County of Riverside

Performance Management Guidebook

RIVCO TALENT

Revised October 2024 | Version 3

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How to Utilize the Guidebook

Welcome, and thank you for accessing the County of Riverside's Performance Management Guidebook. Utilize this document as a resource for:

- The County of Riverside's Performance Management Framework & Philosophy
- Information on the County of Riverside's Competency Model
- Your role in the Performance Management Process as a Manager or Supervisor
- Performance Management Best Practices
- Information on Riverside County's Performance Management System, RivCo Talent Performance
- Step by Step Instructions for Completing all Important Functions in the System
- Tools, Tips, and Tricks on the System
- Answers to Frequently Asked Questions (FAQ's)
- Links to useful resources, templates, and additional training topics
- ...and much more!

County of Riverside Performance Management Framework & Philosophy

What is Performance Management?

"An ongoing, continuous process of feedback, coaching, and communication between a manager and employee to ensure clarity around job responsibilities, priorities, performance expectations, and development planning, to optimize an individual's performance and ensure alignment with organizational strategic goals, to cultivate a high-performing public service organization."- Board Policy C-21

Performance Management Terms

- **Performance Evaluation**: Also referred to as a performance appraisal, performance review, development discussion, or employee appraisal, is a method by which the job performance of an employee is formally documented and evaluated, usually on an annual basis.
- **Performance Management Cycle**: The ongoing 4-stage process of managing the performance of employees. (Plan, Act, Track, Review)
- **Performance Management System**: One tool used to manage and assist in the development and reporting of performance.
- **Competency Model**: A set of competencies that collectively defines the requirements for effective performance in a specific job, profession, job level, or organization.

Board Policy C-21

County of Riverside Board Policy C-21 dictates that department managers must prepare a written, confidential evaluation of the performance of each regular employee assigned to their management responsibility. Additionally, the policy:

- Dictates frequency and components to be included in a performance evaluation
- Ensures employees perform at required levels to provide quality service
- Improves communication between management and employees, and encourages ongoing feedback
- Stipulates that any overall "Unsuccessful/Needs Development" rating must be reviewed and approved by Employee Relations prior to issuance and must be accompanied by an approved Performance Improvement Plan
- To view Board Policy C-21, click HERE.

County of Riverside Competency Model

Competency Model Overview

Competency: A cluster of highly interrelated attributes, including knowledge, skills, and abilities (KSAs) that give rise to the behaviors needed to perform a given job effectively. Competencies can be either technical or behavioral.

- **Technical competencies** reflect the knowledge required to perform a specific role.
- **Behavioral Competencies** describe the KSAs that facilitate the application of technical knowledge to job-related behavior.

In other words, technical competencies reflect what knowledge employees apply to their jobs, and Behavioral Competencies reflect how they apply this knowledge.

Competency Model: A set of competencies that collectively defines the requirements for effective performance in a specific job, profession, job level, or organization.

Why Utilize a Competency Model?

The use of a County-wide competency model that assists us with aligning many stages of the employee life cycle to assist with:

- Recruitment and selection, including clear competencies for job level and competency-based interviewing
- Onboarding and setting clear expectations and the competencies needed to help employees be successful
- Employee and leadership development and career planning
- Assistance for those who are coaching and/or mentoring others – they can easily establish clear goals and activities based on competency development, and assist in creating an environment where regular, ongoing feedback on performance and development is provided regularly
- Performance Evaluations:
    - Expectations and goals are established at the start of the reporting period including pre-determined competencies that are rated at the end of the year.
    - Employees are clear on what they will be rated on and expectations for their role, while managers are able to quickly complete annual performance evaluations without the need to identify the components to include before completing the evaluation itself.
    - The competency model also ensures fair and consistent evaluation components across positions. Employees in the same classifications are rated on the same competencies.
    - Lastly, the County-wide competency model allows the performance team over time to be able to analyze performance data and work with departments to provide information on trends, areas needing improvement, and areas where high performance is occurring. We can study what is occurring and if practices can be implemented elsewhere to improve performance where needed, workforce and succession planning, and much more!

With a County-wide competency model, we have the roadmap to becoming a high-performing public service organization.

Job Levels

The County has adopted a job-level competency model that includes the following 6 job levels:

Clerical/Labor/Trade

Paraprofessional/Technical

Professional

Manager/Supervisor

Department Executive

County Leadership

JOB LEVEL	COMPETENCY CATEGORIES			
	FI: Thought	**F2: Results**	**F3: People**	**F4: Self**
Clerical/Trades/Labor	Customer Focus	Ensures Accountability	Communicates Effectively	Self-Development
Technical/Paraprofessional	Customer Focus	Ensures Accountability Plans and Aligns	Communicates Effectively	Self-Development
Professional	Manages Complexity	Ensures Accountability Resourcefulness	Communicates Effectively	Self-Development
Management/Supervisors	Decision Quality	Directs Work	Develops Talent	Instills Trust
Department Executive *(Including Assistant Directors, Deputy Directors and equivalent executive titles in Departments)*	Department-wide Strategic Mindset	Drives Results	Organizational Savvy	Demonstrates Self-Awareness
County Leadership *(including CEO, CAO, COO, Deputy CEOs, Assistant CEOs, Department Heads)*	Countywide Strategic Mindset (Global Perspective)	Action Oriented	Builds Effective Teams Drives Vision and Purpose	Demonstrates Self-Awareness

Competencies included in the new model come from the Korn Ferry Leadership Architect (KFLA) competency library, which includes 38 competencies.

County of Riverside Managers and Supervisors: Your Role in the Performance Management Process

Overview & Benefits of Effective Performance Management

There are many benefits that result from managers conducting effective performance management. Performing the stages involved in the performance management cycle and conducting regular performance evaluations generally encourages open communication and maintains stronger relationships with employees, which in turn can lead to higher retention rates, greater performance, and an overall positive culture within the workplace.

Four benefits of effective performance management are:

- **Clarifying an employee's role and status.** Performance management helps clarify the employee's role and status in the organization. Some employees like to know where they stand regarding their job performance and want to see what else they can do for their department. Effective performance management also provides valuable insights that supervisors and managers can use to spot talent and identify their staff's training needs.
- **Providing employee self-development.** This is one of the most important benefits for the employee. Effective performance management and evaluations allow you to provide positive feedback as well as identify areas for improvement. An employee can discuss and create a development plan with you, as their supervisor or manager, so they can improve their skills and develop their competencies.
- **Providing a structured process for an employee to approach their supervisor or manager**. Following the performance management cycle allows the employee to have discussions, identify problems, clarify expectations, and plan for the future. It lets both you and your employee set up long- and short-term goals. A system that encourages open communication and regular feedback can have long-term positive impacts on supervisory or manager and employee relationships.
- **Lastly, effective performance management can provide increased job satisfaction and motivation.** It helps to encourage your employees to better themselves and offer specific steps for improvement. Focus on the positive and show your team how to build on those strengths. A powerful way to increase job satisfaction is to give employees something to look forward to in the future. Helping employees plan for the long term shows them that you're committed to their success and you're willing to invest in them and their future.

The Performance Management Cycle

- **PLAN:** Identify and clarify goals, role expectations, and competencies. What does success look like? Utilize SMART goals to identify both performance and developmental goals. See the "Managing Employee Goals" section in the following pages for information on creating SMART goals. Discuss and help employees understand competencies. What are they and how do they relate to performance and evaluation?

- **ACT:** Set employees up for success while they perform responsibilities within their role and work toward achieving their goals. This stage may include orientation and onboarding, education and training, mentoring, career development, and any other programs and services available that will set your employees up for success. Providing all this to your employees will lead to improved productivity, engagement, increased employee retention, and encourage new ideas, open communication, and trust. When you provide a genuinely supportive work environment, and take meaningful steps toward their professional development, you all but ensure that the employee will succeed and thrive.

- **TRACK:** Once you've set goals and objectives and provided everything necessary to achieve them, continually track employee progress and provide regular, ongoing feedback and coaching. In this stage, you'll hold the employee accountable for meeting deadlines and achieving milestones; recognize accomplishments; proactively address problems and help solve challenges; mitigate unforeseen obstacles; and acknowledge and accommodate any shifts in organization priorities. Throughout the year, ensure you:
    - Provide ongoing coaching and feedback
    - Hold regular 1:1 Meetings
    - Document, document, document!

- **REVIEW:** This stage focuses on the end-of-year employee evaluation. To ensure compliance with Board Policy C-21, managers must prepare and present documented performance evaluations on an annual basis, approximately on the anniversary date of initial employment or promotion entry.
    - This is the time for summarizing and highlighting an employee's contribution over time; formally recognizing and celebrating accomplishments; considering further training and development ideas; discussing opportunities for advancement; and so on. It's key to stay as consistent, fair, and unbiased during reviews as possible; remain constructive and objective in your feedback; use clear and concise messaging; encourage and facilitate a two-way dialogue; and always involve the employee in decision-making.
    - The County's 3-point rating scale for performance evaluations is as follows:
        - **Exceptional**: Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of the department and the County of Riverside. Steps outside of existing responsibilities to add value to the work group and/or department. Employee demonstrated role model behaviors.
        - **Successful**: Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of the workgroup, department, and the County of Riverside. Performance consistently met the demands placed upon the position. Required minimal supervision and complied with work rules and regulatory requirements.
        - **Unsuccessful/Needs Development**: Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.

For more information on your role in the performance management process as a county supervisor or manager, take our on-demand Performance Management training! Access this on-demand training by clicking the link below:

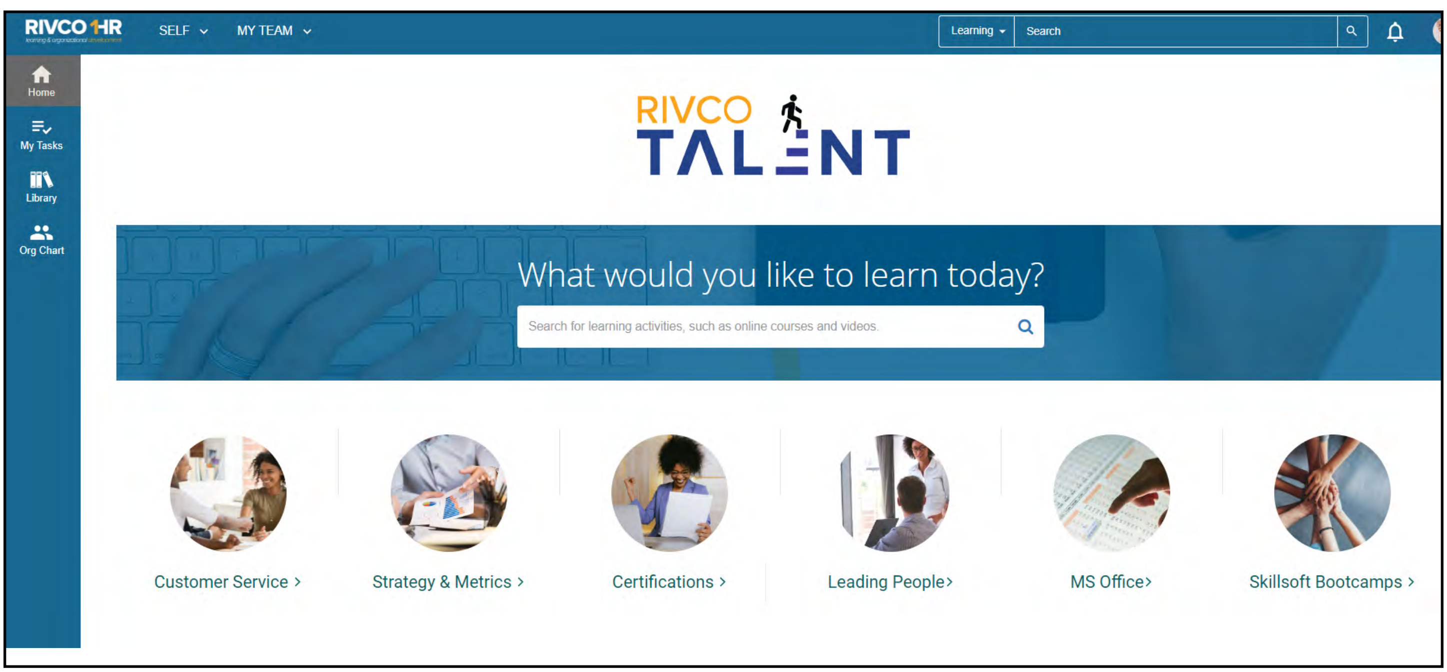
RivCo Performance Management

Overview of RivCo Talent Performance Management System

The County of Riverside utilizes RivCo Talent as its performance management system. RivCo Talent helps the County of Riverside as an organization continually develop and improve our workforce by providing a comprehensive, integrated set of tools for measuring employee performance, tracking goals, and fostering continuous development.

Components of the performance management system that will be detailed in the subsequent sections of this guidebook are as follows:

- **Getting Started:** Log in to the system and familiarize yourself with its general navigation.
- **Managing Employee Development Plans:** Create and track development plans for yourself and your staff. Development plans are an optional tool and are not rated in the evaluation but can be used as a component of the evaluation form to help justify competency rating.
- **Managing Employee Goals:** Utilize the system to create, track, and assess your employee's professional and developmental goals for the current and upcoming review periods.
- **Completing Employee Evaluations (Including the Performance Improvement Plan, or PIP, Process):** Complete your employee's annual evaluations in the system. Should you rate an employee as "Unsuccessful/ Needs Development," the Performance Improvement Plan, or PIP, the process will be initiated in the system. Components of a standard employee evaluation in the system are competencies, goals, development plan, year-end rating, and signature. Review the "Completing Employee Performance Evaluations" section of this guidebook for more information on the components of an evaluation in the system.
- **Continuous Feedback:** Request and provide continuous feedback in the system. Create 1:1 journals between managers and direct reports to maintain a constant stream of continuous feedback throughout the performance management cycle.
- **Notes Functionality:** Track employee accomplishments, one-on-one meeting notes, or anything you'd like to include in an evaluation using the "Notes" feature in the system. All notes saved throughout the year can easily be accessed and pulled into an evaluation form! *Important note* Please check with your department to ensure there are no policies around maintaining private notes prior to utilizing this function.



Important System Terms & Definitions

RivCo Talent: RivCo Talent (formerly known as CORLearning) is the County of Riverside's system for learning and performance management and includes the SkillSoft Online Learning Library.

"My Team" tab: If you are a manager or supervisor and have employees who report to you in the system, you will have the "My Team" tab. Utilize the "My Team" tab to view your employee's development plans, as well as their progress on them.

"Self" tab: Use the "Self" tab to access important learning and performance features, such as your upcoming training, goals, and development plans. Access the "Self" tab on the top-left-hand side of the screen.

Quick Links: Found at the top of the "Self" and "My Team" tab to locate all Performance tools. These links provide easy access to the performance functions used most in the system.

My Tasks: Use your "My Tasks" tab to act on or review any task assigned to you - current, overdue, or future. The timeline lists current and overdue items first, so you can easily find and accomplish your most critical tasks. Access your timeline by clicking "My Tasks" on the left-hand side of the screen.

Task: Let's face it, if you have an assigned task you want to be able to get in, complete the task, and get out as quickly as possible so you can get back to your normal duties. Thankfully, our system makes it easy for you to see what's assigned to you and complete these tasks. A task is assigned in the system to alert you that you have an item to complete. Access all current, overdue, or future tasks through your "My Tasks" timeline.

Library: Use the SkillSoft Online Learning Library to browse and search for available learning activities in the system. You can access the library by clicking "Library" on the left-hand side of the screen, under your "My Tasks" tab.

Org Chart: Manager/supervisors can use the Org Chart to access all direct and indirect reports. Access links to view employees' performance assessments, timelines, and continuous feedback.

Getting Started

Utilize the information below to initially log in to the system and familiarize yourself with the general navigation, including how to view and update your profile in the system. The tips, tools, and tricks section below contains useful information when initially familiarizing yourself with the system, as well as who to contact should you experience any difficulty or require any additional assistance.

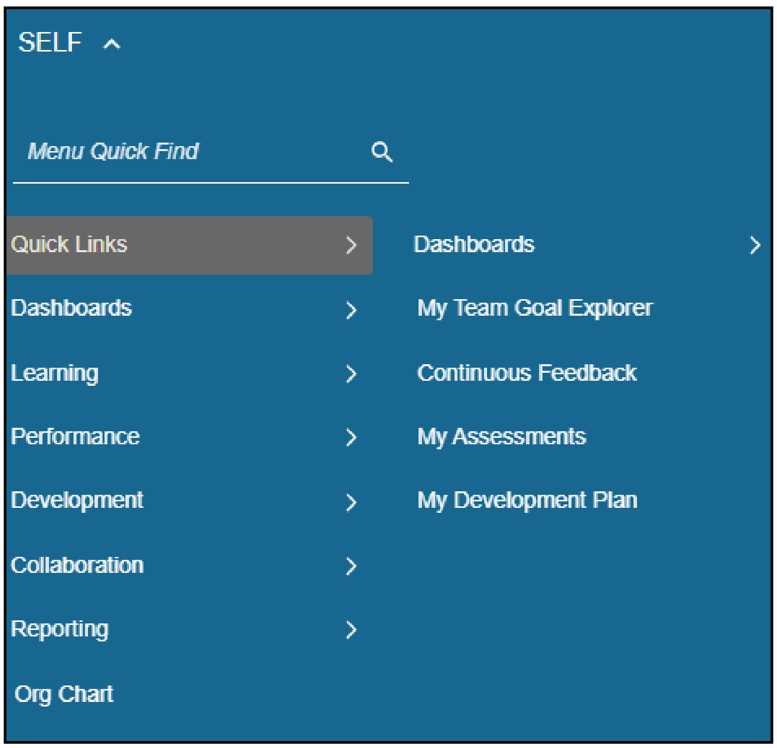
Log in to the system:

- Navigate to https://corlearning.sumtotal.host/
- When accessing the system through the County network, you will be signed on via Single Sign On (SS0).

Click HERE to access RivCo Talent

General navigation:

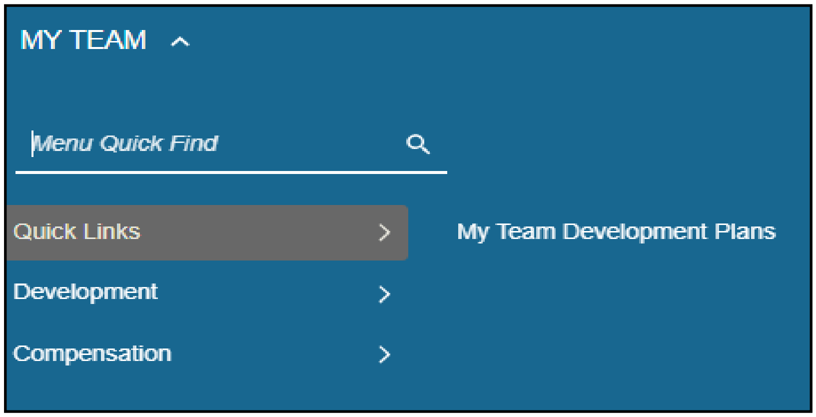
- Navigate to the “Self” tab on the top left-hand side of the screen. Here, you will find the following menu options:



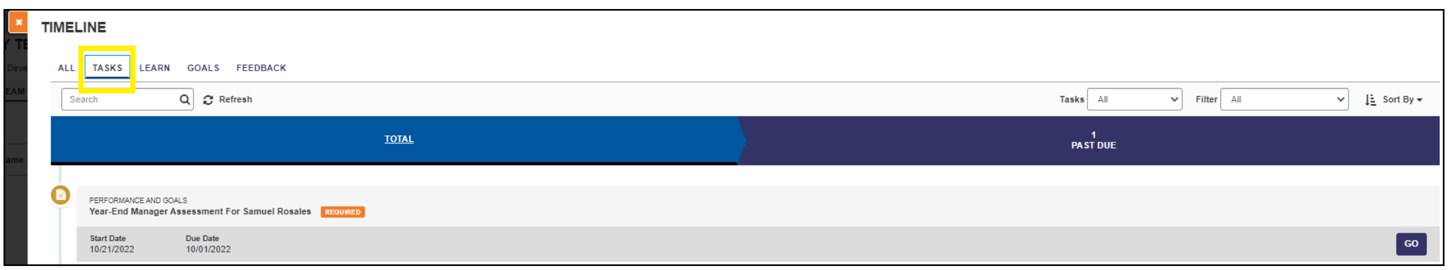
- Utilize the Quick Links menu to:
    - Access performance-related features.
- Utilize the Dashboards menu to:
    - Access the RIVCO Talent Dashboard.
- Utilize the Performance menu to:
    - Access your own performance evaluations,
    - your own goals, and goal explorer to access your employees’ goals.
- Utilize the Development menu to:
    - Access your own development plan.
- Utilize the Collaboration menu to:
    - Access the Continuous Feedback tool.
- Utilize the Notes tab to:
    - Access your notes for self or direct reports,

General navigation (continued):

- Navigate to the "My Team" tab on the top left-hand side of the screen. Here, you will find the following menu options:



- Utilize the Development menu to:
  - o Access your team's development plan.
- Navigate to the "My Tasks" on the left-hand side of the screen.
  - o Click on "Tasks"
  - o If a performance evaluation for a direct report is due or if you're an employee and you need to review and acknowledge your evaluation, it will populate as a task in your timeline. Click "Go" on the bottom right-hand side of the screen to launch.



