

COUNTY OF RIVERSIDE  
**PERFORMANCE  
MANAGEMENT  
GUIDEBOOK**

**RIVCO**   
**TALENT**

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## How to Utilize this 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 Practice
- Information on Riverside County's Performance Management System, SumTotal 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.”

## 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 on-going 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 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 encourage 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 that 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.

# County of Riverside Performance Management Framework & Philosophy

## Job Levels

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

- Clerical/Labor/Trade**
- Paraprofessional/Technical**
- Professional**
- Manager/Supervisor**
- Department Executive**
- County Leadership**

JOB LEVEL	COMPETENCY CATEGORIES			
	F1: Thought	F2: Results	F3: People	F4: Self
<b>Clerical/Trades/Labor</b>	Customer Focus	Ensures Accountability	Values Differences	Self-Development
<b>Technical/Paraprofessional</b>	Customer Focus	Ensures Accountability Plans and Aligns	Values Differences	Self-Development
<b>Professional</b>	Customer Focus Manages Complexity	Ensures Accountability Resourcefulness	Values Differences Communicates Effectively	Self-Development
<b>Management/Supervisors</b>	Customer Focus Decision Quality	Ensures Accountability Directs Work	Values Differences Develops Talent	Self-Development Instills Trust
<b>Department Executive</b> <i>(Including Assistant Directors, Deputy Directors and equivalent executive titles in Departments)</i>	Customer Focus Strategic Mindset	Ensures Accountability Drives Results	Values Differences Drives Vision and Purpose	Self-Development Demonstrates Self-Awareness
<b>County Leadership</b> <i>(including CEO, CAO, COO, Deputy CEOs, Assistant CEOs, Department Heads)</i>	Customer Focus Cultivates Innovation	Ensures Accountability Action Oriented	Values Differences Organizational Savvy	Self-Development Courage

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 having higher retention rates, greater performance, and an overall positive culture within the workplace.

Four benefits of effective performance management are presented below:

- **Clarifying an employee's role and status.** Performance management helps clarify the employee's role and status in the organization. Some workers 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 gives the employee an opportunity 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.

## County of Riverside Managers and Supervisors: Your Role in the Performance Management Process, cont'd

### 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 you employees up for success. Providing all this to your employee’s will lead to improved productivity, engagement, increased employee retention, and encourages 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 to 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 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.

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 System

The County of Riverside utilizes SumTotal Performance as its performance management system. SumTotal Performance 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 can be aligned to goals in the system and are a component of the evaluation form in the system
- **Managing Employee Goals:** Utilize the system to create, track, and assess your employees 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, 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 and 1:1 Feedback:** Request and provide continuous feedback in the system. Create 1:1 journals between Managers and employees 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!
- **Talent Profile/Resume Functionality:** The Talent Profile/Resume houses important information such as licensures, education, and languages. Information shown in your Talent Profile/Resume is populated from PeopleSoft and refreshes on a nightly basis.

The screenshot displays the RIVCO HR Learning Management System (LMS) interface. At the top, the header includes the RIVCO HR logo, user navigation options (SELF, MY TEAM), and a search bar. The main content area features a large blue banner with the text "What would you like to learn today?" and a search input field. Below the banner are six circular icons representing different learning categories: Customer Service, Strategy & Metrics, Certifications, Leading People, MS Office, and Skillssoft Bootcamps. At the bottom, there is a dark blue navigation bar with links for "My Required Training", "My Training Schedule", "My Transcript", and "My LMS Help Page".

## Important System Terms & Definitions

**“My Team” tab:** If you are a manager or supervisor and have employees that 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.

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

**“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.

**Timeline:** Use your Timeline 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 “Timeline” 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 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 “Timeline.”

## Getting Started with SumTotal Performance Management System

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.

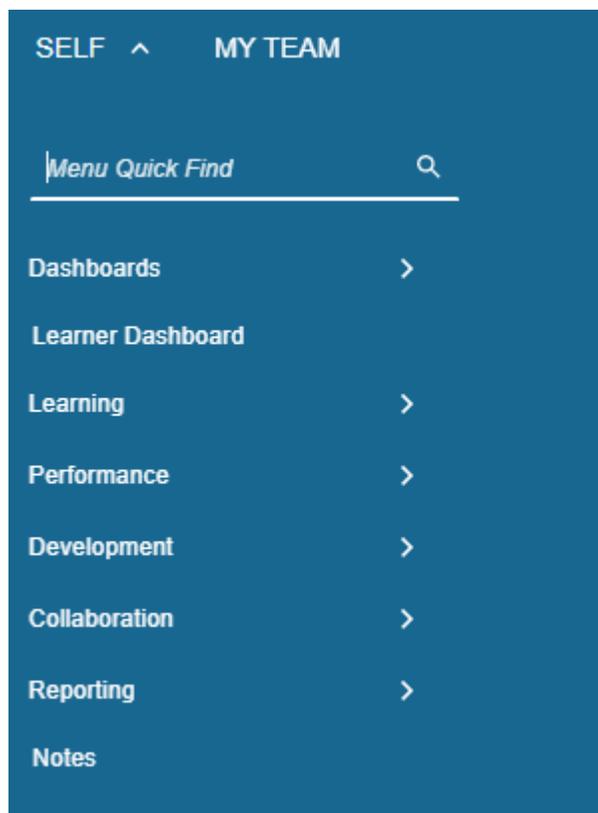
### Log in to the system:

