

# **ST. CLAIR COUNTY COMMUNITY MENTAL HEALTH AUTHORITY**

## **ADMINISTRATIVE PROCEDURE**

Date Issued **01/24**

Page 1

|  |  |  |                       |  |
|--|--|--|-----------------------|--|
| <b>CHAPTER</b><br>Human Resources                  |  | <b>CHAPTER</b><br>06   | <b>SECTION</b><br>001 | <b>SUBJECT</b><br>0030                   |
| <b>SECTION</b><br>Personnel                        |  | <b>SUBJECT</b><br>Personnel: Employee Performance Review and Development |                       |  |
| <b>WRITTEN BY</b><br>Employee Evaluation Committee |  | <b>REVISED BY</b><br>Jody Kruskie  |                       | <b>AUTHORIZED BY</b><br>Tracey Pingitore |

### **I. APPLICATION:**

- ☐ SCCCMHA Board
- ☐ SCCCMHA Providers & Subcontractors
- ☒ Direct-Operated Programs
- ☐ Community Agency Contractors
- ☐ Residential Programs
- ☐ Specialized Foster Care
- ☐ SUD Providers

### **II. PURPOSE STATEMENT:**

St. Clair County Community Mental Health Authority (SCCCMHA) shall ensure interactive, timely, effective and meaningful employee performance reviews are completed.

### **III. DEFINITIONS:**

None Available

### **IV. STANDARDS:**

- A. Performance reviews shall be completed in coordination with all employees, including all contract employees.
- B. Performance reviews will be completed in accordance with the following minimum guidelines, as appropriate:
  - 1. Annual performance reviews are required yearly in January.
  - 2. Probationary employees shall be provided with performance review, documented through the ADP Performance Dashboard 90 Day Evaluation form on or about ninety (90) days of employment. Further documentation on an Employee Communication Memorandum will be done if needed prior to the completion of the probationary period. At the completion of one hundred eighty (180) calendar days of employment, the Authority will send the employee a notification through ADP Performance Dashboard of satisfactory completion of the probationary period or with a notice of release from employment. An extension of the probationary period is at the sole discretion of the Authority.

|                                   |  |  |                       |                        |
|-----------------------------------|--|--|-----------------------|------------------------|
| <b>CHAPTER</b><br>Human Resources |  | <b>CHAPTER</b><br>06   | <b>SECTION</b><br>001 | <b>SUBJECT</b><br>0030 |
| <b>SECTION</b><br>Personnel       |  | <b>SUBJECT</b><br>Personnel: Employee Performance Review and Development |                       |                        |

**NOTE:** If the employee is hired prior to October 1<sup>st</sup> of any given year then an annual performance review will be required in January of the following year. If an employee is hired after October 1<sup>st</sup> of a given year a performance review in January is optional at the discretion of the supervisor. Supervisors should be consistent with application of this. e.g. if an employee was hired 10/5/xx then a performance review probably should be done in January of the following year (it can be combined with the 90 day evaluation). If the employee was hired 12/15/xx then a performance review in January of the following year is probably not appropriate. In any event, employees hired after October 1<sup>st</sup> of a given year must have a 90 day evaluation completed.

3. Transfer performance reviews are required prior to the date an employee is scheduled to transfer out of a program.
4. A Local 3385 and/or Chapter 20 employee who requests a transfer within their same classification to another location, program or division must successfully complete a ninety (90) day trial period.
5. A trial period for all bargaining unit employees who are promoted or awarded new positions into a different classification shall be provided as follows:
  - a. sixty (60) calendar days for para-professional and clerical classifications
  - b. one hundred twenty (120) calendar days for professional classifications

At the beginning of the trial period, written performance review criteria will be presented to the employee. Midway through the trial period, the employee and his/her supervisor will meet to review the employee's performance. Should there be any deficit areas identified, the employee will receive a written plan for improvement, as appropriate. The trial period can be extended with mutual agreement among the Authority, the employee, and the Union. An extension shall not be subject to the grievance procedure.