Getting Started Tips, Tools, and Tricks:

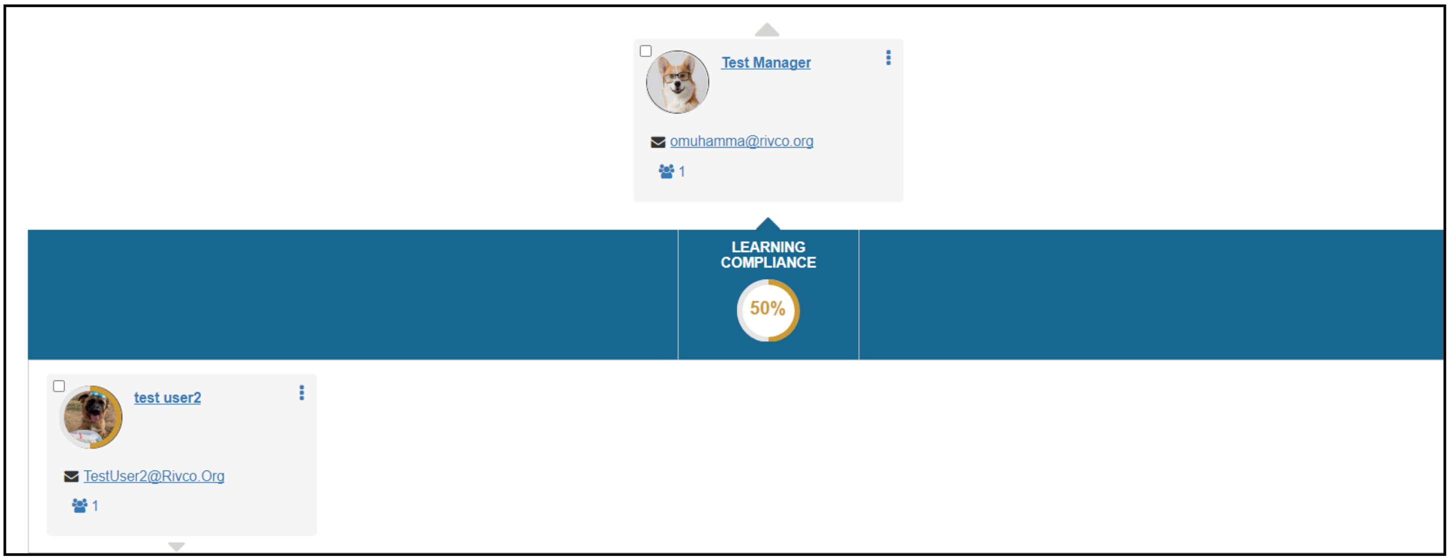
- If you do not have access to the system or need help with your login user ID or password, please contact the IT Help Desk at 951-955-9900.
- RivCo Talent Performance runs best when accessed via the Chrome internet browser.
- New employees will be granted access to the system within approximately two weeks of their hire date.
- Your "Profile" is a specialized dashboard where you can view important information related to your assigned tasks, work history, anniversary date, and any direct reports. To access your profile, click your profile photo.
- Information in the system is populated through PeopleSoft. Information is refreshed on a nightly basis. If any of the information that has already been pre-populated is incorrect, please contact PerformanceMgmt@Rivco.org.

Org Chart

The Org Chart feature can be accessed by clicking on the "Org Chart" icon under "Library" on the left-hand side of RivCo Talent. The Org Chart allows you to quickly access your direct reports, drill down through your chain of command, and get a quick overview of completed evaluations and learning activities within your team.

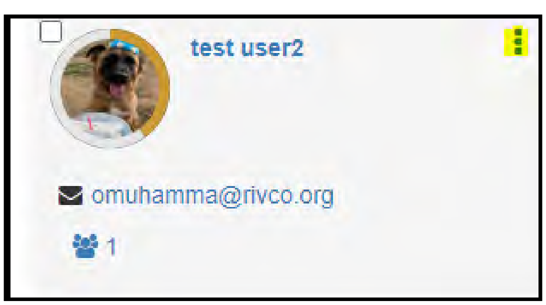
- Start by clicking on the Org Chart icon: 

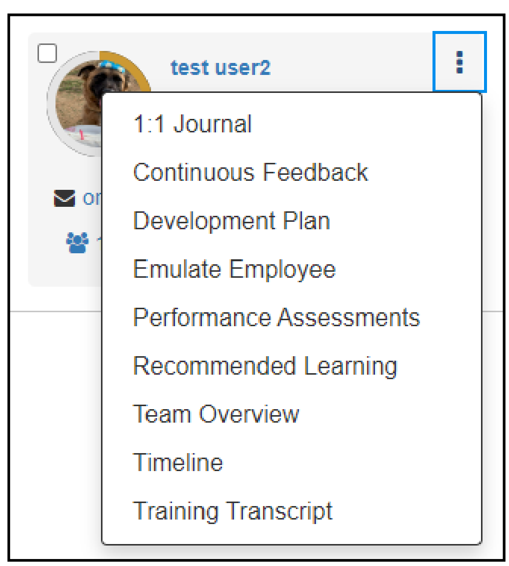
- This will open your organizational chart which gives you immediate access to your direct reports:



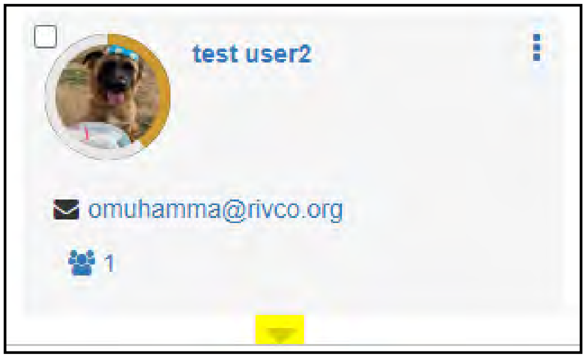
- The "Learning Compliance" metric shows you the percentage of your learning activities, both mandated and assigned, that have been completed by your team:

- Clicking on the three dots alongside your employee's name allows you to access their links:

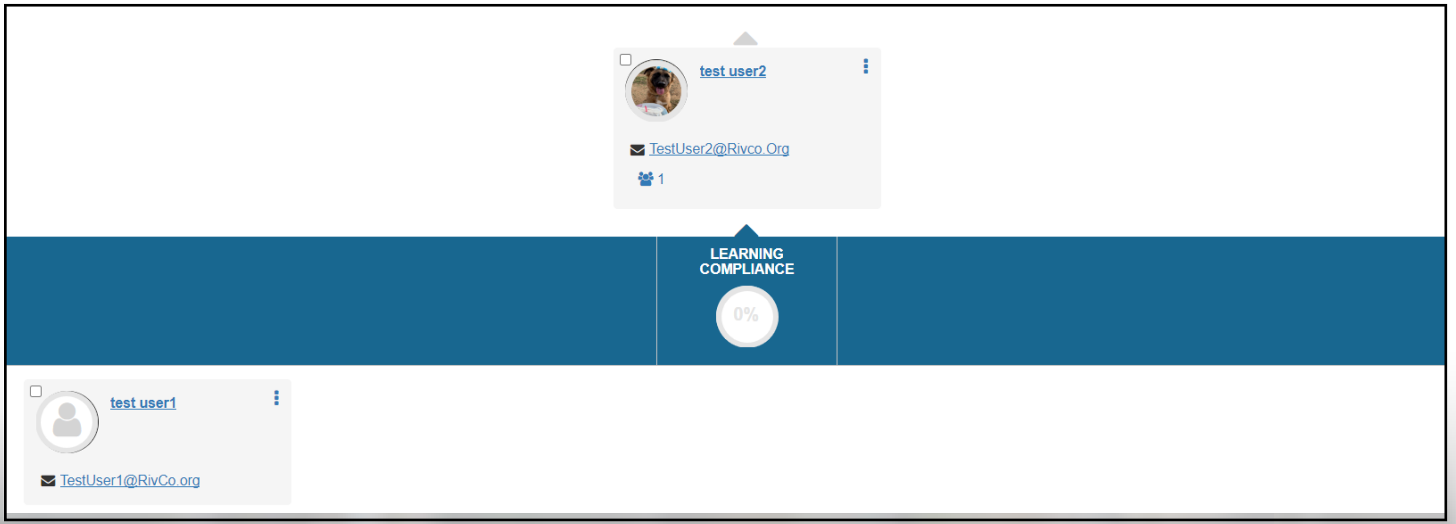




- If you have indirect reports, you can click on the arrow below your staff to drill down:

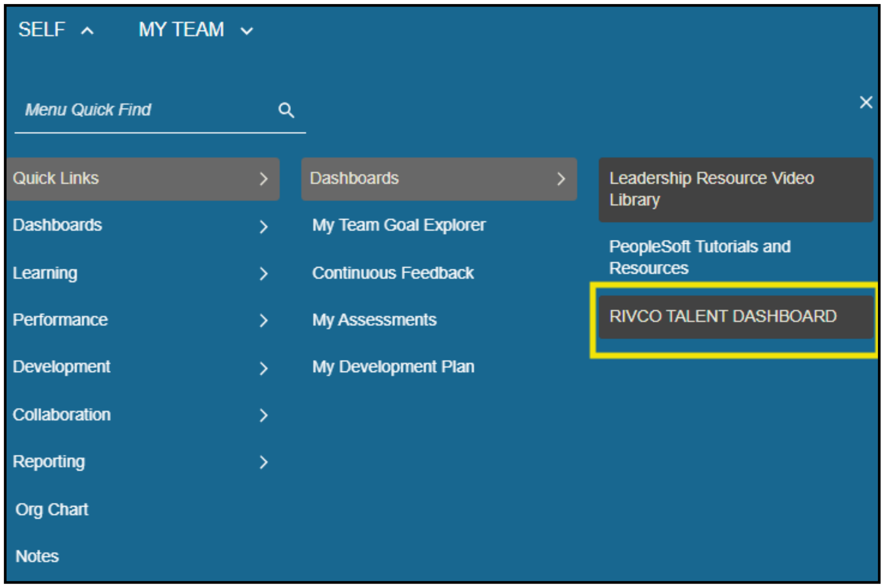


Here, you will be able to access your indirect report's.



System Reports

Begin by going to the **SELF** tab at the top of the screen. Click on the **DASHBOARD** option. Once you click on Dashboard, select **RIVCO TALENT DASHBOARD** from the side menu that pops up. From here you will be taken to the reports Page.



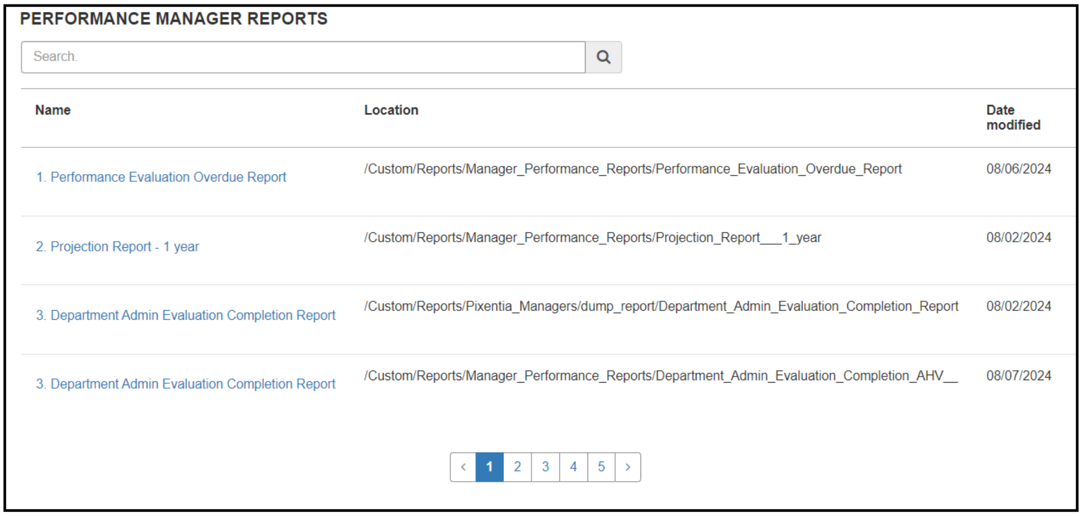
On the Dashboard page, you will have a list of your direct reports available on the left side of the screen, where you can access their goals, development plans, and continuous feedback. At the top of the page, an overdue and projected evaluation report will automatically run for your direct reports and indirect reports.

Please note that Tasks in RivCo Talent remain with who they are assigned to until they are either completed or transferred. If an employee's manager changes after their evaluation is generated in RivCo Talent, the evaluation will remain with the prior manager. This will be indicated by the "Assigned To" column on either report. If you see that an evaluation is assigned to an employee's previous manager, then contact your department's performance administrators and they will be able to assist with transferring the evaluation to you. If you need to know who your department's performance administrators are, please contact the Performance Management team (performancemgmt@rivco.org). Evaluations in RivCo Talent will remain overdue until the employee completes their acknowledgment and finalizes the process.

The overdue report and the 1-year evaluation projection report will automatically run for your direct reports and indirect reports. The projected report will show all upcoming evaluations due in the upcoming year and their due dates based on the employee's current job-entry date.

Please note that evaluations in RivCo Talent will generate and will be available to work on 60 days prior to the due date indicated on the projection report.

Further down on the dashboard, we have the "Performance Manager Reports" widget which allows you to run reports as needed. These reports include the Overdue Evaluation Report, Projection Report, Canceled Evaluation Report, and Evaluation Completion Report.



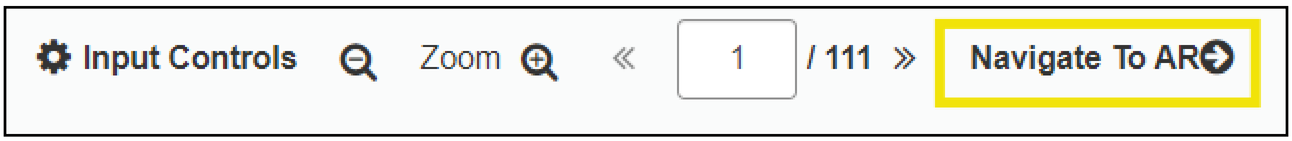
PERFORMANCE MANAGER REPORTS

Search.

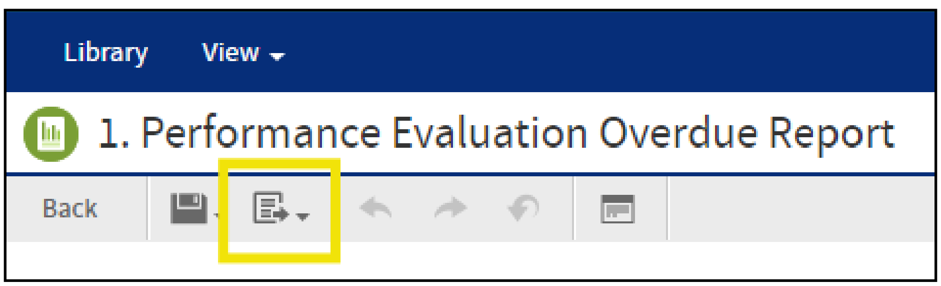
Name	Location	Date modified
1. Performance Evaluation Overdue Report	/Custom/Reports/Manager_Performance_Reports/Performance_Evaluation_Overdue_Report	08/06/2024
2. Projection Report - 1 year	/Custom/Reports/Manager_Performance_Reports/Projection_Report___1_year	08/02/2024
3. Department Admin Evaluation Completion Report	/Custom/Reports/Pixentia_Managers/dump_report/Department_Admin_Evaluation_Completion_Report	08/02/2024
3. Department Admin Evaluation Completion Report	/Custom/Reports/Manager_Performance_Reports/Department_Admin_Evaluation_Completion_AHV__	08/07/2024

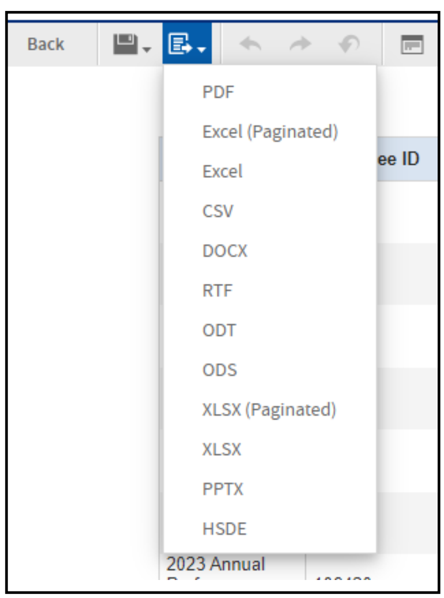
1 2 3 4 5

If you would like to export a report, start by clicking on the name of the report. Once the report loads, click on "Navigate to AR" on the top right corner of the screen.



This will run the report once more in the advanced reporting view. Hover over the "Export" feature and choose the format in which you want to export the report. The report will then be downloaded onto your computer.





Managing Employee Goals

This section is optional in the system: One of the most critical tools of a performance process is the assessment of an employee's goals for the year. Goals are added to the system to track the status or completion, they are automatically populated to the employee's performance evaluation for the selected Goal Period year.

Goal Period refers to the evaluation period that the goals will appear for the employee. Example: if it is 2024 and the employee has already received their 2024 evaluation then you will want to schedule next year's goals for 2025. The goals created for the 2024-2025 assessment period will populate on the employee's 2025 evaluation.

To change the Goal Period to reflect the correct evaluation year, click on "Filter By", hover over "Period" and select the correct Goal period.

Each goal generated in the system helps to identify the specific, targeted goals that the employee is expected to meet for the year. Both employees and their managers can add goals for a current review period. Goals are only visible to the employee and their chain of command (manager/supervisor and above).

Sample Goal Plan:

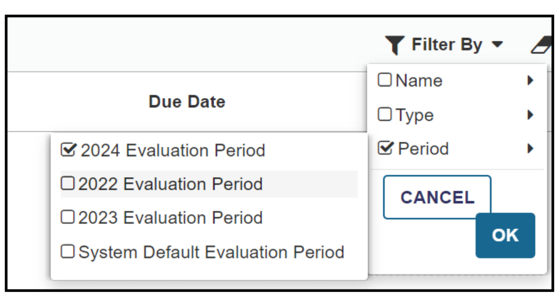
Managing Goals Tips, Tools, and Tricks

- Goals are not rated on the evaluation. They are visible on the Evaluation to show what goals were worked on and what will be worked on in the next Goal period.
- To change the Goal Period to reflect the correct evaluation year, click on "Filter By", hover over "Period" and select the correct Goal period.
- You can align your Goals to your Manager or Organization if they are available.
- You can share your goals with your team, this would enable them to align their goals with yours.

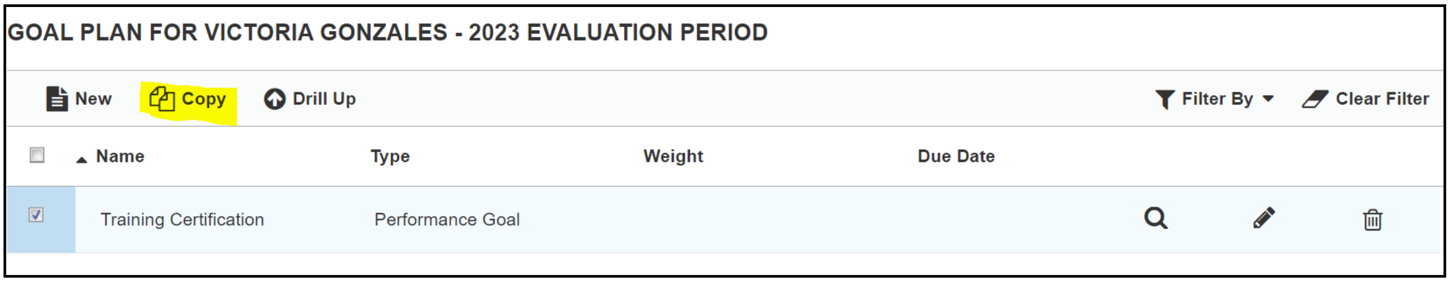
Create a Goal

To view your Goal Plan or create a new goal, perform the following:

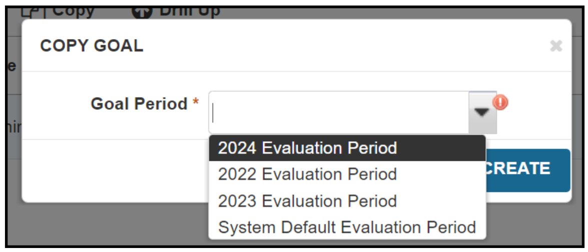
- Under the "Self" tab on the top left-hand side of the screen:
    - o Navigate to Self -> Performance -> My Goals
- To create a goal for an employee, navigate to Self-> Performance -> My Team Goal Explorer. All of your direct reports goal plans will be displayed here. Select the employee to whom you will be assigning a goal to.
- By default, the current (most recent) evaluation period will be selected for the Goal. Evaluation periods determine which year's evaluation form the goal will populate on. If you want to assign the goal to another evaluation period, select it from the "Filter By" drop-down, and hover over the arrow next to the Goal Period you would like to use.