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

Click [HERE](#) to access SumTotal Performance

### General navigation:

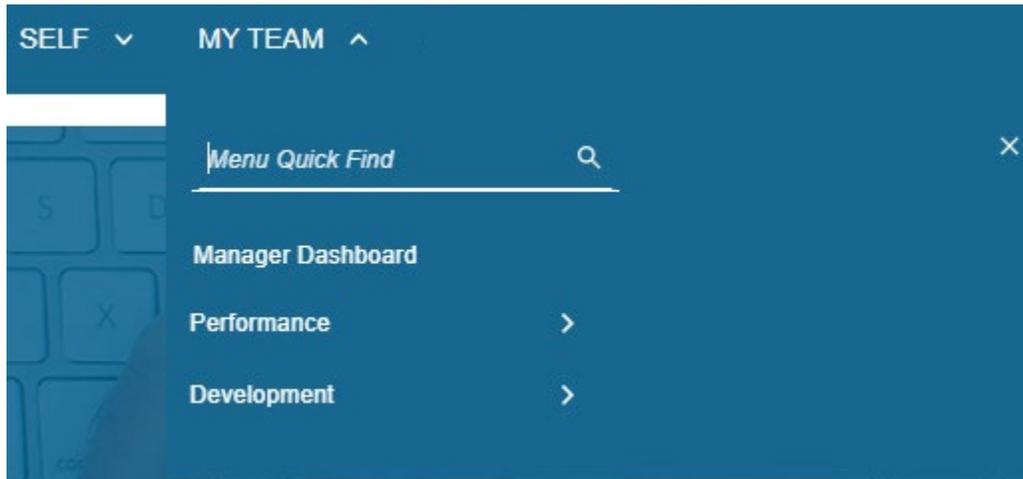
- Navigate to the “Self” tab on the top left-hand side of the screen. Here, you will find the following menu options:



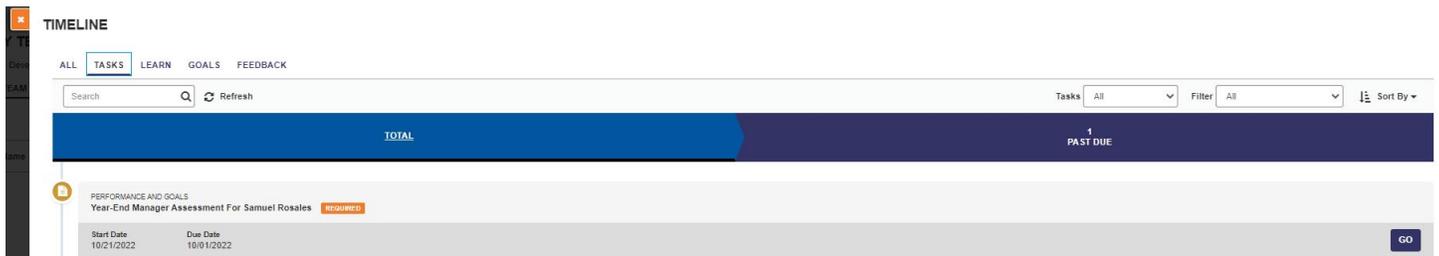
- Utilize the Performance menu to:
  - Access your own performance evaluations and goals, as well as your goal plan.
- Utilize the Development menu to:
  - Access your own development plan or run a competency, skill, or training analysis.
- Utilize the Collaboration menu to:
  - Access the Continuous Feedback tool.

## Getting Started, cont'd

- 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 Performance menu to:
  - Access the “Batch Print Wizard,” where you can print evaluations for your team.
- Utilize the Development menu to:
  - Access your team’s development plan.
- Navigate to your “Timeline” on the left-hand side of the screen.
  - o Click on “Tasks”
  - o If a performance evaluation for one of your employees is due, it will populate as a task in your timeline. Click “Go” on the 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.
- SumTotal 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, 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](mailto:PerformanceMgmt@Rivco.org).
  - To update degrees, certifications, and/or licenses that have populated in the system: Please update in PeopleSoft through Employee Self Service. See the Talent Profile/Resume section of this guidebook for more information.

## Managing Employee Goals

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 completion of each goal and are populated to the performance evaluation form. Each form populated to 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:

[Home](#) / My Goals

#### GOAL PLAN FOR JOHN Q. SAMPLE - 2023 GOAL PERIOD

 New  Copy  Drill Up  Drill Down <span style="float: right;">  Filter By              Clear Filter           </span>						
<input type="checkbox"/>	Name	Type	Weight	Status	Due Date	
<input type="checkbox"/>	Career Counseling Ce...	Performance Goal		In Draft	11/30/2022	  

### 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 the next evaluation period.
- You can align your Goals to your Manager or Organization if they are available.
- You have the ability to 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:
  - Navigate to Self -> Performance -> My Goals
- If you want to create a new personal goal for an employee, from that employee's Goal Plan, click New Look at “Target Recipient” and verify your name.
- 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.
- 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 a Performance form).
- Enter a detailed description of the goal, including specific objectives and any metrics.
- As the goal period progresses, use the “Results Achieved” field to include any results that the employee has achieved toward completing the goal.
- By default, the current (most recent) Goal Period is selected. Goal periods help to differentiate between goal assessment periods. If you want to assign the goal to another goal period, select it from the drop-down.
- Enter a relative importance Weight for the goal, as it will be rated against other personal goals. A higher rating indicates a goal that is more important and will therefore weigh more greatly in the overall rating of the goal.
- Specify a Start Date and End Date for when you expect the goal to be completed.



