

CITY OF LOWELL PERFORMANCE EVALUATION

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What is Performance Evaluation?

- Performance evaluation is a process of assessing a person's work performance against a set of pre-determined criteria and discussing that appraisal directly with the person at periodic intervals during the year. It is important that the appraisal focus on the individual's *actual performance on the job*, what the person does or does not do and how well it is done, not on personal characteristics or traits.

What is Performance Evaluation?

- Primarily, an evaluation process is a communication tool. It is a two-way conversation about goals, priorities and expectations and measuring progress.

Why do we do a Performance Evaluation?

- To ensure that both the employee and supervisor(s) have a clear understanding of what is expected in terms of job performance, what standards or objectives are to be pursued and how they relate to the employee's job.
- To encourage a dialogue between the two parties about the employee's overall performance pattern. The purpose of the dialogue is to allow for the direct recognition of achievements and strengths, as well as the identification of areas needing improvement.
- The performance appraisal process provides a system for the comprehensive and on-going communication of expectations and instruction, not simply the completion of a form.

Components of Performance Management

Organization's Mission, Goals, and Department Strategic Plans

Provide the context for performance management so that individual performance is aligned with the organization's mission and goals

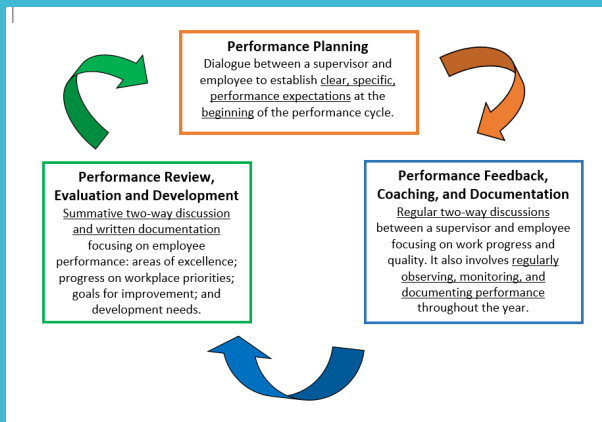
Performance Review

Evaluation and Development Summative two-way discussion and written documentation focusing on employee performance: areas of excellence; progress on workplace priorities; goals for improvement; and development needs

Performance Feedback

Coaching, and Documentation Regular two-way discussions between a supervisor and employee focusing on work progress and quality. It also involves regularly observing, monitoring, and documenting performance throughout the year.

Performance Planning



- Align job expectations/ set goals
- Establish and agree upon performance expectations
- Clarify success criteria
- Provide feedback
- Set the stage for continuous documentation
- Clarify next steps and responsibilities

Factors to be evaluated in the Collins Center Recommended Evaluation Tool

- **Performance Categories**
 - Leadership
 - City Council Relationships
 - Management
 - Community Engagement
 - Equity and Inclusion
 - Culture
 - City Operations
 - Fiscal Management

Annual Goals

- The Evaluation Tool includes the ability to set a goal for each one of the factors to be evaluated.
- It is important the goals be SMART goals
 - **S**pecific
 - **M**easurable
 - **A**chievable
 - **R**elevant
 - **T**ime bound

The Collins Center will work with the parties to review and establish the agreed upon language of the goals.

Assessment

Each of the Council Members will assess the performance, identifying how the employee has performed using the following ratings

- Exceeds expectations
- Met expectations
- Partially met expectations
- Did not meet expectations

Each of the Council Members be asked to identify

- Areas of strengths and accomplishments
- Areas for growth and development

Evaluation Tools

The tools/ assistance provided include:

- Sample language for writing evaluative language
- Guidelines on writing SMART goals
- Tips on evaluating the entire period, not just the recent
- Collins Center support throughout the entire first year

Sample of Guidelines

- Prepare for the review
- Have clarity of forms/requirements
- Advice on evaluations:
 - Specific examples
 - Objectivity
 - Comments should be descriptive and succinct
 - Avoid personal judgement
 - Invite employee input
 - Preferences non the upcoming review
 - Avoiding the “Horns” and “Halo” bias
 - Avoiding the “most recent” bias

Evaluation Tool

- The following slides show the form

Areas to Evaluate – Sample broad guiding principles
Leadership: Effectively carry out the vision and direction set by the City Council including through development of goals and strategies as well as work closely with the Council to lead the City through significant events and crises
City Council Relationship: Establish a collaborative and transparent working relationship with the City Council
Management: Develop a strong City organization that has the people, processes, and systems to deliver on day-to-day operations and existing and new initiatives
Community Engagement: Proactively communicate with the community, and create a range of opportunities for all stakeholders and residents to provide input and feedback, particularly communities whose voices are not typically heard by City Hall
Culture: Define and establish a healthy culture across the City that fosters collaboration, trust, empathy, and effective and efficient decision making
Equity & Inclusion: Advance anti-racism, diversity, equity, and inclusion efforts across the City, including strategy, organizational culture, HR, policy development, and service delivery
City Operations: Oversee effective delivery of resident services including day-to-day operations, maintaining city infrastructure, and major capital projects
Fiscal Management: Provide effective financial management and oversight of the budget, ensuring fiscal stability while allocating resources to meet community needs

Goals/Measurements – specific SMART goals
Leadership
City Council Relationship:
Management:
Community Engagement:
Culture:
Equity & Inclusion:
City Operations:
Fiscal Management:

Lowell City Manager Overall Performance Assessment

The City Council will provide an overall rating and high-level summary that synthesizes feedback on performance.

- 4=Exceeds Expectations,
- 3=Met Expectations,
- 2=Partially Met Expectations,
- 1=Did Not Meet Expectations

The City Council will provide narrative explanations of the ratings

Form on next slide

Overall	Rationale

Areas of Strength and Accomplishment	Areas for Growth and Development

Signatures		
City Manager		Date:
Chair, City Council Sub Committee for Performance Review Process		Date:

Process Moving Forward

- The sub committee will review
- The full council will receive the sub committee report
- The Collins Center will work with the sub committee to fine tune the evaluation tool, timelines, process and logistics
- The Collins Center will provide a workshop for parties to review guidelines, expectations and process .