- If you need to copy a goal over from the previous evaluation period, then select the goal and click "Copy".



  - This will allow you to select the correct evaluation to copy your goal to
  - Example: If you have already received your evaluation for the 2023 year, then you will need to select the 2024 evaluation period to ensure your new goals appear on your next evaluation.



- By default, the "Target Recipient" is the employee from whose Goal Plan you accessed the Goal Details page. If you want to assign the goal to another user, click the icon and use the Employee Selector to select the employee.
- Required field: Enter a name for the goal, as it will appear in the employee's Goal Plan and any other Talent forms that use the goal (such as the Goals section of an evaluation form).
- Required field: Enter a detailed description of the goal, including specific objectives and any metrics.
- As the goal period progresses, you can edit the goal and use the "Results Achieved" field to include any results that the employee has achieved toward completing the goal.
- If the goal is weighted and will be rated against other goals, you may use the textbox under "Weight" to indicate the weight of the goal. This is optional and not required to create a goal.
- Specify a Start Date and End Date for when you expect the goal to be completed (not required).
- Required field: Select a Completion Status and Percent Complete for the goal.

When you are finished configuring the personal goal, perform the following:

- Click "Save" To add the goal to the employee's goal plan for the selected evaluation period.

Utilize the SMART Goal Wizard

You can use the SMART Goal Wizard, which asks you a series of questions that will help you determine an appropriate goal, based on goal metrics and the expected outcomes. The name and description you enter in the wizard will populate in the goal details applicable fields when you click "Finish."

S.M.A.R.T. Goal

To utilize the SMART Goal Wizard:

- From the "Goal Details" screen when adding a new goal, click "SMART Wizard" at the bottom right-hand side of the screen.
- Enter in the requested information in the pop-up window, similar to the one shown below. Select "Finish" once complete and the SMART Wizard will enter in your new SMART goal to your goal details screen.

WIZARD

CREATE S.M.A.R.T. GOAL

Please answer all the questions below. Then click 'Create S.M.A.R.T. Goal' button to preview the suggested goal.

What is being measured?

Employee

On what aspect?

Training

Goal 'To Do' Action?

Increase

By 'When'?

December

2023

What is the Current/Starting Baseline?

NEW

What are the Expected Results?

ADD CERTIFICATIONS AND TRAINING ENROLLMENT

OUTCOME

Suggested Goal Name

EMPLOYEE DEVELOPMENT 2023

Suggested Goal Description

YEARLY EMPLOYEE DEVELOPMENT GOALS 2023

OUTCOME

Suggested Goal Name

Employee - Training

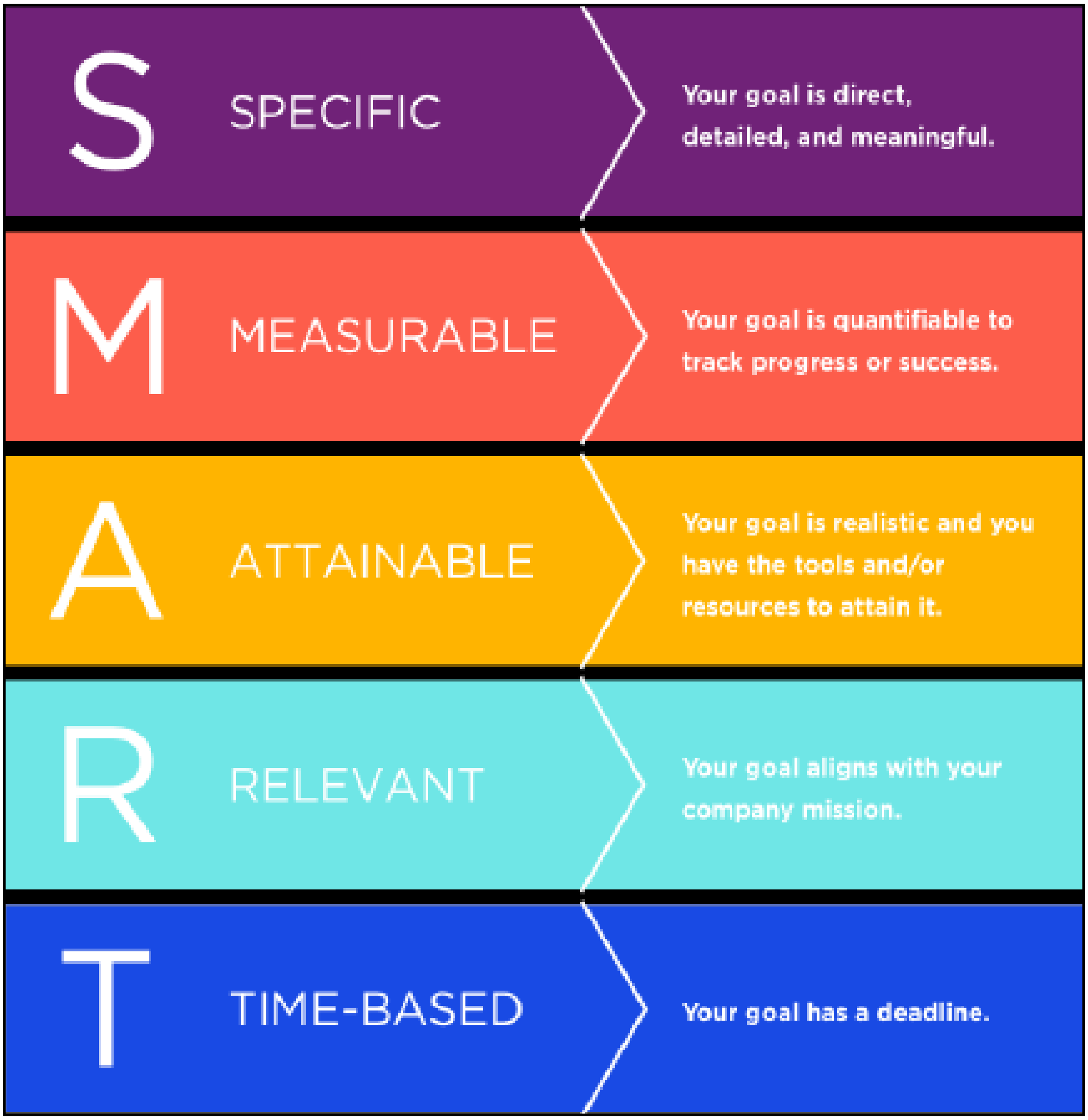
Suggested Goal Description

Increase: Employee - Training
Date: December 2023
Baseline: NEW
Results: ADD CERTIFICATIONS AND TRAINING ENROLLMENT

Creating SMART Goals

Goals setting is an important component of your regular one-on-one meetings and performance reviews with your employees. When working with your employees to formulate goals for the upcoming performance evaluation cycle, ensure you are formulating goals that are SMART (Specific, Measurable, Attainable, Relevant, and Time-based). Using SMART performance goals leaves little to the imagination and provides clear communication between employees, managers, and supervisors. Before you set your goals, you should review the organizational objectives and justify what you can do to contribute to them.

Your efforts will only pay off if you know why you are setting the SMART goals and you align them to the wider organizational goals of the department you work for.



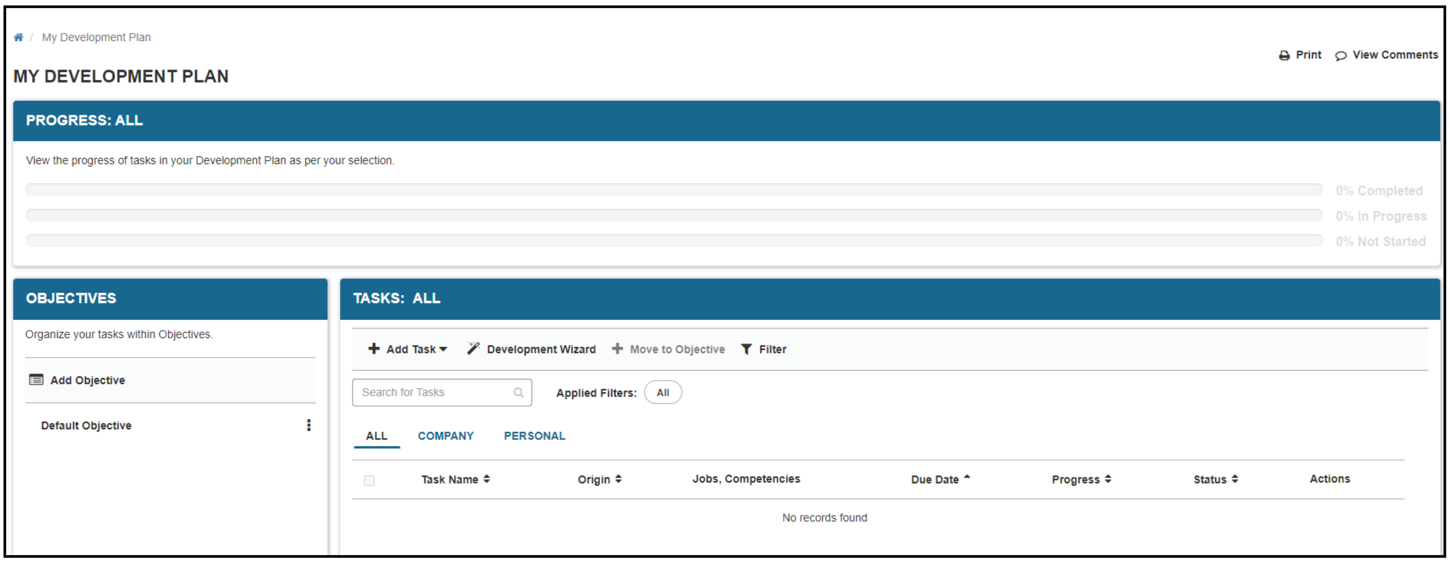
Click HERE for our SMART Goals fillable worksheet!

Managing Employee Development Plans

As an employee or manager, you can use the Development Plan to assemble and track activities and goals that are specially tailored to help you or your employees grow and develop. Depending on current responsibilities and those of any future job, employees may require a different set of abilities. Employees and managers collaborate to create a Development Plan with activities that will help you improve these abilities and become more successful in your career.

Development plans can be created by either an employee or their manager/supervisor. Development plans should, in performance management best practice, be created at the start of the review period (during the Performance Management cycle phase one: Plan) so that there is agreement between both employee and manager/supervisor on the activities, goals, and tasks that will be completed during the review period. Information added to an employee's development plan is populated to their annual performance review form for the selected review year. See the information below for step-by-step instructions on creating a development plan, as well as utilizing the Development Plan Smart Wizard.

Sample Development Plan:



Development Plan Tools, Tips, and Tricks

- Utilize the Development Wizard to create plans based on competencies or aspirational jobs. For more information on the development wizard, please refer to the Development Plan Tutorial available on RivCo Talent, coming soon!
- Add objectives to organize tasks. Create a title and link tasks and learning for easy access for employee and manager.
- Add a "Library Task" by linking to the Learning Management library to access hundreds of learning activities for the development plan or create an "Other Task" and enter in any outside training that will be useful to your team or an individual employee.
- If you are a manager, you can go to the "My Team" tab -> Development -> My Team Development Plans. Here you can create development plans for your whole team instead of adding tasks individually.

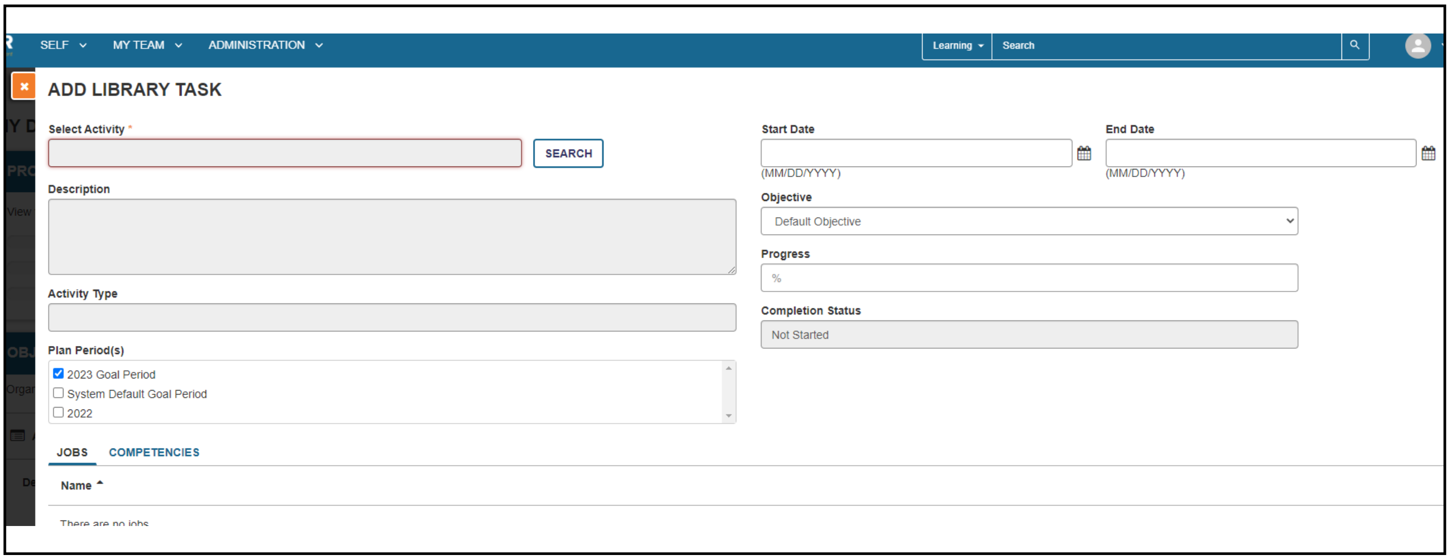
Create a Development Plan

The Development Plan provides an interface where employees and their managers can identify and manage any activities the employee should complete to close any gaps between current capabilities and those of a current or a future position.

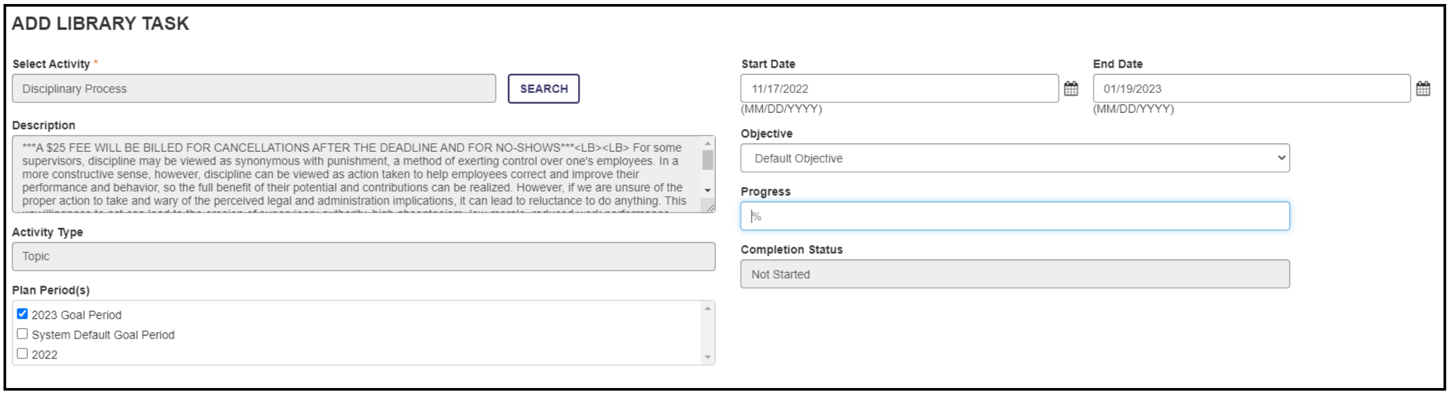
Users can group activities, enabling employees to understand how they are developing, and to target the activities that are most important to their career goals. Key metrics and summaries help users understand how much they have progressed toward their development goals. Special planning tools allow managers and administrators to manage Development Plans for their team or anyone in the organization, respectively - including mass activity assignment, and plan review and approval.

To start a Development Plan, follow the steps outlined below:

- Using the "Self" Menu at the top of the screen, navigate down to Development -> My Development Plan
- Click "Add Task"
- Select "Library Task" from drop-down menu.



- Utilize the search bar to add an activity. Click the "Search" button next to the "Select Activity" bar.
- Enter the name of the activity you would like to add to your Development Plan.
- Select the title of the activity.
- Back on the "Add Library Task" screen, select the Evaluation Period year this activity will be applied to.
- Enter the Start and End dates for this activity. (optional)
- Select an objective to associate the activity to from the Objective drop-down menu. (optional)
- Click "Save" at the bottom of the screen.



Instructor-led activities in the system are any activities, classes, or courses that are scheduled and led by a facilitator or trainer. For any instructor-led activities in the library (Example: Disciplinary Process), you must register for an offering. Select the activity under Tasks, then click the kebab menu under Actions. Or you can access this by going into your development plan under Tasks: All and click the 3 dots under Actions and you can start or register for the course. *Note*: most eCourses and Skillsoft content do not require registration.

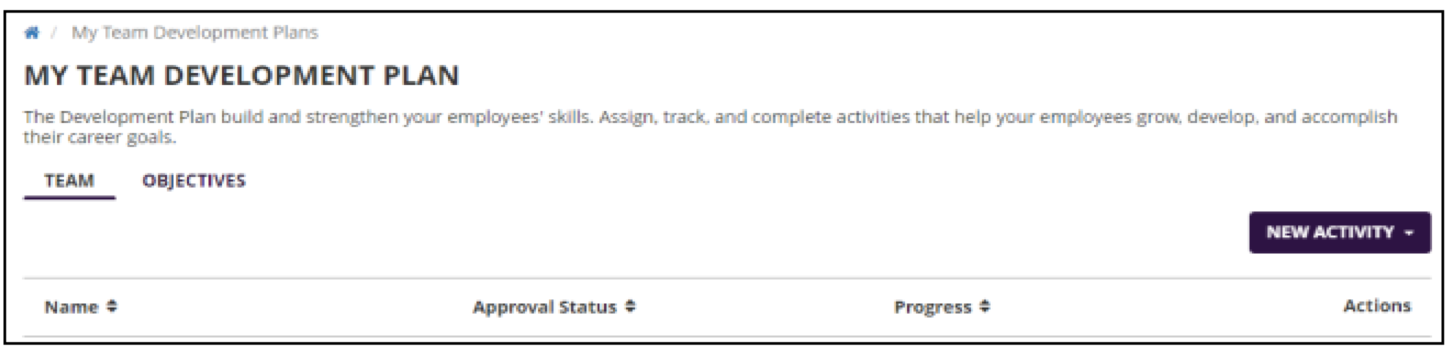
To add an instructor-led activity to your Development Plan:

- Select the instructor-led activity in your search results.
- Click “Register”
- Complete the standard registration process to enroll in the development activity.

Development activities are at the heart of the Development Plan. When included in a Development Plan, these activities help you improve in your current responsibilities, obtain the abilities needed for a future job, and track progress toward earning these abilities. You can assign new activities to yourself, manage these activities, track their completion, and group them by category.

Assign a Development Activity to Your Team

If you want all your direct reports to complete a development activity, you can use the My Team Development Plan page to assign the activity to your entire team. Doing so assigns the activity to each of your direct reports, and you and your employees can track their progress against completing these activities individually as part of their Development Plans.



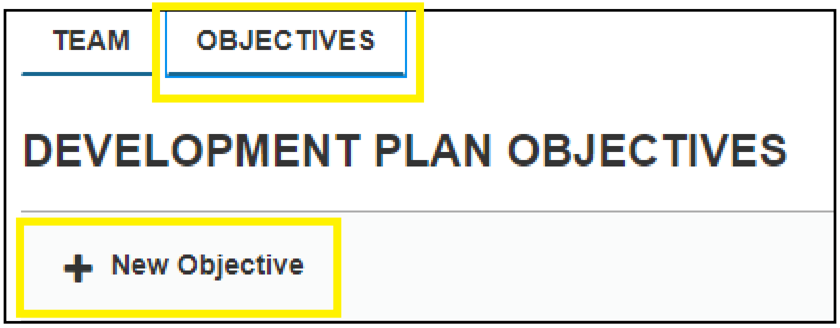
- To assign a Learning Management or Growth activity to all your direct reports, from the My Team Development Plan page, click New Activity and select Catalog/Internal Activity.
- To assign an external activity, such as reading (online or offline), film, and so on, from the My Team Development Plan page, click New Activity and select External Activity.