## Managing Employee Goals, cont'd

### 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

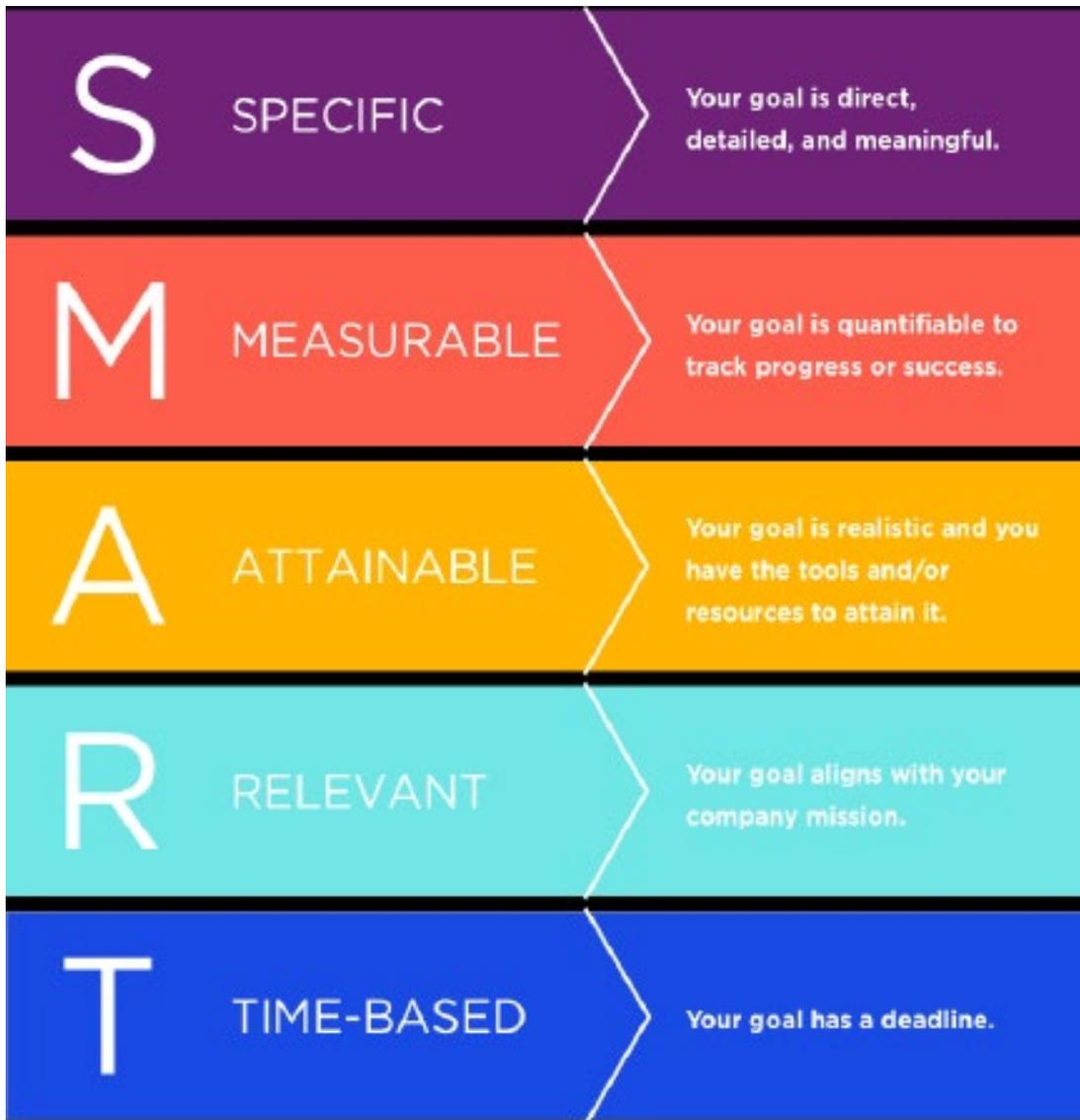
##### Suggested Goal Description

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

## Managing Employee Goals, cont'd

**Creating SMART Goals**

Goals setting is an important component to 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, Achievable, Relevant and Timely). 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 earn 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 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. 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:

My Development Plan Print View Comments

#### MY DEVELOPMENT PLAN

**PROGRESS: ALL**

View the progress of tasks in your Development Plan as per your selection.

0% Completed

0% In Progress

0% Not Started

**OBJECTIVES**

Organize your tasks within Objectives.

Add Objective

Default Objective

**TASKS: ALL**

+ Add Task
Development Wizard
+ Move to Objective
Filter

Applied Filters: All

ALL
COMPANY
PERSONAL

	Task Name	Origin	Jobs, Competencies	Due Date	Progress	Status	Actions
No records found							

### 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 SumTotal, 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.

## Managing Employee Development Plans, cont'd

### 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 in 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 Plan Period this activity applies to. (Optional)
- Enter 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.

## Managing Employee Development Plans, cont'd

### ADD LIBRARY TASK

**Select Activity \***

**Description**  
 \*\*\*A \$25 FEE WILL BE BILLED FOR CANCELLATIONS AFTER THE DEADLINE AND FOR NO-SHOWS\*\*\*<LB><LB> For some supervisors, discipline may be viewed as synonymous with punishment, a method of exerting control over one's employees. In a more constructive sense, however, discipline can be viewed as action taken to help employees correct and improve their performance and behavior, so the full benefit of their potential and contributions can be realized. However, if we are unsure of the proper action to take and wary of the perceived legal and administration implications, it can lead to reluctance to do anything. This

**Activity Type**

**Plan Period(s)**  
 2023 Goal Period  
 System Default Goal Period  
 2022

**Start Date**  
   
(MM/DD/YYYY)

**End Date**  
   
(MM/DD/YYYY)

**Objective**

**Progress**

**Completion Status**

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.

