find enclosed the Management Evaluation Forms for the current year. Included in the package are:

- Timeline for Evaluators
- S.M.A.R.T. Goals Guideline
- Peer/Staff Feedback List (Pink)
- Peer/Staff Input Evaluation (Yellow)
- Peer/Staff Input Administrative Evaluation Instructions (White)
- Areas of Strength & Development Evaluation Form (Salmon)
- Self-Assessment Evaluation (Green)
- Manager Performance Evaluation Form (which includes a section for Management Goals) (Blue)
- Supervisor Recommendation and Signature Page (Goldenrod)
Instructions for Presidents/Vice Chancellors/Chancellor

**Step 1** The supervising administrator (College President, Vice Chancellor, and Chancellor) are to send peer staff evaluation forms to their direct reports. Supervising administrative evaluators may designate a “confidential employee” (must be from the Office of the College President, Vice Chancellor, General Counsel, or Chancellor) to disseminate, collect, and tally evaluation forms for the evaluator’s direct report. All evaluation forms and dialogue is to be kept in strict confidence.

Please have peer staff evaluators return their assessments in a legibly signed (print and sign) envelope, to the supervising administrator’s attention (College President, Vice Chancellor, General Counsel or Chancellor). Please inform peer staff evaluators to not send their forms to the Human Resources office. All transactions must be returned to the supervising administrator’s attention.

Direct reports will select 20 members (administrators, faculty, classified, or community) either by email, mail, or interoffice envelope. Request that these forms be returned to the immediate supervisor in a plain envelope marked confidential.

The envelope must be signed in order to be tallied (by the supervising President/Vice Chancellor/General Counsel/Chancellor) and ranked, for example: a rating of 3 exceeds expectations; a rating of 2 meets or exceeds performance expectations; a rating of 1 partially meets performance expectations; a rating of 0 does not meet performance; and N/A indicates not applicable or not observed.

The supervising administrator’s confidential designee should maintain a spreadsheet of all results and tally the overall scores of each direct report at their sites.

Peer staff evaluations may be completed by “any employee” even if they are not a part of the 20 listed members. However, in order to be counted toward the tally, which will be maintained in the supervising administrator’s office, the peer staff evaluator must print and sign legibly on the return envelope to the Office of the President, or Vice Chancellor, or Chancellor in order for the assessment to be accepted.

**Step 2** Goal setting / initial conference in which the District or College goals are established and listed; the individual manager’s performance goals are listed; and the activities to meet those goals are listed This form is to be submitted to the supervising manager (College President, Vice Chancellor or Chancellor)

**Step 3** All managers are to complete the Manager Performance Evaluation Goal Setting and Self-Assessment forms and submit to their supervising administrator for the final evaluation to be completed

**Step 4** Supervising managers are to evaluate their direct reports based on the prior year’s performance, goal setting, and self assessment and may share some of the feedback from the manager’s peer/staff evaluations. Signature pages are to be signed with the recommendation
for retention (excellence); retention (exceeds expectations ); conditional retention (need for improvement); conditional or non-retention (performance is problematic).

All forms are to be signed by both manager and supervising administrator and all results, once tallied by the College President, the Vice Chancellor, the General Counsel, or the Chancellor are to be submitted to the **Vice Chancellor of Human Resources and Employee Relations** who will provide the final information to the Chancellor for review and Board contract recommendations. All evaluations will be placed in the evaluatee’s personnel file.

Evaluations should be completed and returned to the offices of the President or Vice Chancellor, or the Chancellor by no later than **February 1, 2012**.

Thank you.
Attachments