Quick Tip for Managers: Keep your employee's tasks organized!

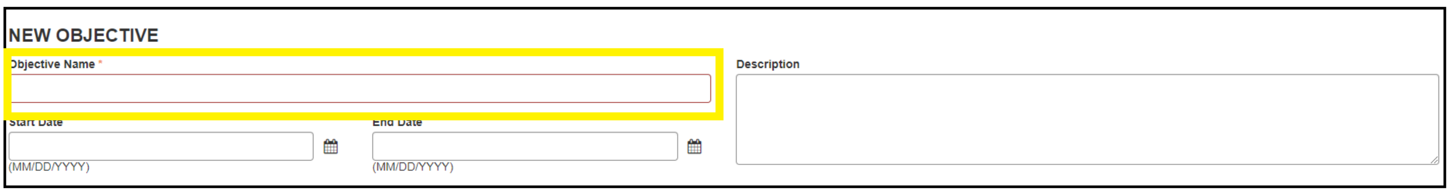
You can set up an Objective to help your employee keep tasks organized in the "My Team" tab.

Open up My Team Development Plans and create an Objective.

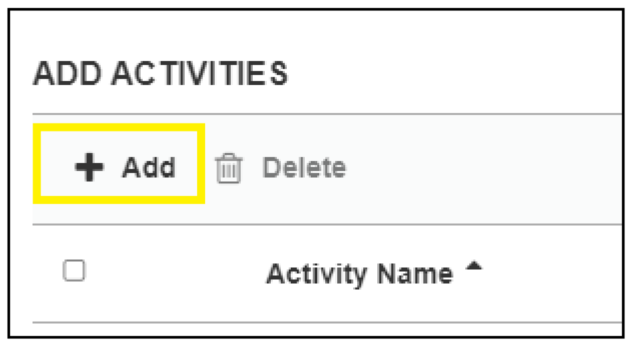
- Click on "Objectives" and click "+ New Objective."



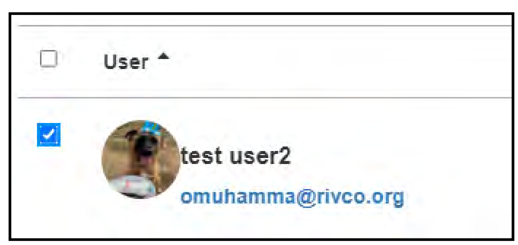
- Fill in the "Objective Name" (required)
- Add a description, start date, and end date.
- Click "Next"



- Select "+Add" to select the tasks you will be adding to the Objective, or you can skip this step and click "Next"



- Select the User (employee) you are creating this objective for by checking the box next to their name.

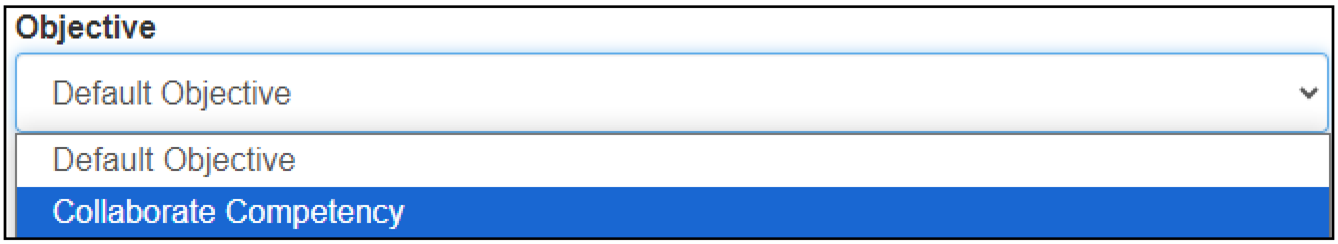


- Once the employee has been selected click "Next" to go to the last screen and click "Save Objective".

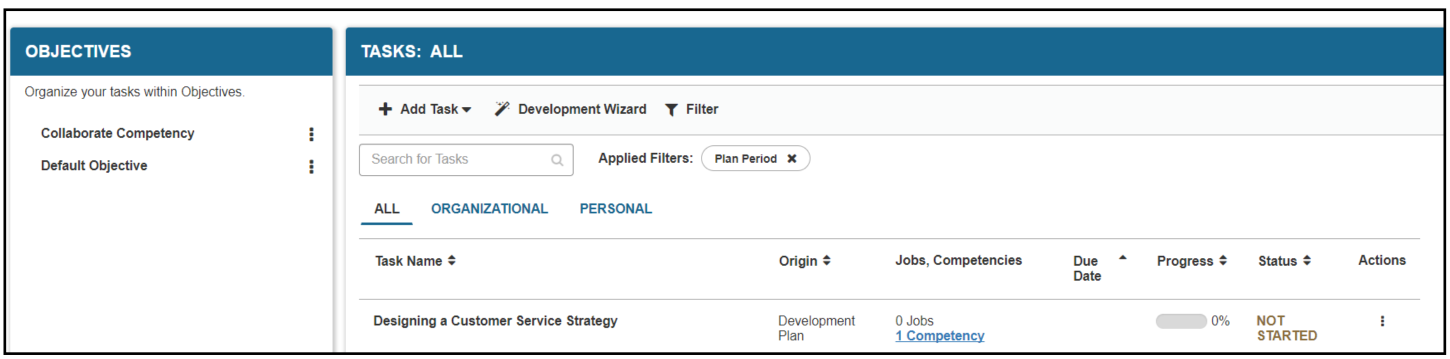
- You are now able to align your employees' tasks with your newly created objective.

- If you already started creating tasks, go to their Development Plan, click the three dots under actions, and click “Edit.”

- Go to the “Objectives” box.
- Click the down arrow and align it with your newly created objective.
- Click “Save” to exit.



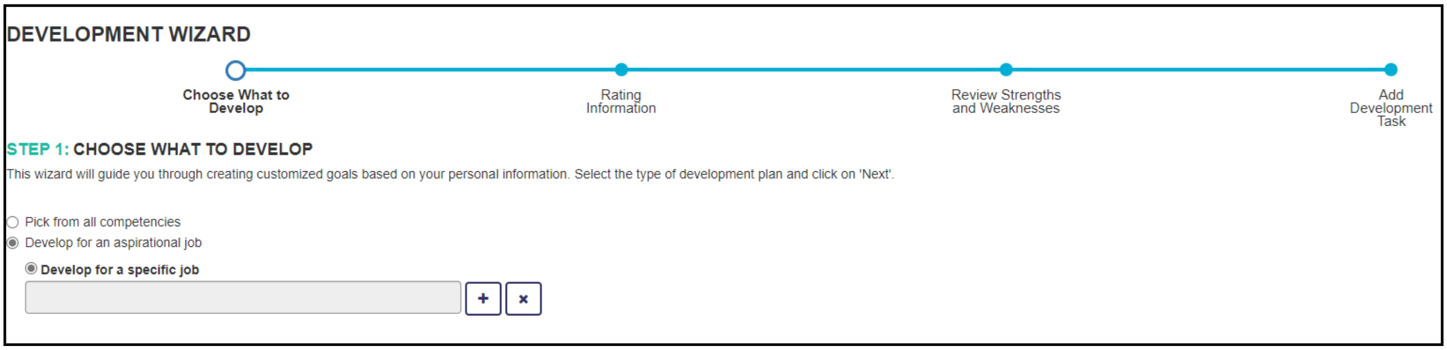
- Now, when your employee clicks on the title of the objectives you have created, all their tasks that align to that objective will populate under “Tasks.” This will make it easier for them to keep all the PIP Tasks organized, and easy to work on for the next 60 days.



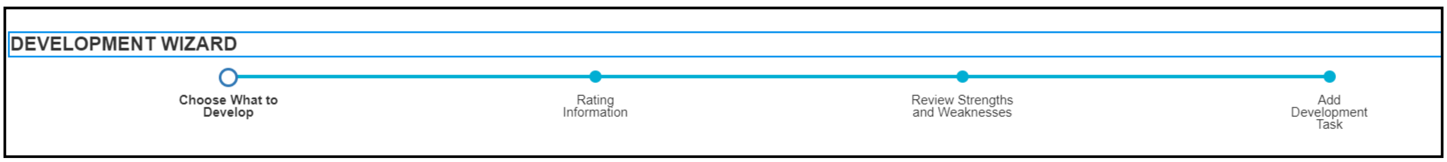
Utilize the Development Plan Smart Wizard

You can use the Development Wizard to help you determine which competencies you need to improve in and assign activities to help you improve in those areas.

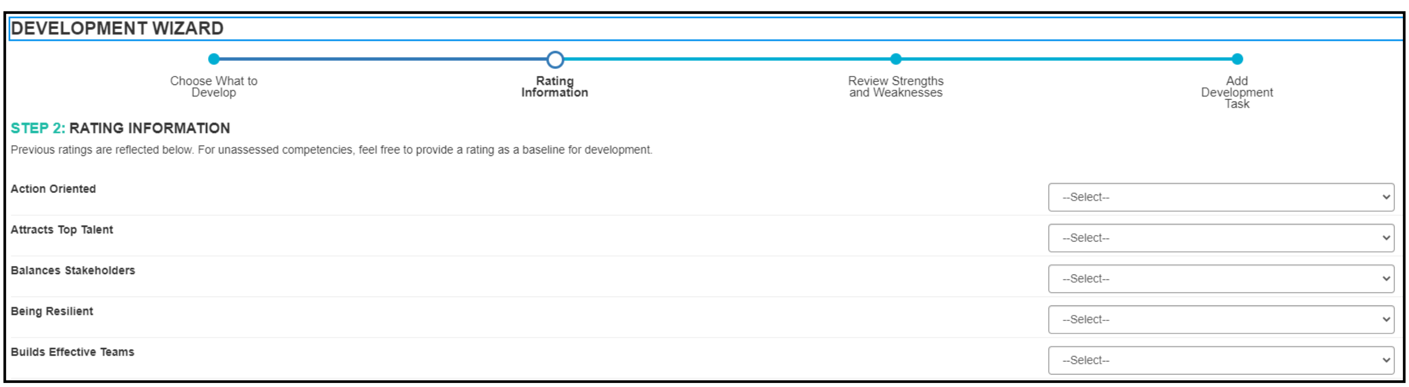
- From your "My Development Plan", select the Plan Period whose details you want to update.
- Click "Development Wizard" and choose from the following options:
    - o Pick from all competencies: Develop for competencies you select.
    - o Develop for an aspirational job: Develop for a specific job.
        - You will enter the job classification in the Search bar, once you see the classification you wish to develop towards you will click ok to get it added.



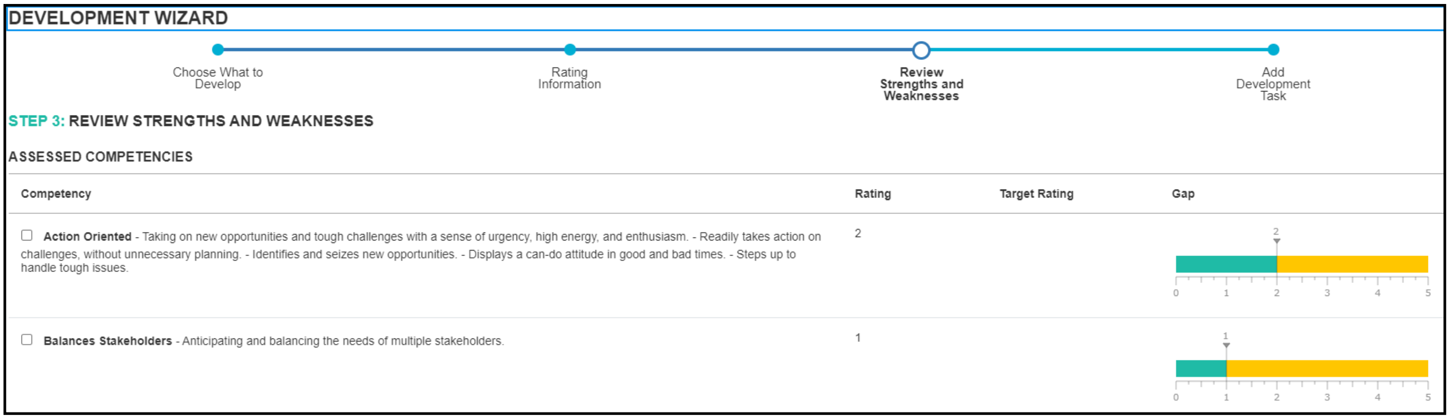
- Click "Next".



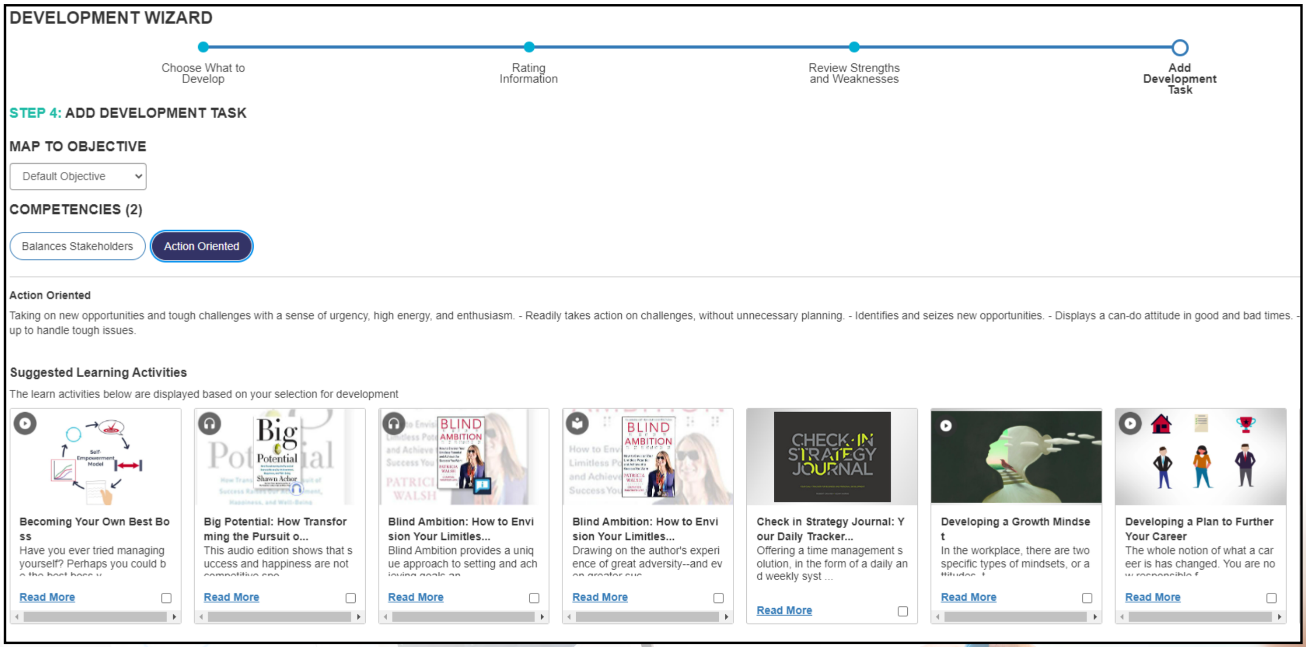
- Complete an on-demand assessment of the competencies in the selected position or job competency model. If you had selected to pick from all competencies, the assessment includes all competencies in the system. Please note: if your employee does not have a completed evaluation you will need to assess your employees current proficiency level from 0-5 with 5 being highly proficient.



- A “Reviewing Strengths and Weaknesses” screen appears. Use this screen to analyze your performance against competencies and select which to include in the development action plan.



- Select each competency to include in the development action plan. Click “Next.”
- Select tasks to assign. Below each competency is a list of development activities that are applicable to the competency, including suggested learning activities, goals, readings, and more. There is improved formatting on this page as competencies you selected in Step 3 are organized in Step 4 as clickable headings. You can now select the heading to see activities related to that specific competency, rather than having one long list of all the activities. If a competency was selected that is associated with a learning activity, a learning activity link is suggested under “Suggested Learning Activities.” Clicking on the learning activity link displays a course summary.

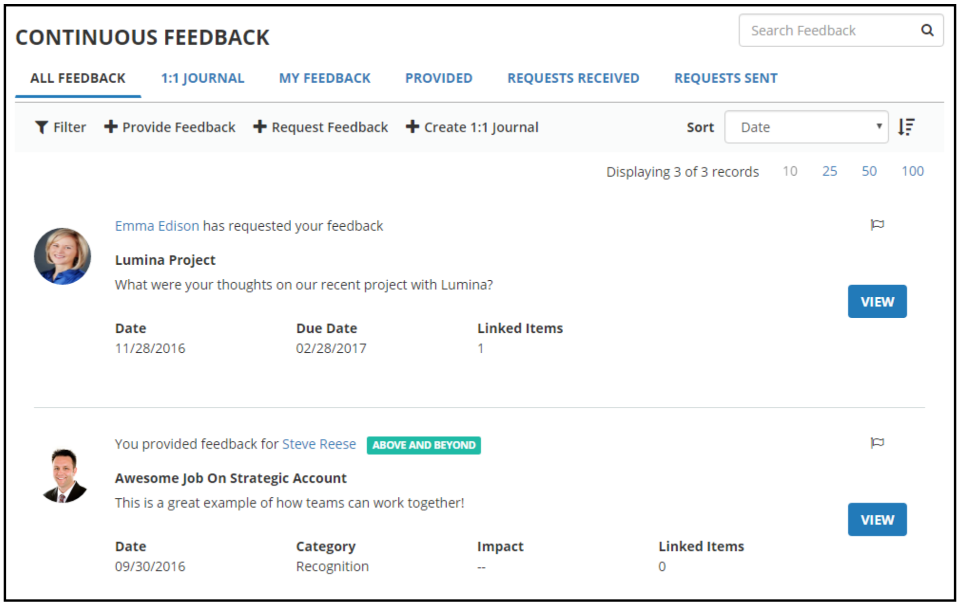


- Click “Finish.”

Continuous Feedback

Employees grow and develop best when their supervisors and peers continuously provide feedback on their work. For an organization to perform at its best, feedback cannot be confined to annual or semiannual performance reviews. The Continuous Feedback feature in the system provides a way for you to provide brief feedback on any other employee in the organization, or for managers to request feedback from their direct reports. You can provide or request such feedback at any time, independent of any process or review cycle, empowering our departments and employees to openly communicate and continuously develop.

Continuous Feedback Landing Page



Continuous Feedback Tips, Tools, and Tricks

- 1:1 Journals can only be created between managers and direct reports. 1:1 Journals cannot be created with indirect reports or other managers in the department.
- Did your employee report to another manager for a portion of the current review period? Or, did they work with another supervisor or manager on a project? Obtain their feedback using the Continuous feedback feature. Please refer to page 31 for more information on this tool. You can send a request for feedback to another manager or supervisor of your choosing and ask that they provide their feedback and comments about how your employee performed. You can use their comments in their evaluation. Please note, the feedback will be visible on requested employee's "Timeline".
- Giving and receiving feedback can be a complicated endeavor. Manager's roles are critical in fostering a productive, efficient, and engaged work environment. Providing effective feedback that will have an impact developing employees must therefore be constructive, use appropriate language, and use points of observable behavior. Below are points to assist in providing continuous feedback:
    - Make feedback a continuous part of the work environment.
    - Feedback can be very effective when given in small doses on a continuous basis, such as on a weekly basis after a call, meeting, or presentation. Too often, giving feedback becomes a big and stressful event, taking the form of a scheduled review mid-year or at the end of the year. Yes, formal reviews are important, but employees need more frequent one-on-one time to know you care. Managers can create a culture where feedback is used as a positive mechanism to make people aware of what's working and what's not, and to gently adjust behaviors as needed. It makes no sense to wait six months to let someone know they did something well or that they need to focus on a specific area. We need to shift the perception that feedback is a negative event to one that is a normal and frequent part of growth.
    - Be specific and highlight excellence.

- Too many managers are vague in their feedback or use feedback to only highlight weaknesses. Employees will be much more receptive to feedback if you can be specific and help them understand how they deliver excellence. This approach will help them identify which behaviors to repeat and how they add value.
- Please note, if you request feedback for an employee, the employee will be able to view the feedback when it is provided on their Timeline.

Five Best Practice Steps for Giving Feedback

Feedback is an essential ingredient for continual improvement. Feedback is defined as “information that is shared with a person or group for the distinct purpose of improving results or relationships. Effective feedback is not venting, shaming, blaming, or yielding to excuses.”