### 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:
  - Develop for a current position: Develop for a position you currently hold.
    - Select the position for which you want to develop from the menu.
  - Pick from all competencies: Develop for competencies you select.
  - 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.

### DEVELOPMENT WIZARD



#### STEP 1: CHOOSE WHAT TO DEVELOP

This wizard will guide you through creating customized goals based on your personal information. Select the type of development plan and click on 'Next'.

Pick from all competencies  
 Develop for an aspirational job  
 Develop for a specific job

- Click “Next”.

### DEVELOPMENT WIZARD



## Managing Employee Development Plans, cont'd

- 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.

**DEVELOPMENT WIZARD**

Choose What to Develop      Rating Information      Review Strengths and Weaknesses      Add Development Task

**STEP 2: RATING INFORMATION**  
 Previous ratings are reflected below. For unassessed competencies, feel free to provide a rating as a baseline for development.

Action Oriented	--Select--
Attracts Top Talent	--Select--
Balances Stakeholders	--Select--
Being Resilient	--Select--
Builds Effective Teams	--Select--

- 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.

**DEVELOPMENT WIZARD**

Choose What to Develop      Rating Information      Review Strengths and Weaknesses      Add Development Task

**STEP 3: REVIEW STRENGTHS AND WEAKNESSES**

**ASSESSED COMPETENCIES**

Competency	Rating	Target Rating	Gap
<input type="checkbox"/> <b>Action Oriented</b> - Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm. - Readily takes action on challenges, without unnecessary planning. - Identifies and seizes new opportunities. - Displays a can-do attitude in good and bad times. - Steps up to handle tough issues.	2		
<input type="checkbox"/> <b>Balances Stakeholders</b> - Anticipating and balancing the needs of multiple stakeholders.	1		

- 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.

## Managing Employee Development Plans, cont'd

### DEVELOPMENT WIZARD



#### STEP 4: ADD DEVELOPMENT TASK

##### MAP TO OBJECTIVE

Default Objective ▼

##### COMPETENCIES (2)

Balances Stakeholders ○ **Action Oriented** ○

##### Action Oriented

Taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm. - Readily takes action on challenges, without unnecessary planning. - Identifies and seizes new opportunities. - Displays a can-do attitude in good and bad times. - up to handle tough issues.

##### Suggested Learning Activities

The learn activities below are displayed based on your selection for development

- Becoming Your Own Best Boss**: Have you ever tried managing yourself? Perhaps you could...
- Big Potential: How Transforming the Pursuit of...**: This audio edition shows that success and happiness are not...
- Blind Ambition: How to Envision Your Limitless Potential and Achieve Success** by Patricia Walsh
- Blind Ambition: How to Envision Your Limitless Potential and Achieve Success**
- Check in Strategy Journal: Your Daily Tracker...**: Offering a time management solution, in the form of a daily and weekly syst...
- Developing a Growth Mindset**: In the workplace, there are two specific types of mindsets, or a...
- Developing a Plan to Further Your Career**: The whole notion of what a career is has changed. You are no...

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

ALL FEEDBACK
1:1 JOURNAL
MY FEEDBACK
PROVIDED
REQUESTS RECEIVED
REQUESTS SENT

▼ Filter
➕ Provide Feedback
➕ Request Feedback
➕ Create 1:1 Journal

Sort ▼ Date ≡

Displaying 3 of 3 records    10   25   50   100

Emma Edison has requested your feedback

🚩

**Lumina Project**

What were your thoughts on our recent project with Lumina?

VIEW

Date	Due Date	Linked Items
11/28/2016	02/28/2017	1

You provided feedback for Steve Reese

🚩

ABOVE AND BEYOND

**Awesome Job On Strategic Account**

This is a great example of how teams can work together!

VIEW

Date	Category	Impact	Linked Items
09/30/2016	Recognition	--	0

## Continuous Feedback, cont'd

### Continuous Feedback Tips, Tools, and Tricks

- 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.

### 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?

## Continuous Feedback, cont'd

### • 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 and the feedback provider, and after the feedback is supplied, the target employee, and the employee's direct manager.

REQUEST NEW FEEDBACK

Enter Feedback Request    Review Feedback Request and Submit

Feedback for:

Due Date:

+ New Reviewer

Feedback Provider:  Actions

Subject:

Description:

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.
- Enter all or part of the employee’s first name, last name, or Employee ID. The system displays any matching results as you type.

## Continuous Feedback, cont'd

- Select the desired employee from the list of results.
- To add a new reviewer of the feedback, 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.

To provide feedback, follow the steps outlined below:

- 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.

## Continuous Feedback, cont'd

- 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.”