- C. Supervisory staff may use the Employee Communication Memorandum (form #0702), available on the intranet, Agency Forms, to document intermittent contacts, accolades, improvement opportunities, progress on a performance review employee action plan and/or progress on a corrective action plan, and 90 day evaluations. (See Administrative Procedure #06-001-0020 Personnel: Supervision of CMH Staff).
- D. Functional Job Task Lists (FJTL) are required upon initial employment (see Administrative Procedure #06-001-0080 Personnel – Job Descriptions – Function Job Task Lists (FJTL). FJTL should be updated on an ongoing basis to best reflect current employer expectations, and included in the personnel file. The FJTL is independent of the Employee Performance Review process, and should be included with the annual Employee Performance Review..

|                                   |  |  |                       |                        |
|-----------------------------------|--|--|-----------------------|------------------------|
| <b>CHAPTER</b><br>Human Resources |  | <b>CHAPTER</b><br>06   | <b>SECTION</b><br>001 | <b>SUBJECT</b><br>0030 |
| <b>SECTION</b><br>Personnel       |  | <b>SUBJECT</b><br>Personnel: Employee Performance Review and Development |                       |                        |

- E. Direct supervisory staff are responsible for initiating and ensuring the performance review is completed in a timely manner.
- F. All staff shall be given the opportunity to provide feedback about their supervisor at the time of supervisor's evaluation.
- G. Performance Reviews are due in January, however in the case of probationary and/or trial periods; employees may be evaluated prior to the evaluation date(s).
- H. Employees interested in promotion opportunities should indicate such at the time of his/her performance review and forward a memorandum to appropriate Authority staff. Note that neither of these is required to be considered for promotion.
  - a. Supervisors should discuss, with the employee who is interested in career planning, promotion guidelines or specific training required for the position which the employee is interested in.
- I. Job Descriptions are to be reviewed annually at the time of the employee evaluation for accuracy and content, and any recommended changes should be noted by the supervisor and uploaded in ADP to be included with the annual review.

V. PROCEDURES:

A. Preparation

**Supervisor**

1. Ensures an updated Functional Job Task List (FJTL) is completed if necessary.
2. Completes a performance review using the ADP Annual Assessment form.
3. Notifies the employee of upcoming evaluation, using Notification of Evaluation (form #0733 available in Forms Index); sends out the Supervisor Feedback (form #0729 available in Forms Index), if applicable.

B. Probationary/Transferred/Promoted Performance Reviews

**Supervisor**

1. Schedules a mutually convenient date and time for performance review.

|                                   |  |  |                       |                        |
|-----------------------------------|--|--|-----------------------|------------------------|
| <b>CHAPTER</b><br>Human Resources |  | <b>CHAPTER</b><br>06   | <b>SECTION</b><br>001 | <b>SUBJECT</b><br>0030 |
| <b>SECTION</b><br>Personnel       |  | <b>SUBJECT</b><br>Personnel: Employee Performance Review and Development |                       |                        |

2. Reviews the Employee Training Worksheet and the Employee Orientation Worksheet for completion. See Administrative Procedure #06-002-0006, Employee and Student Orientation & Training.
3. Reviews the Functional Job Task List.
4. Completes a 90 day review for transferred or promoted employees, and reviews with the employee.
5. Completes employee performance notes and Remediation Plan, if a Remediation Plan is required.

#### **Supervisor/Employee**

6. Completes sign-off area, and, if applicable, Remediation Plan Development sign-off area.
7. Consults with own supervisor about retaining or releasing the employee.

#### **Supervisor**

8. Provides the employee, prior to the day of the completion of probationary period or trial period (see Standards B. 2, 3 and 5), with a letter of satisfactory completion (form #0734 available in Forms Index) or with a letter notifying the employee he/she is released from employment (form #0706 available in Forms Index). Refer to Standard B.5 and Union Contracts if trial period unsuccessful.
9. Forwards a copy of Transfer FJTL and performance review to the new Supervisor.

### **C. Annual Performance Review**

#### **Supervisor**

1. Schedules a mutually convenient date and time for performance review.

#### **Supervisor and Employee**

2. Reviews the evaluation and competencies and employee performance notes, encouraging mutual dialogue and open mindedness; adds comments where appropriate.

#### **Supervisor**

|                                   |  |  |                       |                        |
|-----------------------------------|--|--|-----------------------|------------------------|
| <b>CHAPTER</b><br>Human Resources |  | <b>CHAPTER</b><br>06   | <b>SECTION</b><br>001 | <b>SUBJECT</b><br>0030 |
| <b>SECTION</b><br>Personnel       |  | <b>SUBJECT</b><br>Personnel: Employee Performance Review and Development |                       |                        |

3. Completes, submits and dates the FJTL
4. Ensures the employee reviews and acknowledges the performance review.

#### **Supervisor's Supervisor**

5. Reviews any submitted Supervisor Feedback Forms (form #0729 available on the server), if applicable.

#### VI. REFERENCES:

None Available

#### VII. EXHIBITS:

None Available

#### VIII. REVISION HISTORY:

Dates issued 04/88; 03/91; 06/93; 01/97; 05/97; 01/99; 04/01; 06/05; 08/07; 06/08; 06/10; 08/11; 11/12; 01/14; 01/15; 01/16; 01/17; 01/18; 01/19; 01/20; 01/21; 11/21; 11/22.