We live in a feedback rich world. We see feedback done well and poorly in a variety of different places, such as on professional sports teams, reality TV, and of course, in a professional setting. Continual feedback, when performed correctly, can work for you and your team as well! Studies on feedback in the workplace show that high-performing teams communicate and provide feedback in a positive manner over 80% of the time.

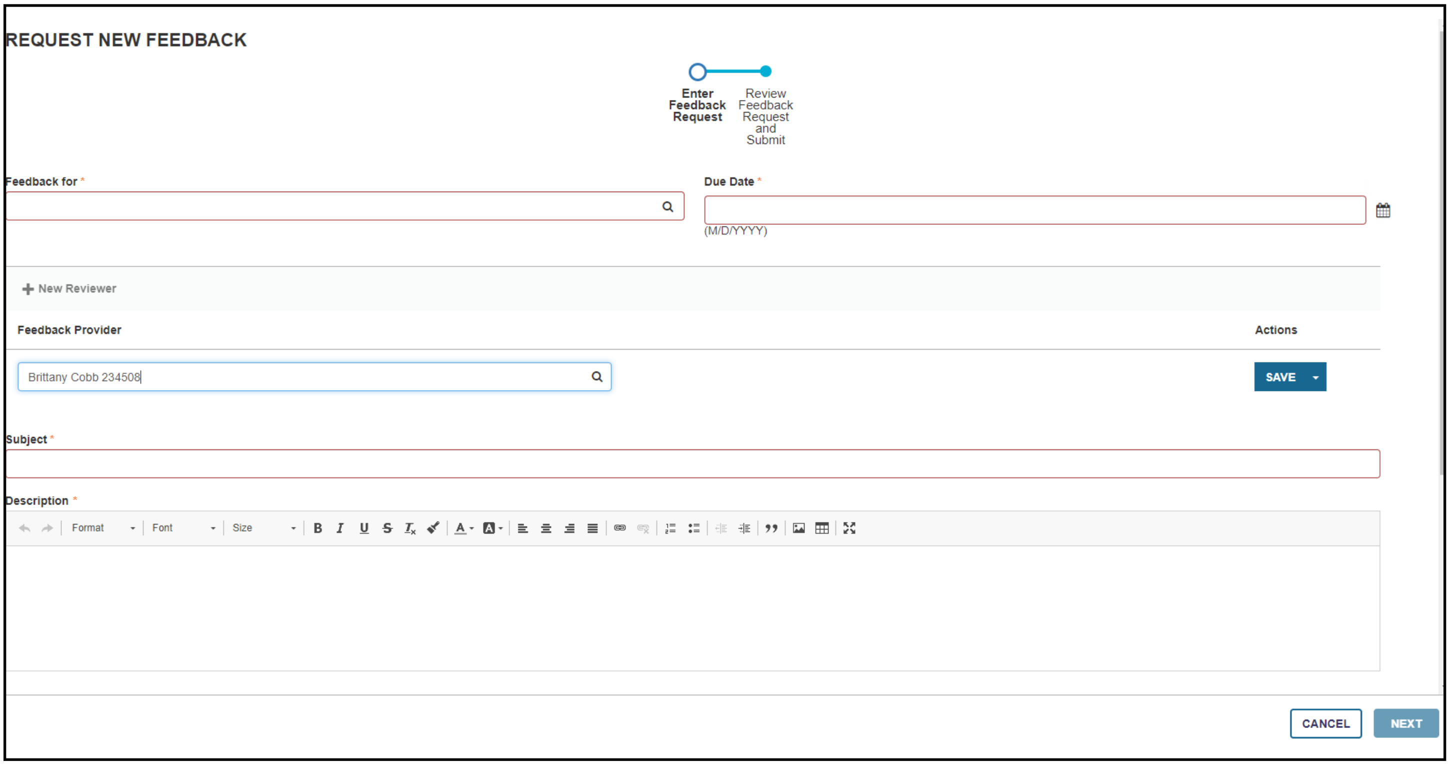
Utilize the Five Best Practice Steps for Giving Feedback below – from HR Learning & Organizational Development’s iLoveFeedback course! For more information and to enroll in the full-length version of the course, find the link located in the Appendix at the end of this guidebook.

- **Step 1: Find Your Zone**
  - Get yourself in to the right zone for providing feedback before you give it.
  - How is your energy? When you begin a feedback session energized, you will maintain better self- control.
  - How is your attitude? We often give feedback when we are still feeling angry, hurt, or disappointed. When we provide feedback under these conditions, we are not only hurting the relationship, we are also hurting ourselves.
  - Are you in the right environment to provide feedback? If your goal in offering feedback is consistent with helping your team member improve, you must select an environment that creates the right energy and attitude to have the conversation.
- **Step 2: Get Smart**
  - Be purposeful in your feedback. Take the time to connect the feedback you will be giving to how your information will help or hinder the other person’s success or improvement. What are your reasons for providing the feedback? What is your intent? What is in it for the receiver?
- **Step 3: Create the Message**
  - Words carry our meaning. Be intentional in what you say. Ensure you are crafting your message with words and phrases that are specific and observable. Your feedback will be best communicated when all persons seeing or hearing the conversation could also come to the same conclusion.
- **Step 4: Deliver the Feedback**
  - Deliver the feedback using three steps:
  - Ask for permission: Asking your team member if they are open to receiving feedback demonstrates respect and puts them in a more receptive mode.
  - Be appreciative: Be appreciative of the positive contribution that this person makes to the team and to the department. Showing appreciation helps set the stage for open acceptance to receiving feedback.
  - Share the feedback: Share the feedback in a way that allows your team member to hear and accept it. Pay attention to your body language and other non-verbal’s during the feedback conversation.
- **Step 5: Encourage, Energize, and End Well**
  - Share the feedback in a way that allows your team member to choose to change. Offer your support, encourage dialogue, and listen attentively during the conversation. End by determining the next steps for follow-up, if necessary, and ensure you thank them for being opened to receiving the feedback.

Requesting Feedback

If you are a manager, you can request that any employee provide feedback on yourself or another team member. The request for feedback then appears as a task in the requested employee's Timeline. Feedback you request will be visible to yourself, the feedback provider, and after the feedback is supplied, the target employee, and the employee's direct manager.

If you are an employee, you can request that any employee or manager provide feedback for your performance. You cannot request feedback for any other employees. Feedback you request will be visible on your timeline.



To request feedback, follow the steps outlined below:

- Navigate to Self -> Collaboration -> Continuous Feedback
- From the Continuous Feedback landing page, click "Request Feedback."
- Use the "Feedback For" field to select the employee who will receive feedback. If you are an employee, your name will be the only name available in this field.
- Enter all or part of the employee's first name, last name, or Employee ID. The system displays any matching results as you type.
- Select the desired employee from the list of results.
- To add who you would like to receive the feedback from, please add the name in the "new reviewer" field". To do so, click "+ New Reviewer." Enter all or part of the employee's first name, last name, or Employee ID. The system displays any matching results as you type.
- Select the desired employee from the list of results and be sure to click Save to be able to move on to the next step.
- To update a reviewer, click "Edit" and perform the above steps.
- To remove a reviewer, select "Remove" from the Actions menu.
- Enter the "Due Date" by which users should provide feedback.
- Enter the "Subject" line of the feedback request.
- Enter a "Description" of the feedback request. This description appears with the request in the requested employees' Timeline.

- To add a new item, click “New Linked Item.”
- Select the “Type” of item (Competency or Goal).
- You can select any competency associated with the user, their primary job, or their primary position.
- Select the specific Competency or Goal from the menu.
- Click “Save.”
- To edit an existing item, click “Edit” and perform the steps above.
- To remove an item, select “Remove” from its Actions menu.
- Use the “Additional Questions” section to add more questions from a question template, or ad-hoc questions from the Continuous Feedback Question Library.

Providing Feedback

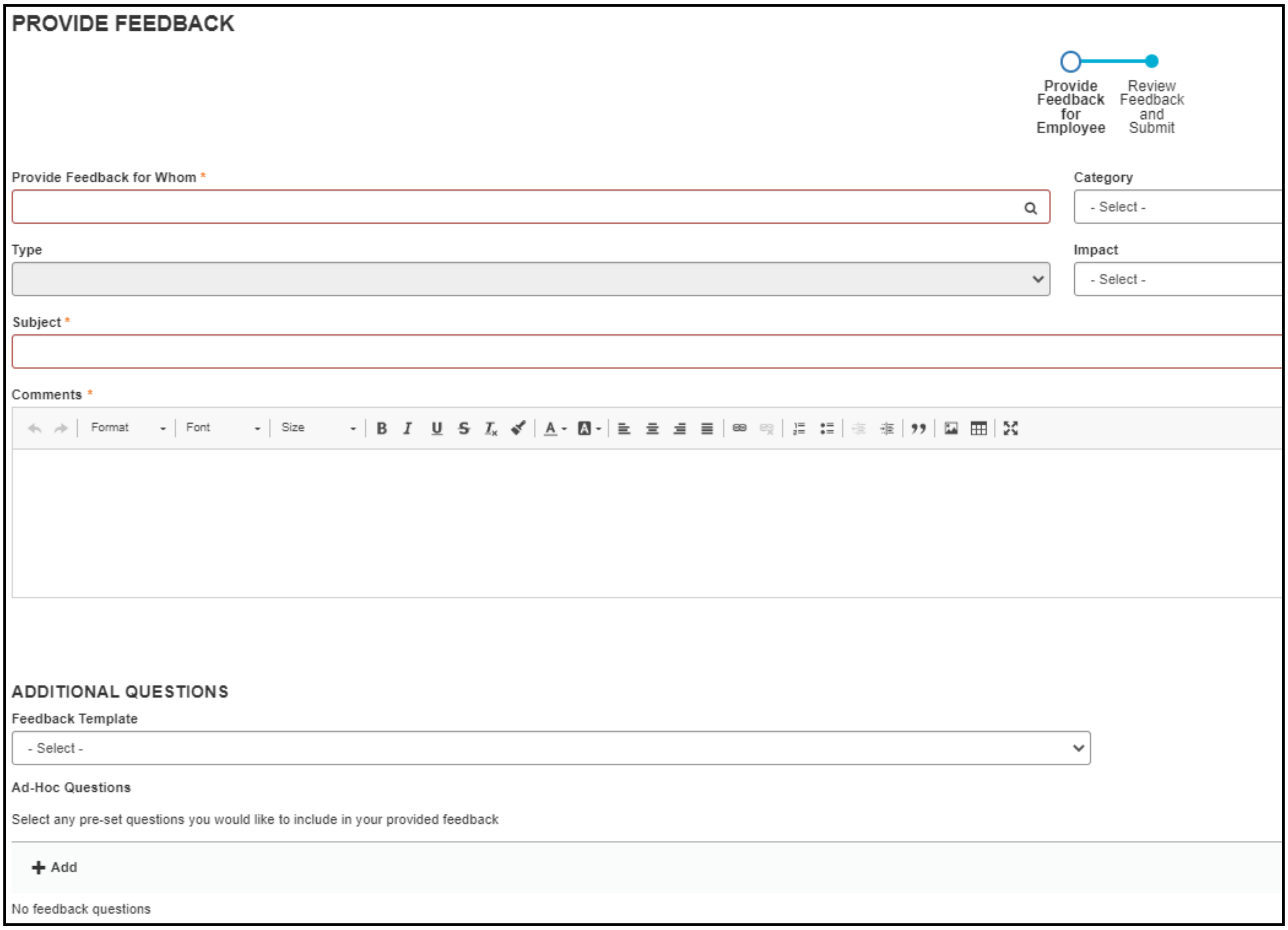
Whether you are a manager or individual contributor, you can provide feedback on any user in the system at any time, regardless of your relationship to the user or group access rights. Feedback you provide appears on the user’s Continuous Feedback landing page, along with any other feedback the user has received.

Feedback you provide will be visible to yourself and the target employee.

<u>To provide feedback, follow the steps outlined below:</u>

- From the Continuous Feedback landing page, click “Provide Feedback.”
- Use the “Provide Feedback for Whom” field to select the employee who will receive feedback.
- Enter all or part of the employee’s first name, last name, or Employee ID. The system displays matching results as you type.
- Select the desired employee from the list of results.
- Select the feedback category.
- If you select a Category, also select the “Feedback Type” to further categorize it.
    - For example, if you had selected “Coaching” as the category, you may select “Keep Doing” as the type to encourage the employee to continue doing what they are doing.
- Select the Impact level of the feedback.
- Enter the Subject line of the feedback.
- Enter additional Comments. You can consider this the body of your feedback.
- Use the Linked Items section to link competencies or goals to the feedback:
    - Select the Type of item (Competency or Goal).
    - You can select any competency associated with the user, their primary job, or their primary position.
    - Only users with a particular relationship to the target user can leave unsolicited feedback on competencies or goals, as configured by an administrator.
    - Select the specific Competency or Goal from the menu.
    - Click Save.
- To edit an existing item, click “Edit” and perform the steps above.
- To remove an item, select “Remove” from its Actions menu.
- To add a new ad-hoc question, click “Add” and select the box next to the one or more questions you would like to add.

- To remove an ad-hoc question, click “Remove”.
- You can reorder ad-hoc questions with the order icon.
- Click “Next.”
- If you are satisfied with your feedback, click “Submit.”



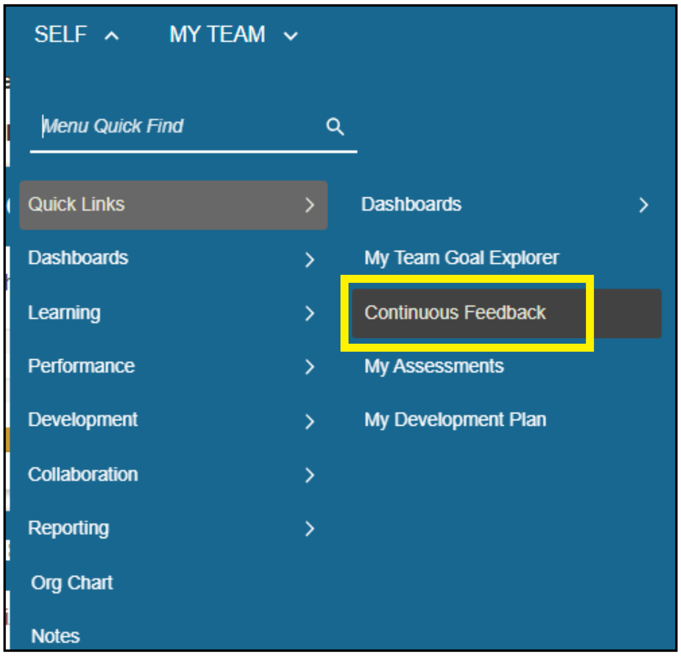
Creating a 1:1 Journal

A good manager-employee relationship relies on good communication. You may stay in frequent contact outside the system, using a variety of methods: email, in-person meetings, or phone calls. You may also have regular 1-on-1 sessions to get a comprehensive status report or provide mentorship.

The Continuous Feedback 1:1 Journal can help you record and track these discussions. The 1:1 Journal allows you to open threads between yourself and your manager or a direct report, then continue to track and respond to that thread until it is complete, at which point you can close it out.

When a manager or direct report takes action on a 1:1 Journal (that is, opens an entry, replies to an entry, or closes one out), you will receive an email notification, and a task appears under the Feedback tab in your Timeline. Open the provided link to view journal details, reply to a thread, or thank them for their feedback.

- From the “Self” tab, select Continuous Feedback.



- Navigate to the “1:1 Journal” tab and select “Create 1:1 Journal”

- Utilize the magnifying glass to select who you would like to create a 1:1 Journal with.
- Type: Select the journal type (1:1 Meeting or Status Update)
- Reminder: If you would like automated reminders sent pertaining to this journal, select the frequency (Daily, Weekly, or Monthly)
- Meeting Link: If you will be meeting with your employee remotely, utilize this field to enter in your virtual meeting link.
- Subject: Enter in the subject of your 1:1 Journal entry
- Description: Enter in the content of your 1:1 Journal entry in this field.
- Click “Next”
- An overview of your Journal entry will pop up for you to review.
    - You have the option to click “Back” and make corrections or click submit and it will be sent to your recipient.
- When you receive a response to your 1:1 Journal, you will get a notification in your e-mail. Go to your Timeline and click the Feedback Tab to see the response.

Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process)

Completing your staff's regular annual performance evaluation is a simple, two-step process. The components of the annual performance review are as follows:

- **Competencies:** Competencies, based on job role, will auto-populate to the evaluation. Provide a year-end overall rating for each competency.
- **Goals (Optional):** Goals assigned to the current review period will auto-populate to the evaluation. Review, and add any as applicable.
- **Development Plan (Optional):** Utilize this section of the evaluation to identify any activities to complete that will assist in the development for the employee's current or future role.
- **Year-end summary/Overall Rating:** Provide any overall comments for the employee's evaluation, as well as your year-end evaluation of the employee.
- Signature and date

Should you rate your staff as "Unsuccessful/Needs Development," the Performance Improvement Plan, or PIP, the process will begin in the system and is a four to six-step process between you and your employee, please review "How to complete a PIP Review" on pg. 47.

Sample Regular Performance Evaluation

2024 ANNUAL PERFORMANCE EVALUATION FOR TEST USER2

Manager: Test Manager

▾ OVERVIEW

Utilize this form to complete the 2024 performance evaluation. The manager/supervisor has 60 days from the time the evaluation task is assigned to obtain additional feedback from other managers/supervisors and complete the evaluation. The tools below can be utilized to:

- Save your progress
- Submit once complete
- Print a summary of the evaluation
- Access your Notes to copy and paste applicable information into the comment sections below
- Easily navigate to the various components of the evaluation
- Conduct a spell/legal check of any verbiage utilized on the evaluation

Reach out to PerformanceMgmt@Rivco.org should you have questions or experience any difficulty in completing the form.

Please note: If the overall rating is "Unsuccessful/Needs Development", the manager/supervisor must consult with their internal department HR (if applicable) and County Employee Relations (HRInvestigationsUnit@RivCo.org) prior to submitting the completed evaluation.

Save | Submit | Print Preview Form | Notes | Go To | Spell/Legal Check

▾ COMPETENCIES

Employee: Thoroughly review the your Performance Evaluation to ensure your understanding of the ratings and the information provided. It is your responsibility to ask for clarification if any of the information is not clear.

Manager: For more information on each competency, including definition and behavioral descriptions, please click on the arrow to expand each competency listed below. When adding supporting information to the comment box for each competency, click on the Commenting Assistant to view additional behavioral descriptions for each rating and access your applicable Notes.

If the competency rating is "Successful" or "Exceptional", detailed notes are optional, but you should provide information to support the rating given, including specific examples of observable behaviors and job duties performed supporting the competency rating, and directions for improvement if the rating is borderline "Successful".

Where the employee is rated as "Unsuccessful/Needs Development", comments are **required** to support the rating. In every competency rated "Unsuccessful/Needs Development", include two to three examples including the dates when the errors occurred or when they were discovered (must be within the rating period). Dates should be double-checked for accuracy. The comments must include a description of the impact to the unit, department, and/or customer. Examples, errors, or areas of a deficiency referenced in the evaluation should not be a surprise to the employee. You should be able to reference dates in the evaluation when you discussed or placed the employee on notice of your concerns and/or coached them about your expectations.

Competencies

▸ Expand All

▾ Manages Complexity — Year-end Rating * [- Select -]

Making sense of complex, high quantity, and sometimes contradictory information to effectively solve problems.

- Asks the right questions to accurately analyze situations.
- Acquires data from multiple and diverse sources when solving problems.
- Uncovers root causes to difficult problems.
- Evaluates pros and cons, risks and benefits of different solution options.

Year-End Comments

Tahoma

▸ Resourcefulness — Year-end Rating * [- Select -]

▸ Communicates Effectively — Year-end Rating * [- Select -]

▸ Ensures Accountability — Year-end Rating * [- Select -]

▸ Self-Development — Year-end Rating * [- Select -]

▾ GOALS

▾ DEVELOPMENT PLAN

▾ YEAR-END SUMMARY

★ Rating Legend

Overall Comments

Manager's Year-End Comments *

Tahoma

Overall Ratings

Manager Year-end Overall Rating * [- Select -]

▾ SIGNATURES

Manager Year-End

Manager Year-End *

SIGN | CLEAR

Sign Date *

I acknowledge that it is my responsibility to review the evaluation with the employee within a reasonable time after submitting to the employee for review and signature. I also acknowledge that if the overall rating is an "Unsuccessful/Needs Development" that I have received the appropriate consultation with my department HR representative and with County Employee Relations prior to submitting for employee review. *

☐

▾ ATTACHMENT(S)

Please upload any supporting documents.