### PROVIDE FEEDBACK



Provide Feedback for Whom \*

Type

Subject \*

Comments \*

Category

Impact

Provide Feedback for Employee | Review Feedback and Submit

### ADDITIONAL QUESTIONS

Feedback Template

Ad-Hoc Questions

Select any pre-set questions you would like to include in your provided feedback

+ Add

No feedback questions

## Continuous Feedback, cont'd

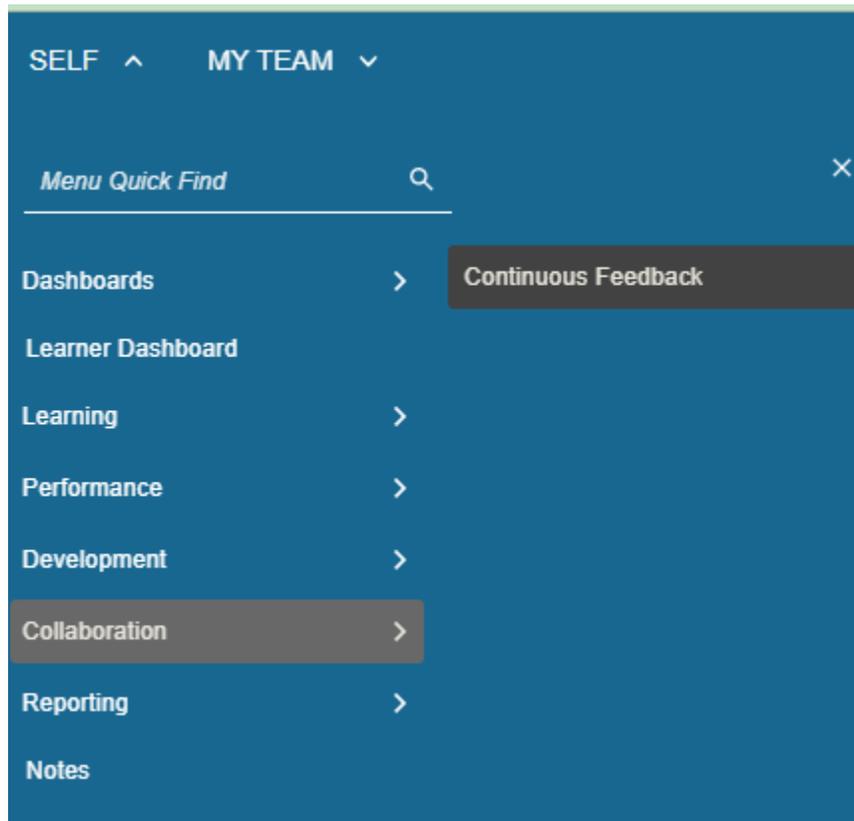
### Creating a 1:1 Journal

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 Collaboration -> Continuous Feedback.



## Continuous Feedback, cont'd

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

### NEW 1:1 JOURNAL

The screenshot shows the 'NEW 1:1 JOURNAL' form. At the top right, a progress indicator shows two steps: 'Enter Journal' (current) and 'Review and Submit'. The form fields are: 'Create a 1:1 Journal With \*' (a search bar with a magnifying glass icon), 'Reminder' (a dropdown menu with 'None' selected), 'Subject \*' (a text field), and 'Description \*' (a rich text editor with a toolbar). The toolbar includes options for bold, italic, underline, strikethrough, text color, background color, bulleted list, numbered list, indent, outdent, link, unlink, and undo.

- 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. 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:** Goals assigned to the current review period will auto-populate to the evaluation. Review, and add any as applicable.
- **Development Plan:** Utilize this section of the evaluation to identify any activities to complete that will assist in 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, process will begin in the system and is a four to six-step process between you and your employee. The PIP process in the system is detailed below.

**Note:** Before you hit submit on your employee's "Unsuccessful/Needs Development" evaluation, please reach out to your Chain of Command as well as the Employee Relations Team for guidance.

- **Step One (Manager)** - This step kicks off 10 days after submitting the "Unsuccessful/Needs Development" evaluation. You will only be able to add in Tasks in the Development Plan that your employee will need to work on for the next 60 days.
- **Step Two (Employee)** - Review the PIP evaluation and work on identified tasks in Development Plan.
- **Step Three (Manager)** - Complete a 60-day PIP Evaluation, where you will be working on these areas:
  - **Competencies:** Competencies, based on job role, will auto-populate to the evaluation. Provide a year-end overall rating for each competency.
  - **Goals:** Goals assigned to the current review period will auto-populate to the evaluation. Review, and add any as applicable.
  - **Development Plan:** Utilize this section of the evaluation to identify any activities to complete that will assist in 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**
- **Step Four (Employee)** - Review and Acknowledge the 60-day PIP evaluation. If the employee is rated as "Successful" or higher on this step, then the process is complete. If they received an "Unsuccessful/Needs Development," the process will continue to step five.
- **Step Five (Manager)** – Perform final PIP evaluation, covering all the same areas that were in the 60-day PIP evaluation. Please refer to step three If employee is rated as "Successful" or above, the process is complete. If the employee received an "Unsuccessful/Needs Development," then the manager will reach back out to Employee Relations and the process will continue.
- **Step 6 (Employee)** - Review and Acknowledge final PIP. If the employee received a "Successful" or above rating, the process is closed out. If the employee received an "Unsuccessful/Needs Development," the PIP process will continue.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### Sample Regular Performance Evaluation

2023 ANNUAL PERFORMANCE EVALUATION FOR **SAMUEL ROSALES** 

Manager: Empty Manager

**OVERVIEW**

Utilize this form to complete the 2023 performance evaluation. The tools below can be utilized to:

- Save your progress
- Submit once complete
- Request feedback from another manager
- Print a summary of the evaluation
- Copy and paste applicable Notes into the comment sections below – (original) Add in any applicable notes on the individual being evaluated
- 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.

 Save
  Submit
  Request Feedback
  Print Summary
  Notes
  Go To
  Spell/Legal Check

**COMPETENCIES**

For more information on each competency, including definition and behavioral descriptions for each rating, please click on the arrow to expand each competency listed below.

**Competencies**

Year-End Overall Rating \*

---

**OVERVIEW**



Utilize this form to complete the 2023 performance evaluation. The manager/supervisor has 30 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 (Employee-Relations@RivCo.org) prior to submitting the completed evaluation.

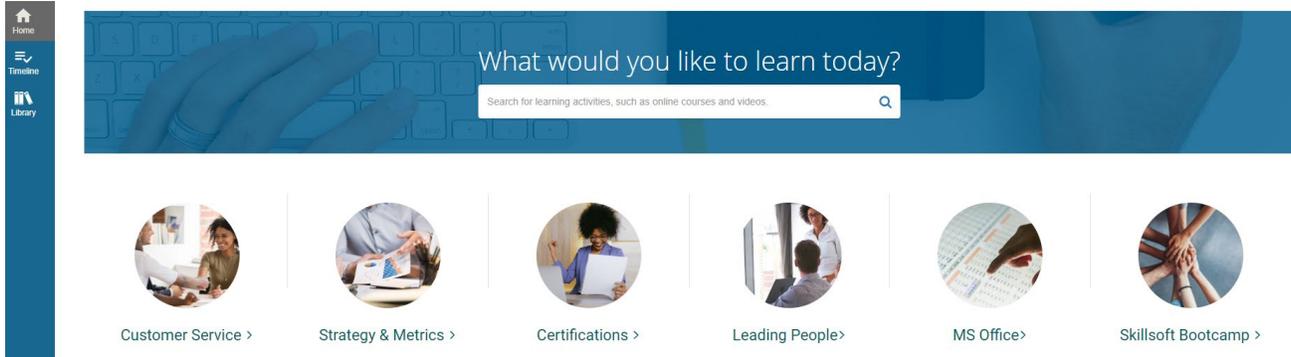
### Performance Evaluation Tools, Tips, and Tricks

- A performance evaluation will populate as a Task in your Timeline 30 days prior to when it is due.
- 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 43 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.
- 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 prior to submitting a rating of Unsuccessful/Needs Development in the system.

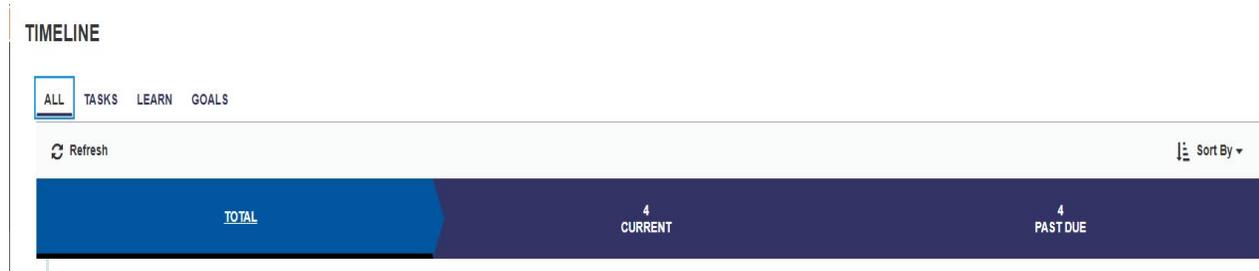
## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### Completing an Evaluation in SumTotal

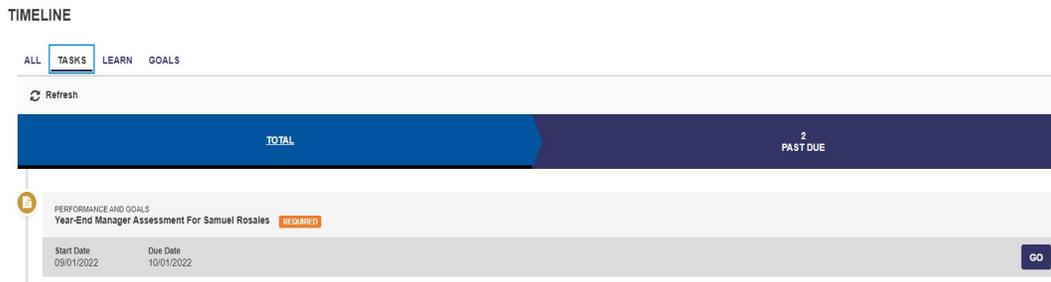
- To start an evaluation in SumTotal Performance, sign into the system here: <https://corlearning.sumtotal.host/>
- Once logged in, you will see your profile page.
- On the left corner, click on the “Timeline” icon to access any evaluations ready to be completed. All evaluations are generated 30 days 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.

OVERVIEW



Utilize this form to complete the 2023 performance evaluation. The manager/supervisor has 30 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

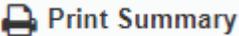
## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

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

- Let's quickly review these tools:

 **Save** Use the save icon to save your progress.

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

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

 **Notes** 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.

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

 **Spell/Legal Check** 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

- 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 training found in the Learning Management system. A link to this training can be located in the Appendix of this guidebook.
- 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.

Competencies

▼ Collapse All

▼ Decision Quality Year-end Rating \*  
- Select -

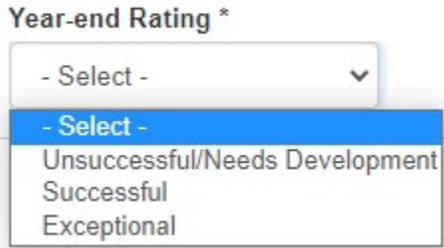
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Making good and timely decisions that keep the organization moving forward.