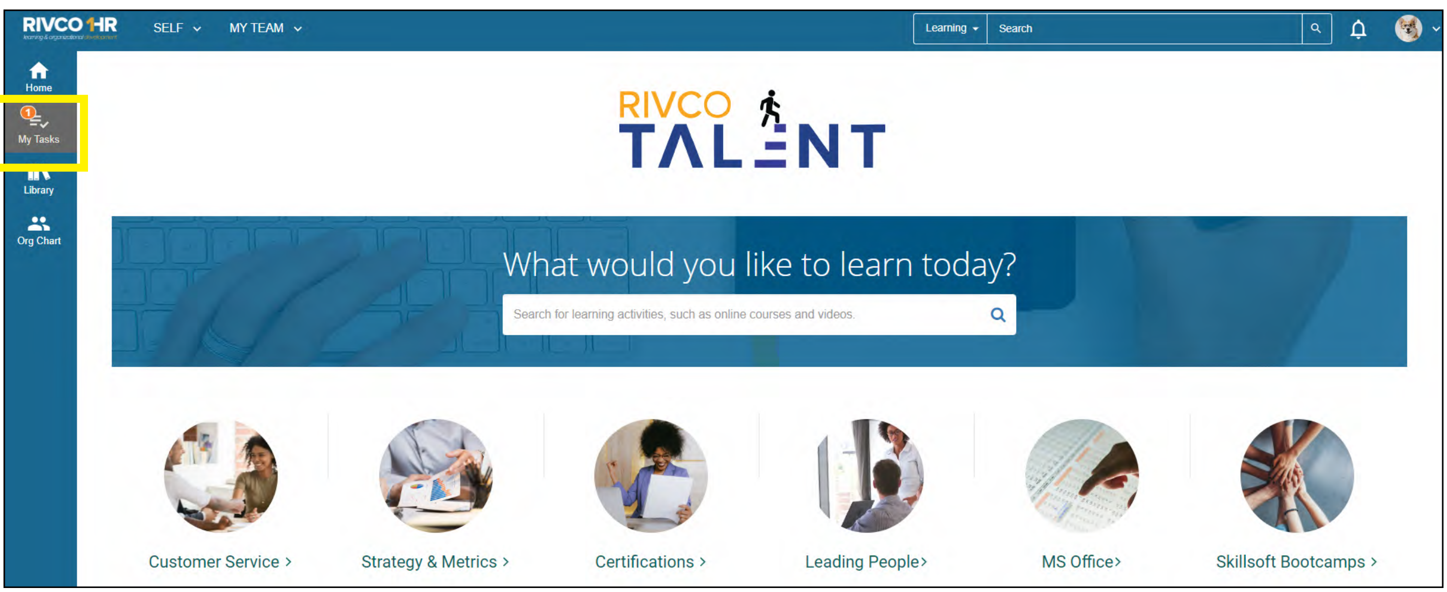
Filename	Actions
Choose File No file chosen	ADD

Performance Evaluation Tools, Tips, and Tricks

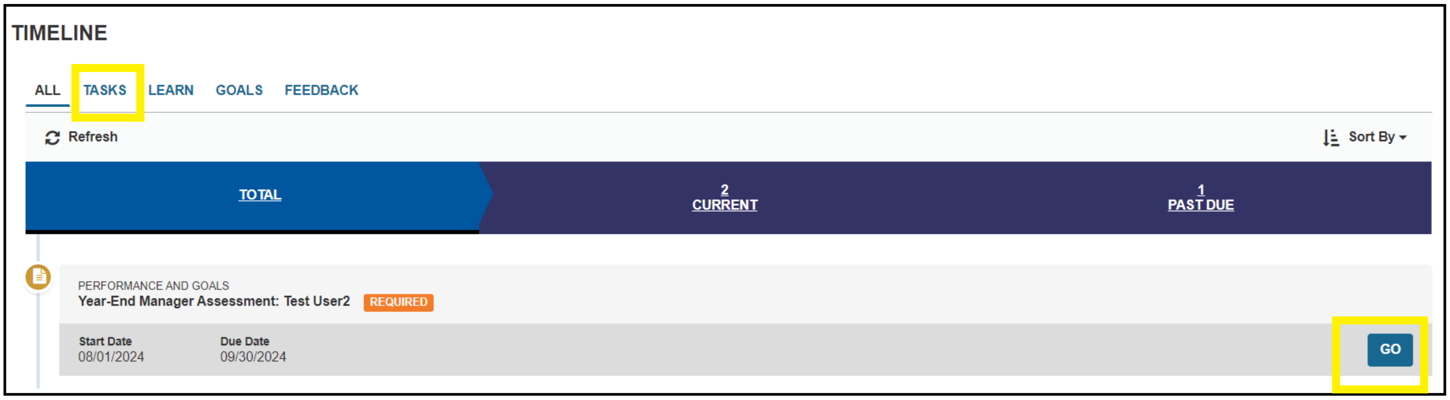
- A performance evaluation will populate as a Task in your Timeline 60 days prior to when it is due.
- Utilize the "Spell/Legal Check" to check for spelling errors, typos, as well as to perform a check of any language that should be omitted from an evaluation for legal purposes.
- Overall ratings in the system have changed along with the new system. See below for the new rating scale:
    - **Exceptional**: Employee exceeded all performance expectations. Employee was an exceptional contributor to the success of the department and the County of Riverside. Steps outside of existing responsibilities to add value to the work group and/or department. Employee demonstrated role model behaviors.
    - **Successful**: Employee met all performance expectations and may have exceeded some. Employee was a solid contributor to the success of the work group, department, and the County of Riverside. Performance consistently met the demands placed upon the position. Required minimal supervision and complied with work rules and regulatory requirements.
    - **Unsuccessful/Needs Development**: Employee did not meet all or most of the established performance expectations. Employee needs significant improvement in critical areas of expected job results or behavioral competencies.
- An overall rating of "Unsuccessful/Needs Development" will initiate the Performance Improvement Plan/ PIP process in the system.
    - Ensure you reach out to your Employee Relations (ER) Representative before submitting a rating of Unsuccessful/Needs Development in the system.

Completing an Evaluation in RivCo Talent

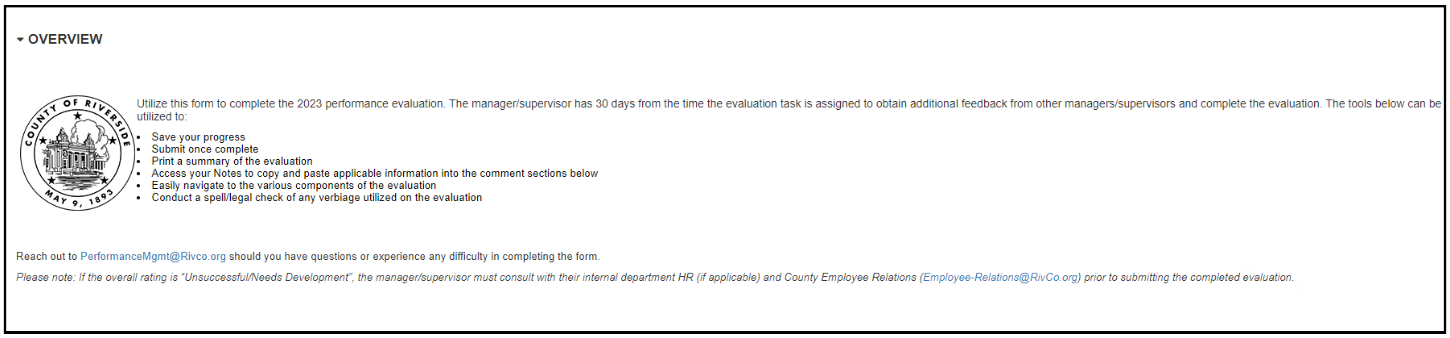
- To start an evaluation in RivCo Talent Performance, sign into the system here: https://corlearning.sumtotal.host/
- Once logged in, you will see your profile page. Please note, if your Department is DPSS or Public Health your home screen will look different.
- On the left corner, click on the "My Tasks" icon to access any evaluations ready to be completed. All evaluations are generated 60 days before the employee's yearly anniversary date in their current position.



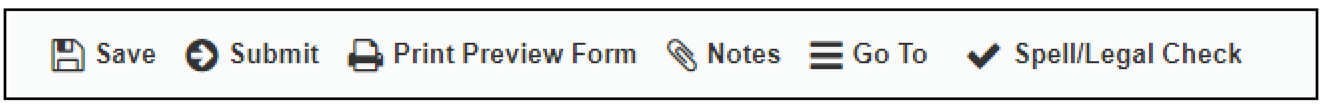
- Once clicked, you will be taken to your Timeline. To quickly access all Tasks, click on the "Tasks" link on the top of the page.
- Here, you will see all Tasks that need to be completed. Click "Go" next to the evaluation you will be working on.



- The evaluation will launch, but before you get started, please be sure to read the overview.

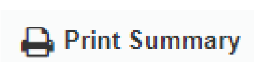


- Under the Overview is the Toolbar that has many useful tools to help you complete your evaluation:



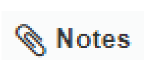
- Let's quickly review these tools:

Use the save icon to save your progress.



Once you have completed all the evaluation steps, use the submit button to submit your evaluation.

Is where you can see a preview of the evaluation and are able to Print, export to PDF, or return back to the evaluation.



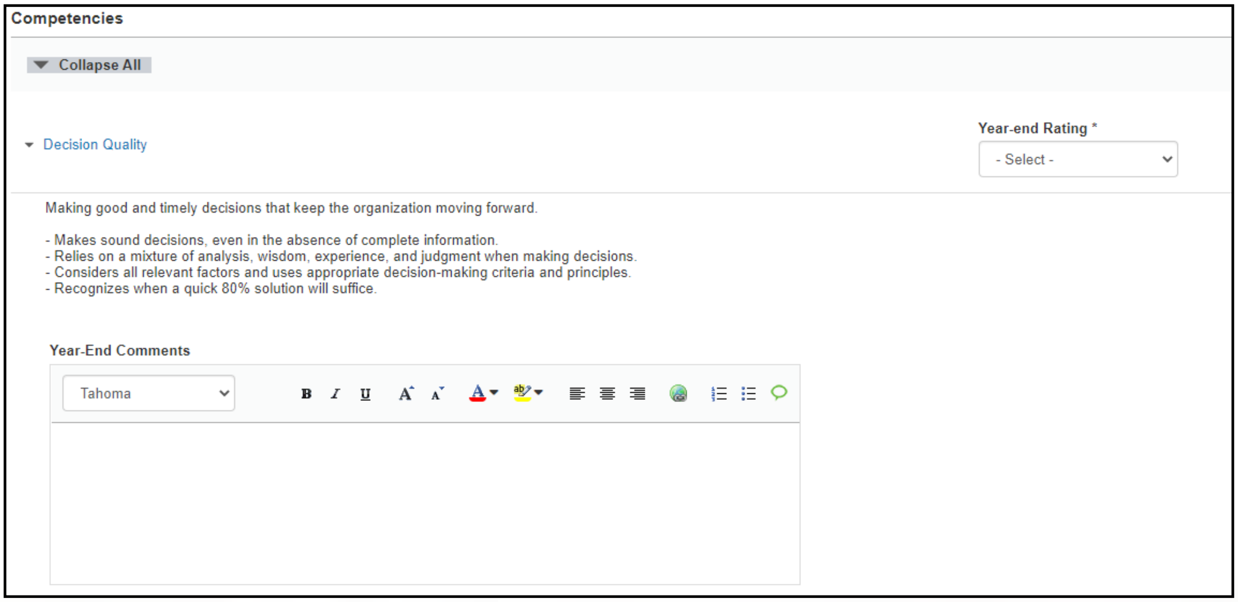
Can be utilized to copy and paste past notes you have with the employee from One-on-One Meetings or any notations you have made about them throughout the year. For more information about the Notes section, please refer to our Notes Functionality section in this guidebook.

Can easily navigate to any of the various components of the evaluation, such as Competencies, Year-end summary, or Attachments.

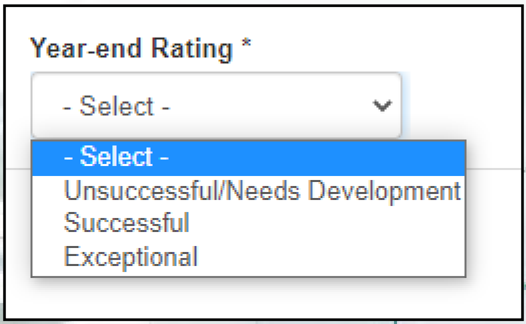
Is a handy tool that will spell check the whole document, as well as make sure you are using legally appropriate words in your evaluation.

Evaluation Components: Competencies (Required)

- Below the Toolbar is where you can begin to rate your employee's competencies. Competencies are now pre-populated for all employees with the County's newly adopted Competency Model that bases an employee's rated competencies on their job level. For additional information on the County of Riverside's new competency model, refer to the Performance Management website which can be accessed by clicking **HERE**.
- Expand each of the pre-populated competencies by clicking the arrow next to the competency name to see more information, including definition and behavioral descriptions for each.

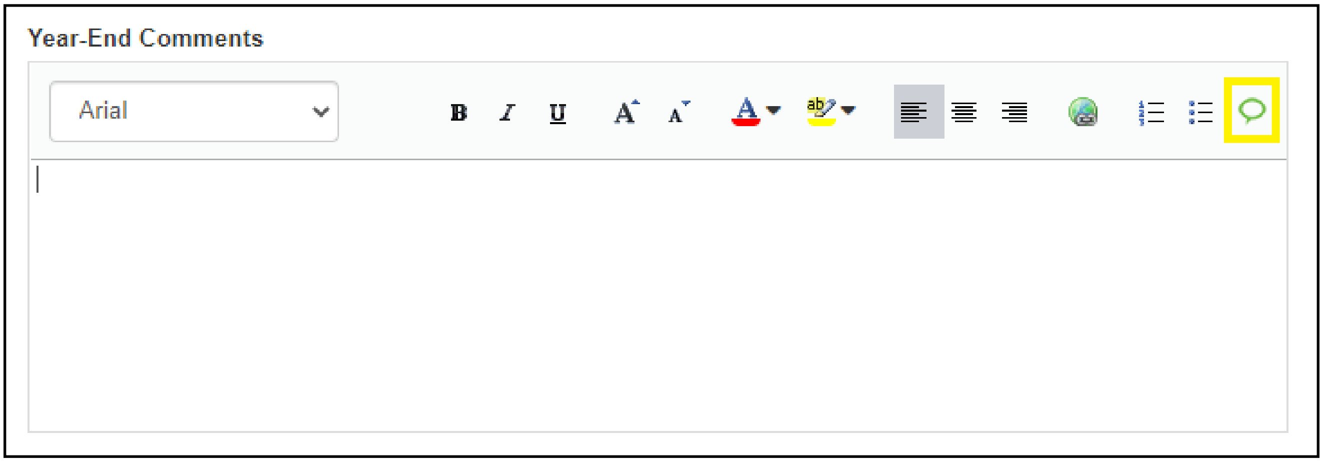


- Once expanded, you will see "Year-End Rating." Click the down arrow to select the appropriate rating.

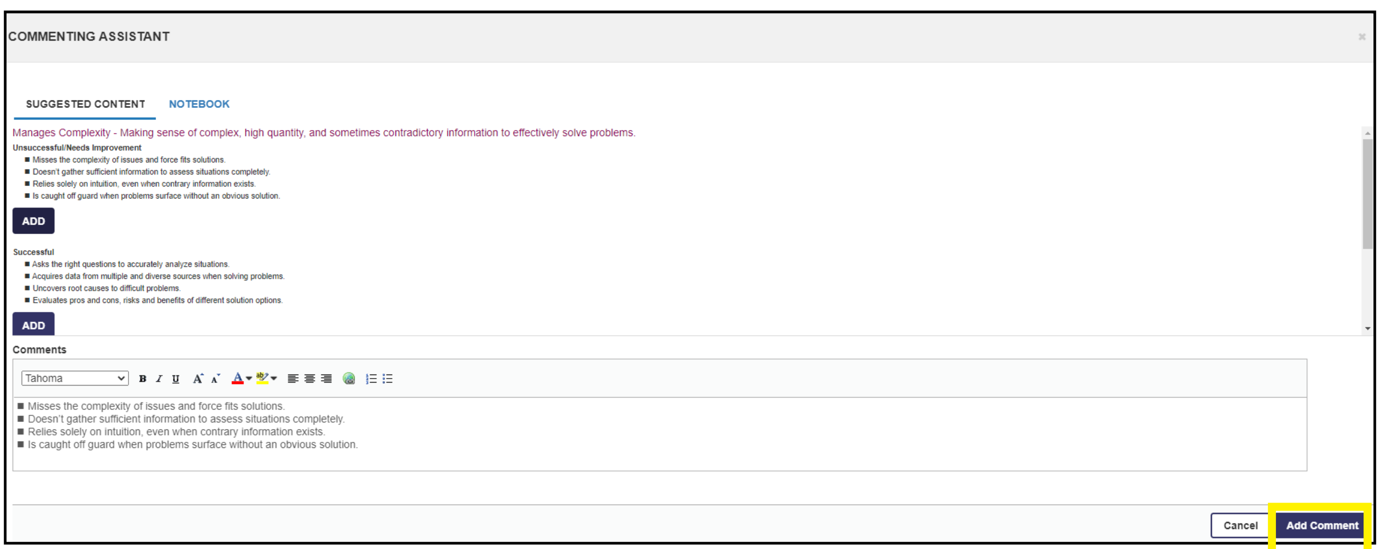


- Year-End Comments box: Utilize this box to add in any comments that justify the rating you have given your employee. It is not required but highly suggested that comments be entered for all competencies. If rated "Unsuccessful/Need Development" a comment is required to submit the evaluation.

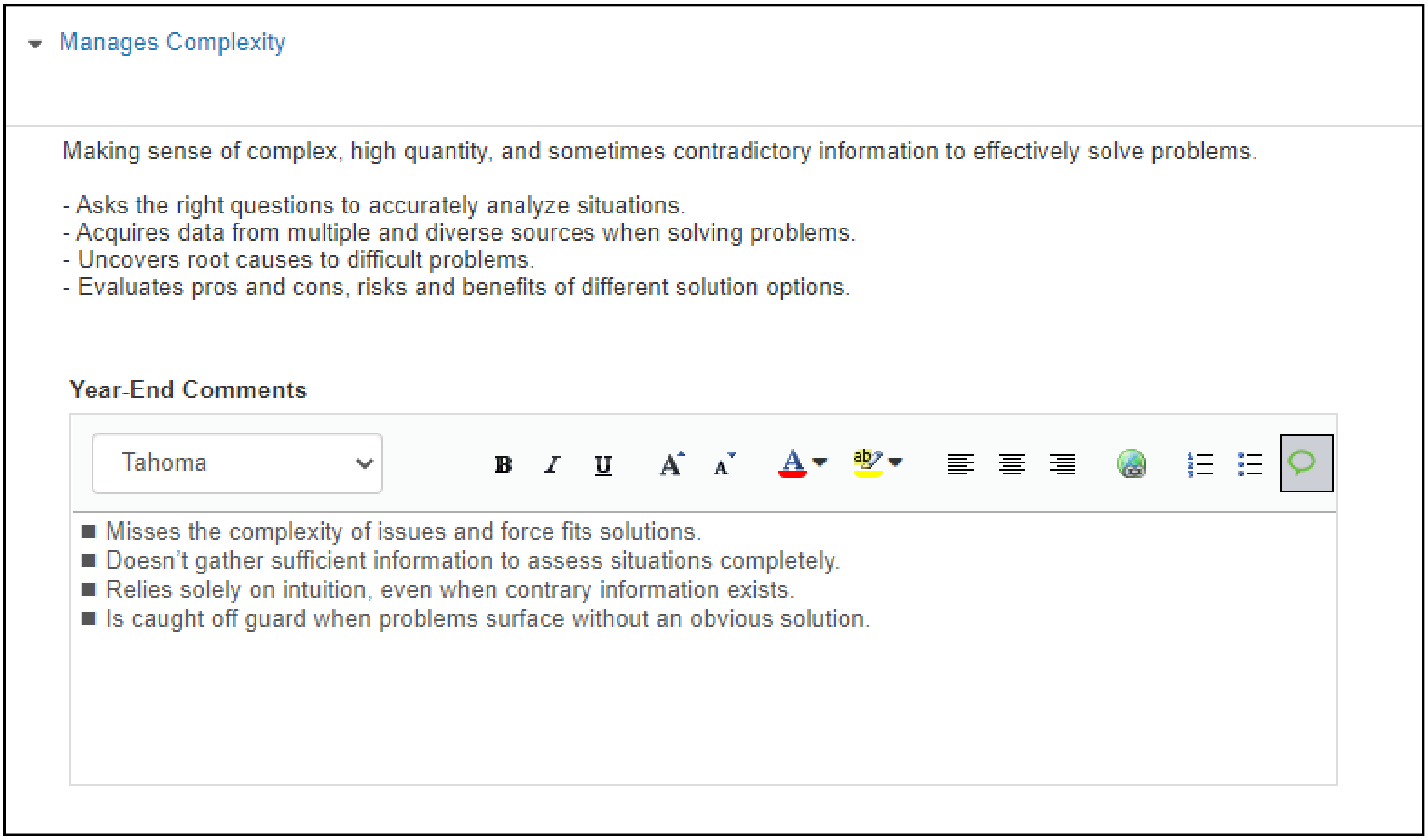
  In this section you can refer to your notes tool. Utilize it by copying and pasting notes you have for the employee from the past year's 1:1 meetings and any kudos you have received for the employee. These can all be added in the corresponding competencies comment sections.