- Makes sound decisions, even in the absence of complete information.
- Relies on a mixture of analysis, wisdom, experience, and judgment when making decisions.
- Considers all relevant factors and uses appropriate decision-making criteria and principles.
- Recognizes when a quick 80% solution will suffice.

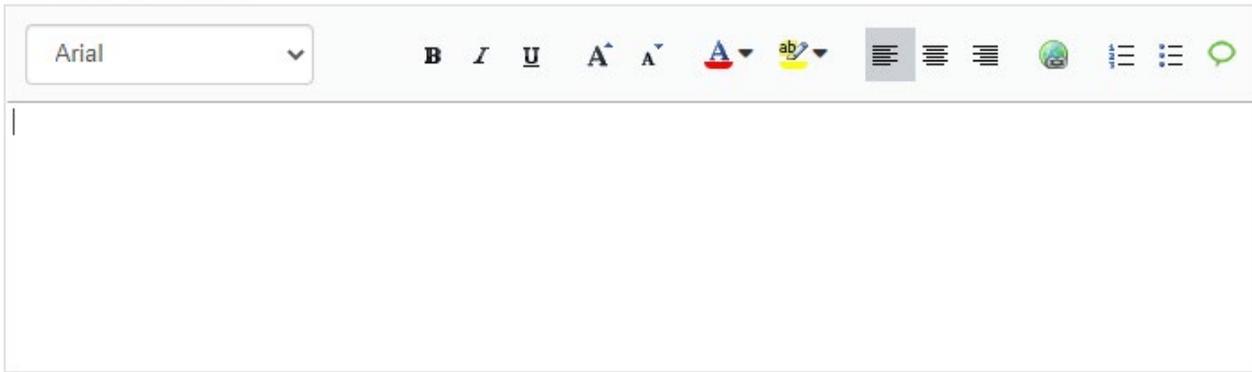
- Once expanded, you will see "Year-End Rating." Click the down arrow to select the appropriate rating.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

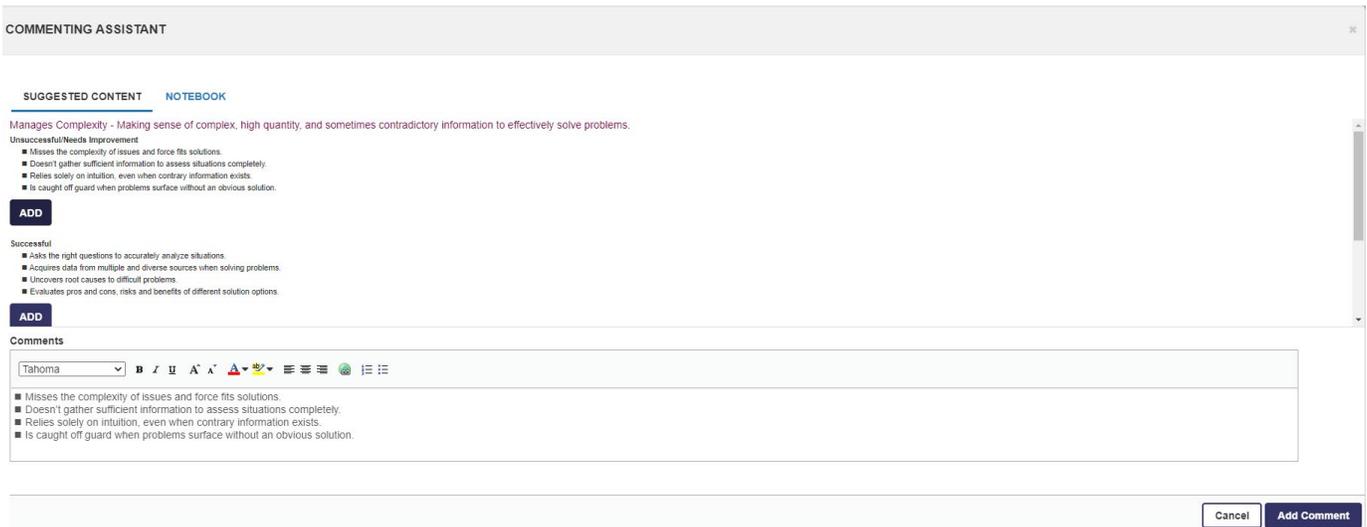


- Year-End Comments box: Utilize this box to add in any comments that justify the rating you have given your employee. In this section you can refer to your notes tool. Utilize it by copying and pasting notes you have for the employee from the past year’s 1:1 meetings and any kudos you have received for the employee. These can all be added in the corresponding competencies comment sections.

### Year-End Comments



- 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.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### Manages Complexity

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

**B** *I* U **A<sup>+</sup>** **A<sup>-</sup>**

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

Employee - Engagement Weight: ✔ On Track 0%

---

🗑️ Delete 🕒 Audit History

**Name \***

**Description \***

Tahoma B I U A<sup>+</sup> A<sup>-</sup> 🔍 🌐 📄 📌

Increase: Employee - Engagement  
 Date: March 2023  
 Baseline: Never see each other  
 Results: See each other quarterly

**Results Achieved**

Tahoma B I U A<sup>+</sup> A<sup>-</sup> 🔍 🌐 📄 📌

**Aligned To**

**Weight**

**Start Date**

**End Date**

**Share with Team**

**Completion Status \***

**Percent Complete**

- In this section you are also able to add a new Goal for this evaluation by clicking “+Add.”