- Note: The green chat box icon can be used to help in adding the appropriate comments for each rating by using the "Commenting Assistant."

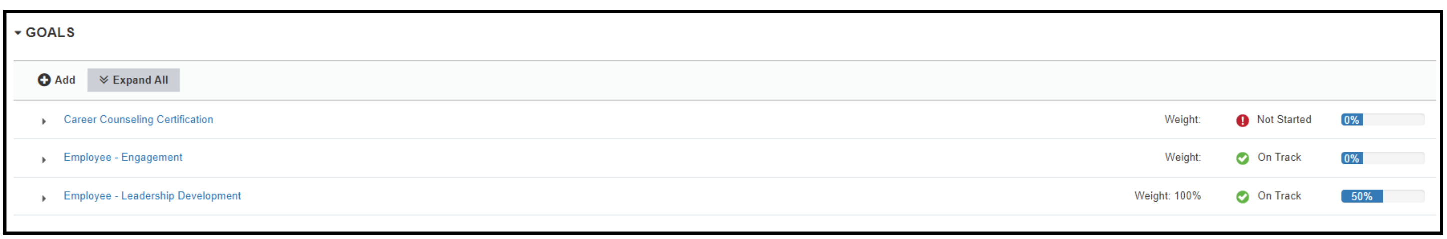


- Click "Add Comment" for any comments that you would like to use, and it will appear in the comment box.



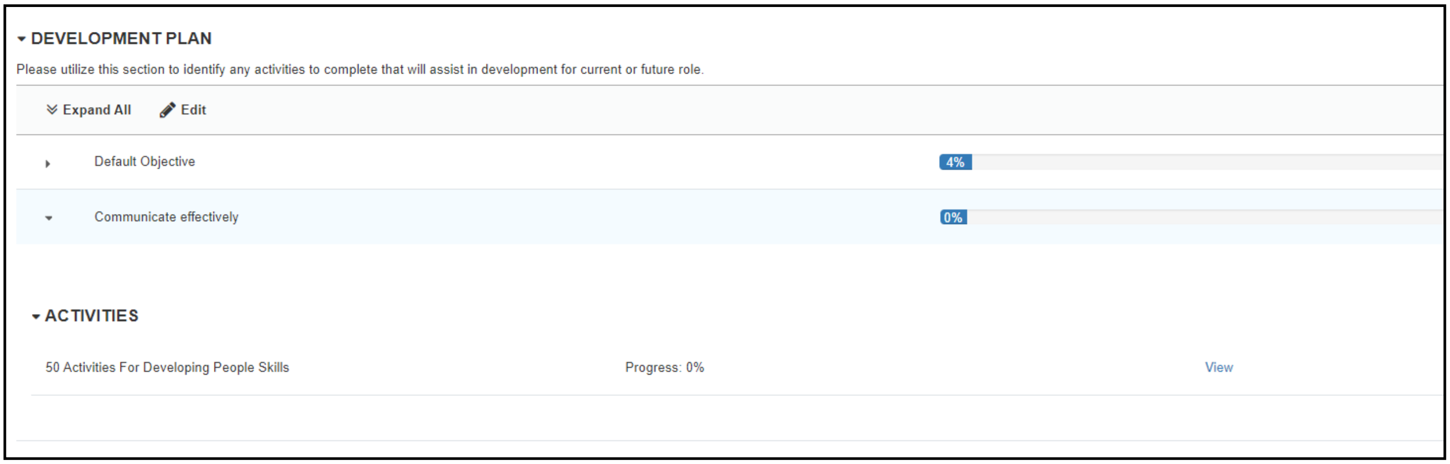
- Note: We recommend that a comment be written for each competency. A comment is required for all "Unsuccessful/Needs Development" ratings.

Evaluation Components: Goal Section (Optional)

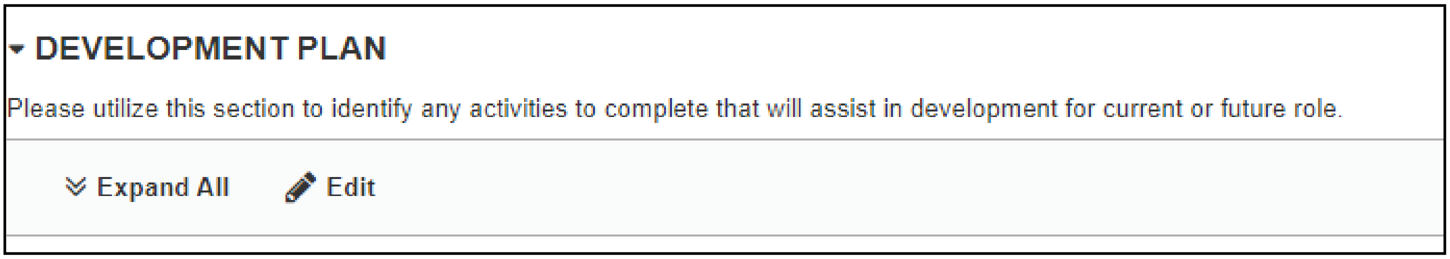


- If your department utilizes the Goal Section, this section will have already been completed earlier in the year. For more information on goals, please refer to the goals section of this guidebook.
- You can expand each goal in this section. You also have the ability to edit the goals as needed.

Evaluation Components: Development Plan Section (Optional)

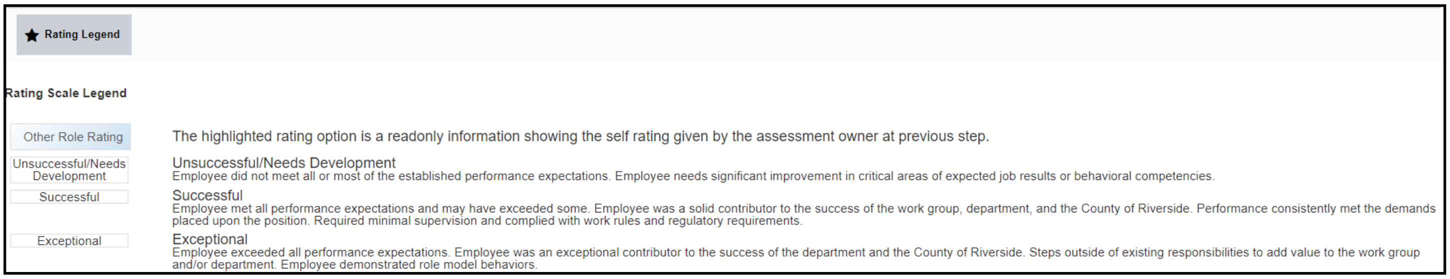


- A Developmental Plan will have already been completed at the beginning of the evaluation cycle. For more information on this area, please refer to the “Create a Development Plan” tutorial in RivCo Talent, or the Development Plan section of this guidebook on page 23.
- You can expand the different Development Plans that have been created, edit any that you created, or add a new one if needed.



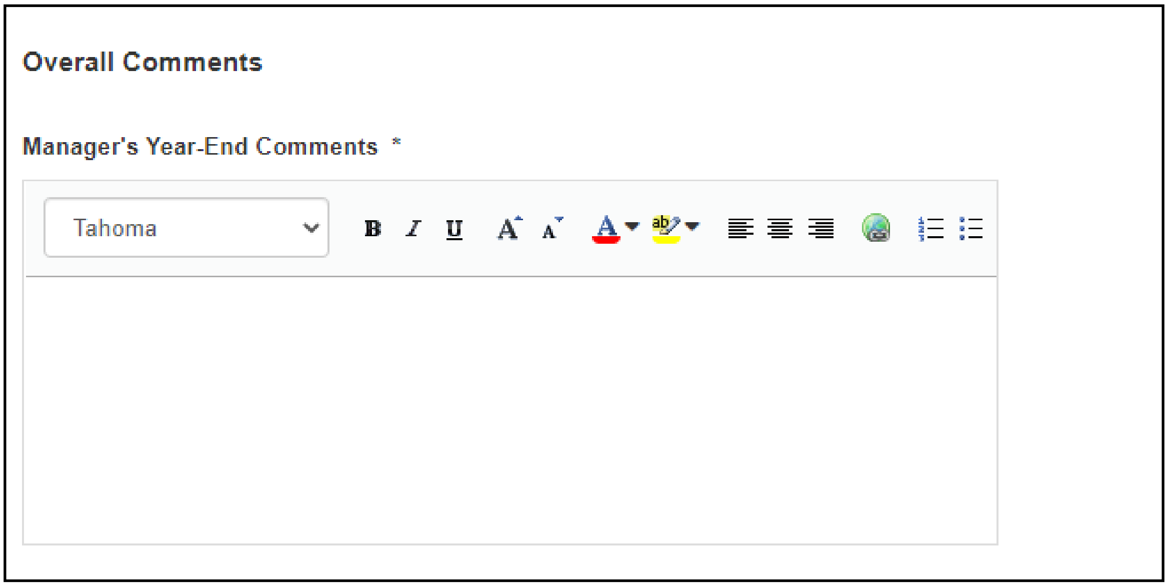
Evaluation Components: Year-End Summary

- When clicked, the “Rating Legend” will show all rating choices, as well as their descriptors, to aid in picking the final rating.
    - *Note*: If rating any employee overall as “Unsuccessful/Needs Improvement,” please refer to the “Start the Performance Improvement Plan Process” and the “Overview of the Performance Improvement Plan Process” tutorials (coming soon).

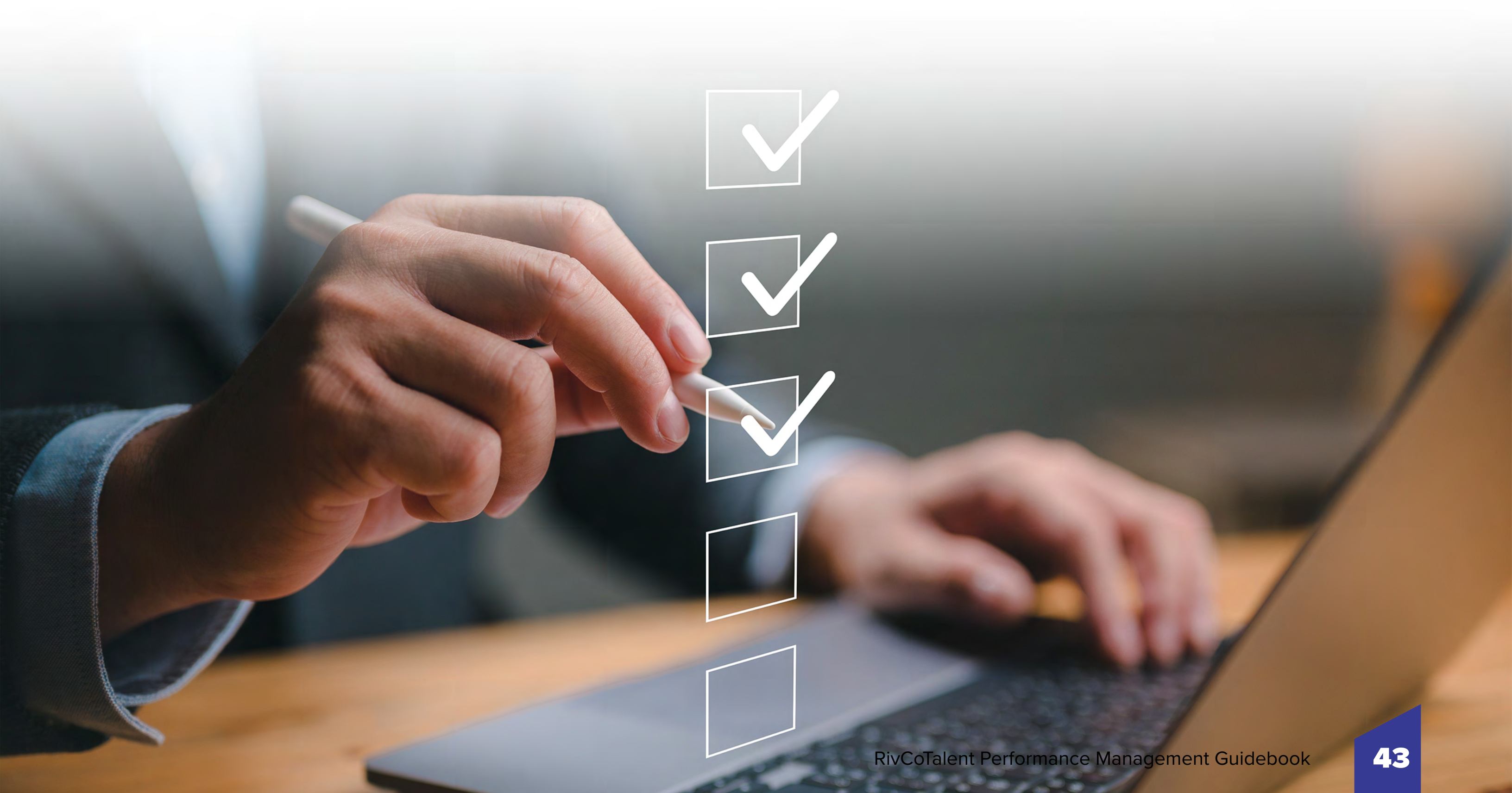


Evaluation Components: Overall Comments (Required)

The comment box in the "Overall Comments" section is used to summarize the evaluation and give final thoughts on how the employee performed for the year in their current role based on the Manager Year-End Rating.

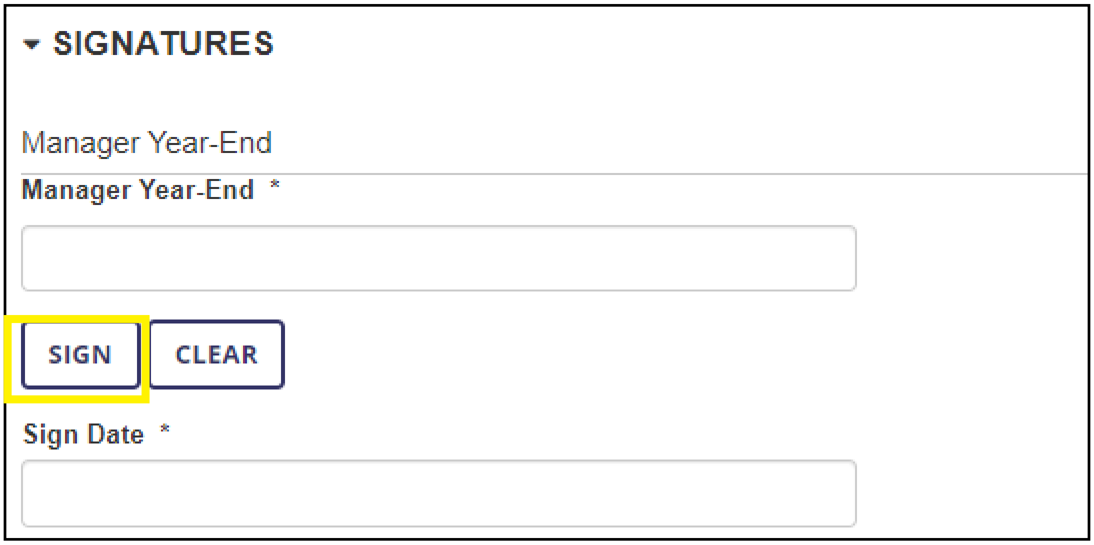


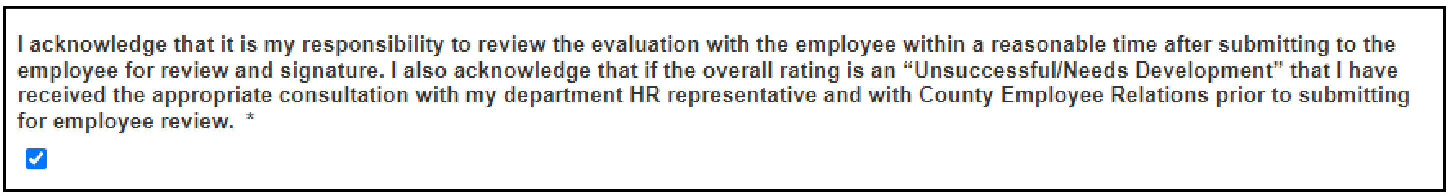
- When selecting the Manager Year-End Overall Rating, please utilize the Rating Legend.
- Click the down arrow in the box that says "Select," and add your Year-End Rating.



Evaluation Components: Signatures (Required)

- To enter your Year-End Signature, click on “Sign.” Your name and date will populate in the corresponding boxes.
- Check the “Acknowledgment” box under the signature.



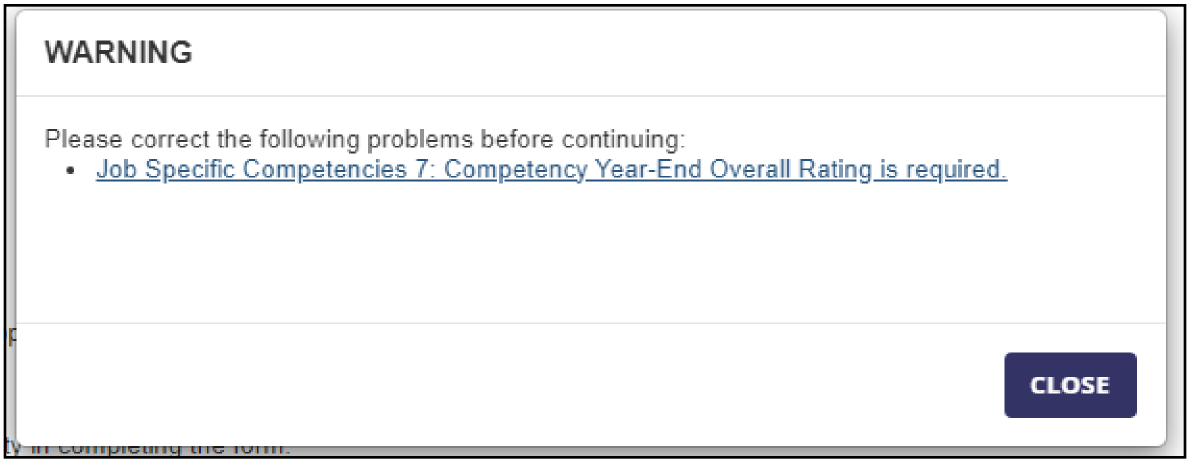


Evaluation Components: Attachments (Optional)

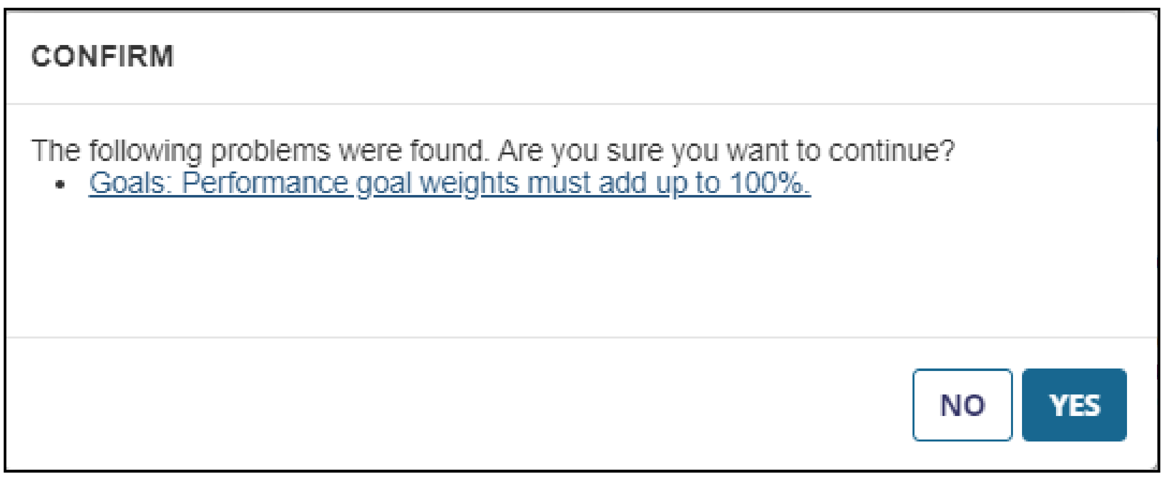
- In this section, add any attachments that you want as documentation for the evaluation.
    - This could be kudos from another manager or employee, a certification, or training transcript they earned during the year. Note: Once a document is added, you can delete it before the evaluation is finalized.

Submitting an Evaluation

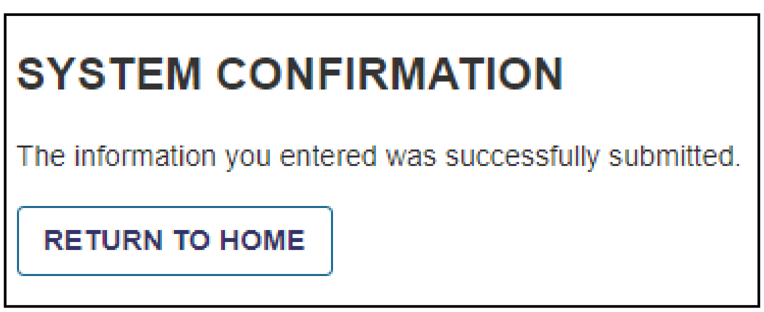
- Scroll up until you see the Tool Bar appear on the top of the evaluation. Review your form for completeness and utilize the spell/legal check tool.
- Click “Submit.” Once submitted, the completed evaluation is electronically submitted to your employee for their review, comments, and signature.
- *Note*: Upon clicking submit, if anything is missing in the evaluation, a warning box will pop up letting you know of any information that is needed prior to submittal:



- If everything is complete when you click submit, a window will pop up asking “Are you sure you want to submit?



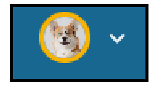
- Click “Yes” to continue, you will receive a confirmation of submittal.



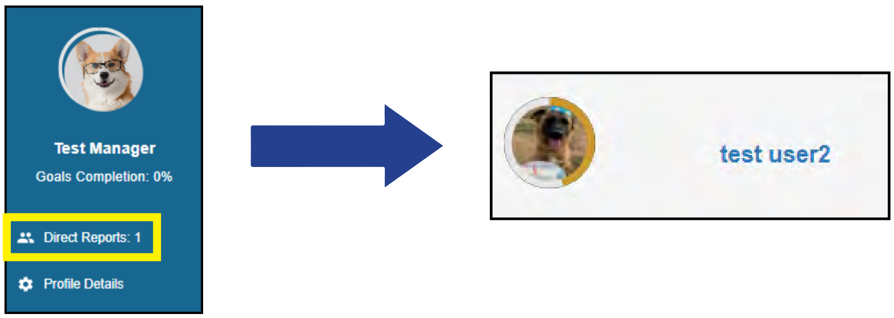
- The evaluation is sent to the employee’s “My Tasks” to review and acknowledge the evaluation.
- Once the employee has Acknowledged and submitted their evaluation the process will be closed.

Locating Completed Evaluations

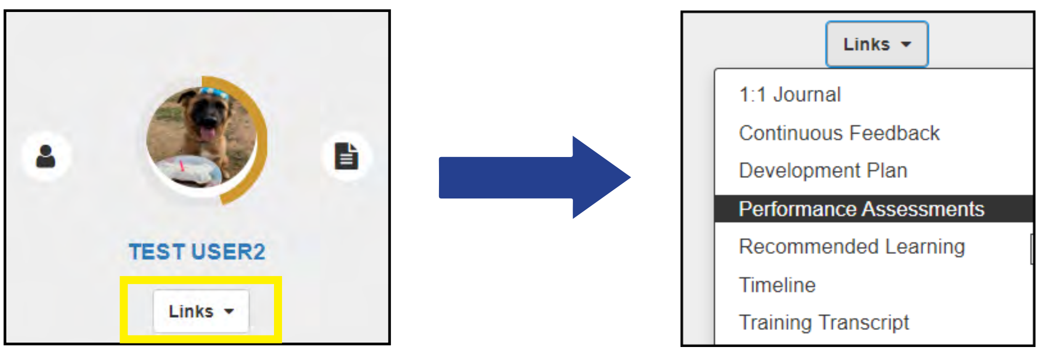
Once the evaluation has been submitted to the employee you are still able to access their evaluations any time moving forward. Below are the steps to access the completed evaluation, or view our tutorial in the RivCo Talent system.

1. Start by clicking on this icon on the top right corner of your home page: 

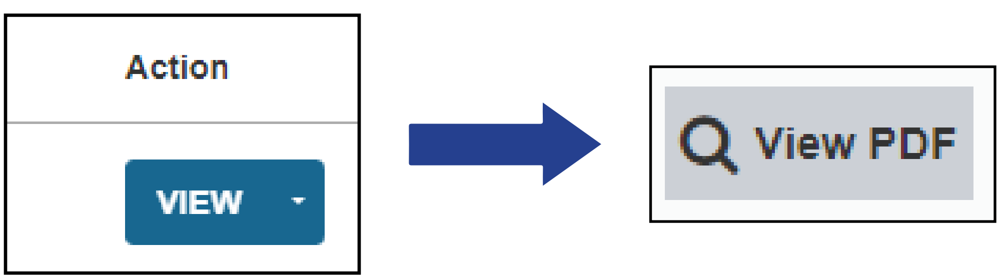
2. Next select “Direct Reports” and click on your employee’s name:



3. Click on “Links” and select “Performance Assessments”



4. Click on “View”, then select “View PDF” to access the completed evaluation.



Performance Recognition Plan (PRP) Evaluations

Performance Recognition Plan (PRP) evaluations are completed in RivCo Talent Performance. See below for additional information on completing PRP evaluations:

- PRP evaluations will be generated in the system 60 days before their due date of October 31st of each year.
- Compensation for PRP-related increases is not tied to when a PRP evaluation is submitted. The formal compensation process for PRP-related increases takes place at the end of each calendar year. Reach out the PRP Support Inbox: PRPSupport@rivco.org for additional information on this process.
- PRP evaluations utilize the County's competency model. See the information in the preceding sections of this guidebook, and the links in the Appendix, for additional information on the County's competency model

Completing a Performance Improvement Plan (PIP)

Below are the general steps completed in the RivCO Talent Process

- **Step 1 (Manager)**- Complete standard evaluation process where an overall unsuccessful rating is given.
- **Step 2 (Employee)**- Review and Acknowledge the submitted evaluation.
- **Step 3 (Manager)-** Complete a 60-day PIP Evaluation
- **Step 4 (Employee)**- Review and Acknowledge the 60-day PIP evaluation.
- **Step 5 (Manager)-** If the employee received an "Unsuccessful/Needs Development" in Step 3, then perform the final 60-day PIP evaluation.

This section outlines in detail the process for completing the PIP in the system.

Step 6 (Employee) - Review and Acknowledge final PIP.

First Unsuccessful Evaluation (Begin PIP Process)

1. The **manager drafts the evaluation and** gives the employee an overall annual rating of Unsuccessful/ Needs Development. (Save the evaluation, DO NOT Submit)
    a. The manager should also provide a draft copy of the unsuccessful evaluation to their own manager for review/approval before proceeding to the next step.
2. The **manager** reaches out to Employee Relations to review the draft evaluation, the draft Performance Improvement Plan (PIP), and obtain additional guidance.
    a. Contact via e-mail at HRInvestigationsUnit@rivco.org
3. The **manager** finalizes the evaluation and PIP in accordance with guidance and recommendations from Employee Relations and attaches the PIP to the draft evaluation.
    a. DO NOT attach discipline to the Performance Management System.
4. The **manager meets with the employee** to review and issue the evaluation, the PIP, and the corrective or disciplinary action.
5. The Manager clicks "submit" on the evaluation, and the employee receives the digital evaluation to acknowledge.

Second Unsuccessful Evaluation (due 60 days after submitting the first evaluation)

1. The **manager** drafts a second evaluation (Task name will appear as: (First Initial 60 day PIP evaluation)
    a. If the employee is now Successful, complete the evaluation to close the process.
    b. If the employee is still Unsuccessful, repeat steps 1-5.

    Note: Please refer to the section of this guidebook on how to complete a regular evaluation (page 37) or utilize the resources available on RivCo Talent and the Performance Management Website.

2. After repeating steps 1-5, update the Development tasks created in step 6 to match the most recent PIP.

Third/Final Unsuccessful Evaluation (due 60 days after submitting the second evaluation)

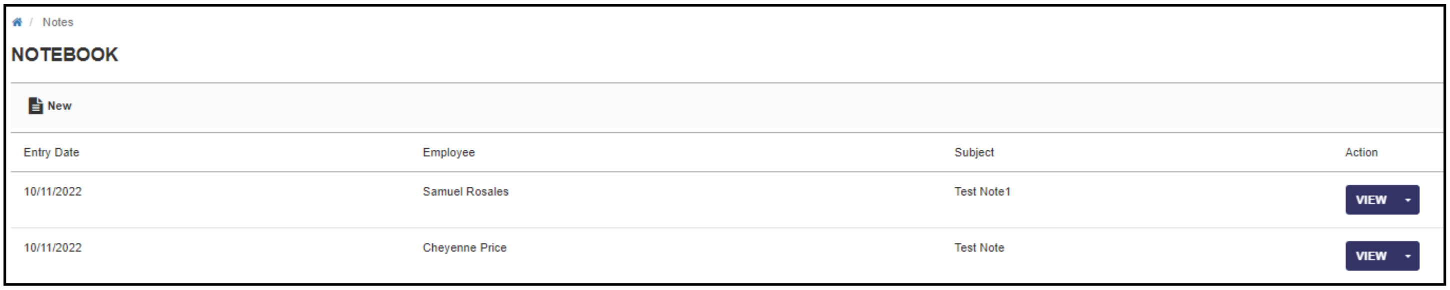
1. The **manager** drafts the final evaluation
    a. If the employee is now Successful, complete the evaluation to close the process.
    b. If the employee is still Unsuccessful, reach out to your Employee Relations representative for further instruction.

- **Important note:**
    - Once the manager submits the form it goes directly to the employee. If you make an error on the evaluation and need to change it after it has been submitted, contact your Department Administrator to route the evaluation back to you for revisions.

Notes Functionality

Track employee accomplishments, one-on-one meeting notes, or anything you'd like to include in an evaluation using the "Notes" feature in the system. All notes saved throughout the year can easily be accessed and pulled into an evaluation form!

Sample Notebook



Notes

NOTEBOOK

New

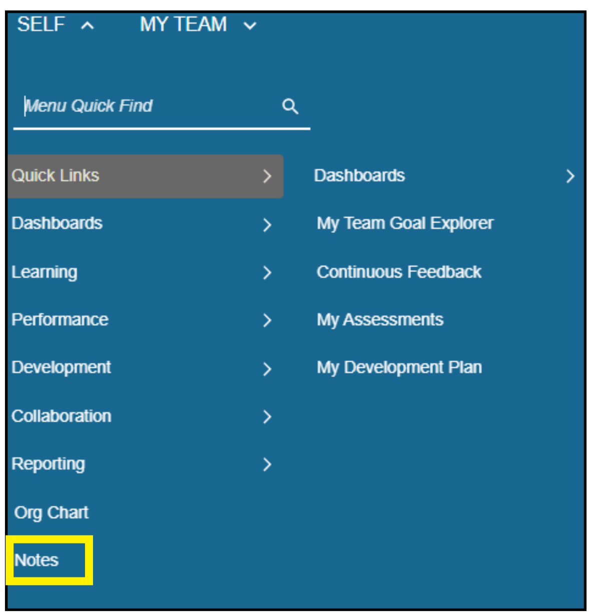
Entry Date	Employee	Subject	Action
10/11/2022	Samuel Rosales	Test Note1	VIEW
10/11/2022	Cheyenne Price	Test Note	VIEW

Notes Tips, Tools, and Tricks

- When completing a performance evaluation, you can add any applicable notes you've added to the system for your employee. Simply utilize the "Notes" tool at the top of the evaluation form, in the "Overview" section or you can access them in the comment box through the commenting assistance icon. Your employee notebook will populate with any applicable notes you can add for the employee you are reviewing.

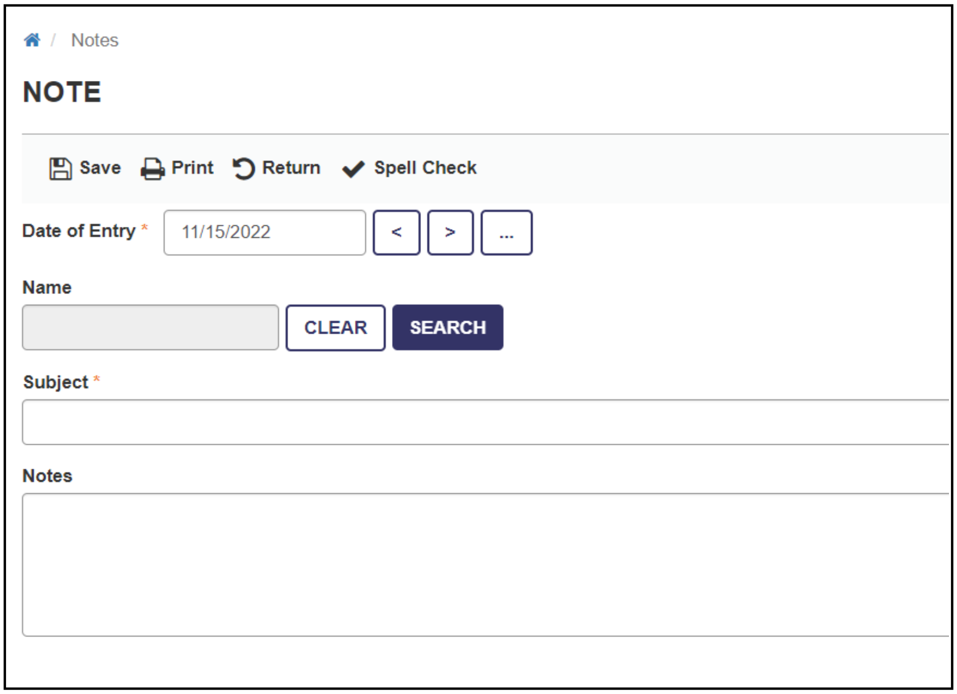
Creating a Note

- To create a note, navigate to the "Self" tab.
- Scroll down to "Notes"

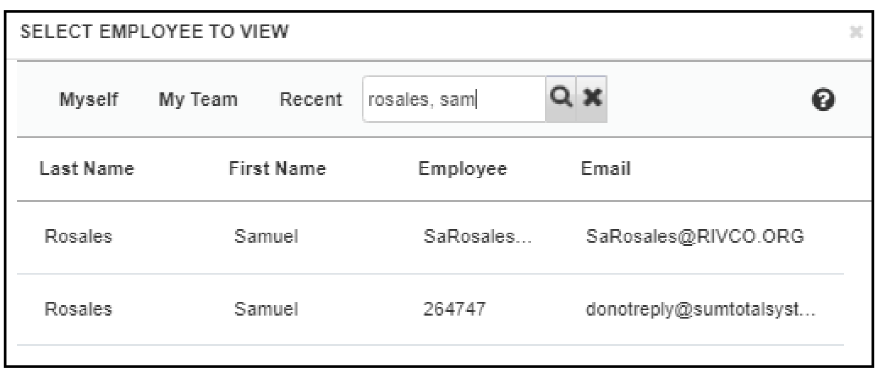


- If you want to create a new note, click "New"; or, if you want to edit an existing note, select "Edit" from its Action drop-down.

- The Note Details screen appears.



- The “Date of Entry” field pre-populates with the current date. Change the date, if desired; you can also use the arrow buttons to increment/decrement the date by a day or you can click on the 3 dots and select the date from a calendar.
- If the note is regarding another employee, next to the “Name” field, click “Search” and use the employee search to select an employee. The user’s name will populate in the name field.



- Enter the subject of the note. The Subject will help distinguish the note when you view your library of notes on your Notebook screen.
- Enter the body of the notes in the “Notes” field.
- Click “Save” to save the note. Otherwise, you can print the note, return to the previous screen, or spell check the content of your note for spelling errors or typos.
- Upon saving, the new note you created will appear in your Notebook. You can either view or delete your new note utilizing the “View” button.
- If you want to delete a note, Click “Delete” in the note’s Action drop down.

Frequently Asked Questions

See below for answers to some common Frequently Asked Questions (FAQs). If your question is not answered here, please reach out to HR's Performance Management team at PerformanceMgmt@Rivco.org.

Q: How do I log in to the system?

A: Navigate to https://corlearning.sumtotal.host to log in to the system. If you are on the County network, you will be signed into the system through Single Sign On (SSO).

Q: Are there any trainings I can take on how to utilize RivCo Talent Performance?

A: Yes! We have several tutorials available to you on the homepage of RivCo Talent which will walk you through various features within the system.

Q: Should I be referencing the old EPM system to see when Evaluations are due?

A: No. The EPM and RivCo Talent use different logic when determining when to generate evaluations. RivCo Talent now generates evaluations based on the employee's **job-entry** date, whereas the EPM simply looked at whether the employee had an evaluation in the past 365 days.

To see when your employee's evaluation will be due in the new system, simply go to your employee's profile to see what their job entry date is. The evaluation will generate 60 days before their anniversary date.

Q: What is a competency model?

A: A Competency Model is a set of competencies that collectively defines the requirements for effective performance in a specific job, profession, job level, or organization. Competencies included in the County's competency model come from the Korn Ferry Leadership (KFLA) competency library, which includes 38 competencies.

Q: How are competencies auto populated to jobs in the system?

A: Competencies are auto populated in the system based on job level. Each classification in the County has been assigned to one of the following 6 job levels: Clerical/Trades/Labor, Technical/Paraprofessional, Professional, Management/Supervisor, Department Executive, and County Leadership. Each job level has approximately 4-5 different competencies assigned to it that will auto-populate on an evaluation in the system.

Q: Are there any trainings on how to utilize competencies in an evaluation?

A: Yes. We have an on-demand training that discusses what competencies are, how to utilize them, and how to discuss them with staff. To access that training: Click Here. You can also access our KFLA Competency library: Click Here

Q: What are the four steps of the Performance Management Cycle?

A: The four steps of the Performance Management Cycle are PLAN, ACT, TRACK, and REVIEW. Please see page 9 of this guidebook or access our on-demand Performance Management training for more information on each phase of the Performance Management Cycle.

Q: What is a competency?

A: A competency is a cluster of highly interrelated attributes, including knowledge, skills, and abilities (KSAs) that give rise to the behaviors needed to perform a given job effectively. Competencies can be either technical or behavioral in nature.

Q: What is the new 3-point evaluation rating scale?

A: The new 3-point evaluation rating scale consists of Exceptional, Successful, and Unsuccessful/Needs Development. See page 38 in this guidebook for more information on the new evaluation rating scale.

Q: Who do I contact if I can't log in to the system?

A: If you are having difficult logging in, contact the IT Help Desk at 951-955-9900. The Performance Management team does not have access to reset passwords or login information.

Q: Who do I contact if my information in the system is incorrect?

A: If your information in RivCo Talent Performance is incorrect, contact your Departmental PeopleSoft administrator. All information (with the exception of some information in the Talent Profile/Resume section) is populated via a nightly data feed from the PeopleSoft system. Your Departmental PeopleSoft administrator will need to rectify any inaccurate information currently in PeopleSoft.

Q: What is a development plan? How do I create one in the system?

A: As an employee or manager, you can use the Development Plan to assemble and track activities and goals that are specially tailored to help you or your employees grow and develop. See page 19 in this guidebook for step-by-step instructions on creating and managing development plans in the system.

Q: Who can access and view my current and past performance evaluations in the system?

A: Your current and past performance evaluations in the performance management system are viewable by you, your manager/supervisor, and up your chain of command.

Q: Who can access and view my goals in the system?

A: Your goals in the performance management system are viewable by you, your manager/supervisor, and up your chain of command.

Q: Can I use my Talent Profile/Resume to apply for County jobs?

A: No. information stored in the Talent Profile/Resume section of the system is not connected to the County's recruiting system and cannot be utilized to apply for County employment.

Additional Information

Utilize the resources below for additional information on the performance management system and the County's Performance Management Framework!

Board of Supervisors Policy C-21

HR Learning & Organizational Development Website

Skillsoft Online Learning Library

E-mail the Performance Management Team

RivCo Performance Management

RivCo Talent - Performance Management Demo

Appendix/Resources

Board of Supervisors Board Policy C-21

Countywide Competency Model

E-mail Performance Management Team

HR Learning & Organizational Development Website

Korn Ferry Leadership Architect Competency Library

RivCo Performance Management

RivCo Talent - Performance Management Demo

Resources: KFLA Competencies

SkillSoft Online Learning Library

SMART Goals Worksheet

View/Enroll in iLoveFeedback Course

View/Enroll in Coaching Course

RIVCO 1HR

learning & organizational development

COUNTY OF RIVERSIDE, HUMAN RESOURCES
ATTN: LEARNING & ORGANIZATIONAL DEVELOPMENT
4080 LEMON STREET, 7TH FLOOR RIVERSIDE, CA 92501
(951) 955-3256