### GOALS

+ Add    » Collapse All

## Evaluation Components: Development Plan Section

### DEVELOPMENT PLAN

Please utilize this section to identify any activities to complete that will assist in development for current or future role.

📁 Expand All   ✎ Edit

---

▶ Default Objective 4%

▼ Communicate effectively 0%

- 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 SumTotal (coming soon), or the Development Plan section of this guidebook.
- You can expand the different Development Plans that have been created, edit any that have been created, or add a new one if needed.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### ▼ DEVELOPMENT PLAN

Please utilize this section to identify any activities to complete that will assist in development for current or future role.

☑ Expand All
 Edit

### 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).

★ Rating Legend

**Rating Scale Legend**

Other Role Rating	The highlighted rating option is a readonly information showing the self rating given by the assessment owner at previous step.
Unsuccessful/Needs Development	<p><b>Unsuccessful/Needs Development</b> 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.</p> <p><b>Successful</b> 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.</p> <p><b>Exceptional</b> 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.</p>
Successful	
Exceptional	

### Evaluation Components: Overall Comments

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.

#### Overall Comments

##### Manager's Year-End Comments \*

Tahoma ▼

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A<sup>-</sup>
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- 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.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### Overall Ratings

Manager Year-end Overall Rating \*

- Select -

---

- Select -

Unsuccessful/Needs Development

Successful

Exceptional

### ▼ SIGNATURES

#### Evaluation Components: Signatures

- 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.

#### ▼ 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. \*



#### Evaluation Components: Attachments

#### ▼ ATTACHMENT(S)

Please upload any supporting documents.

Filename

Actions

Choose File No file chosen

ADD

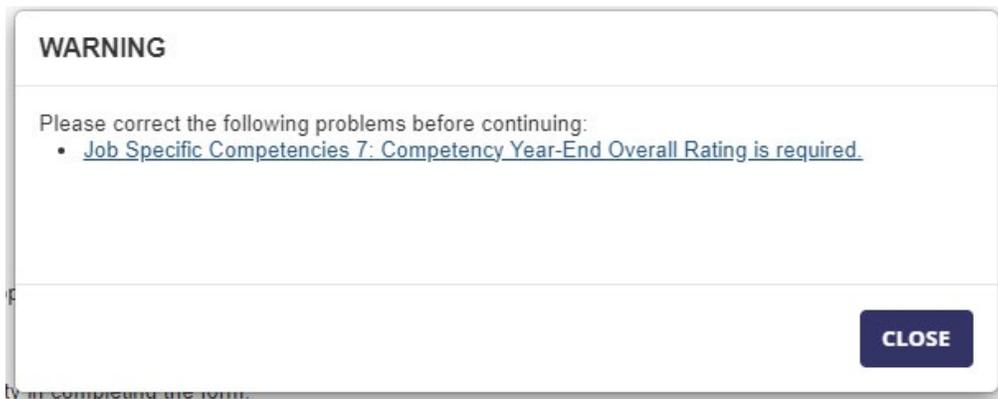
- In this section, add any attachments that you want as documentation for the evaluation.
  - This could be kudos from another manager or employee, a certification, or training transcript they earned during the year. Note: Once a document is added, you are able to delete before the evaluation is finalized.

#### Submitting an Evaluation

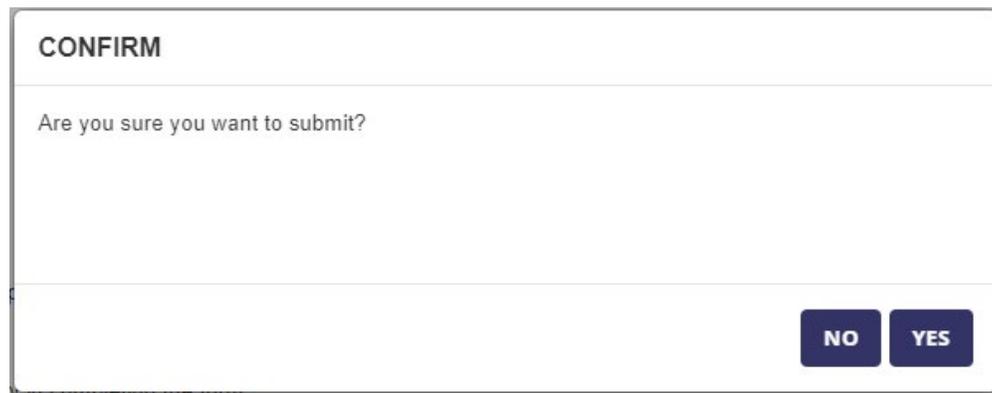
- Scroll up until you see the Tool Bar appear on the top of the evaluation. Review your form for completeness and utilize the spell/legal check tool.
- Click “Submit.” Once submitted, the completed evaluation is electronically submitted to your employee for their review, comments, and signature.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

- *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 box will pop up asking if you are sure you want to submit. Click “Yes”, and you will receive a confirmation of submittal.



### Performance Recognition Plan (PRP) Evaluations

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

- PRP evaluations are to be completed based on the anniversary of an employee’s job entry date. The evaluation will populate in the system 30 days prior to when it is due.
- 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 to your Human Resources Business Partner 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 Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

### Completing a Performance Improvement Plan (PIP)

#### Step One (Manager) - PIP Development

- The PIP process begins before you hit submit on the employee’s evaluation that has an overall rating of “Unsuccessful/Needs Development.”

#### Overall Ratings

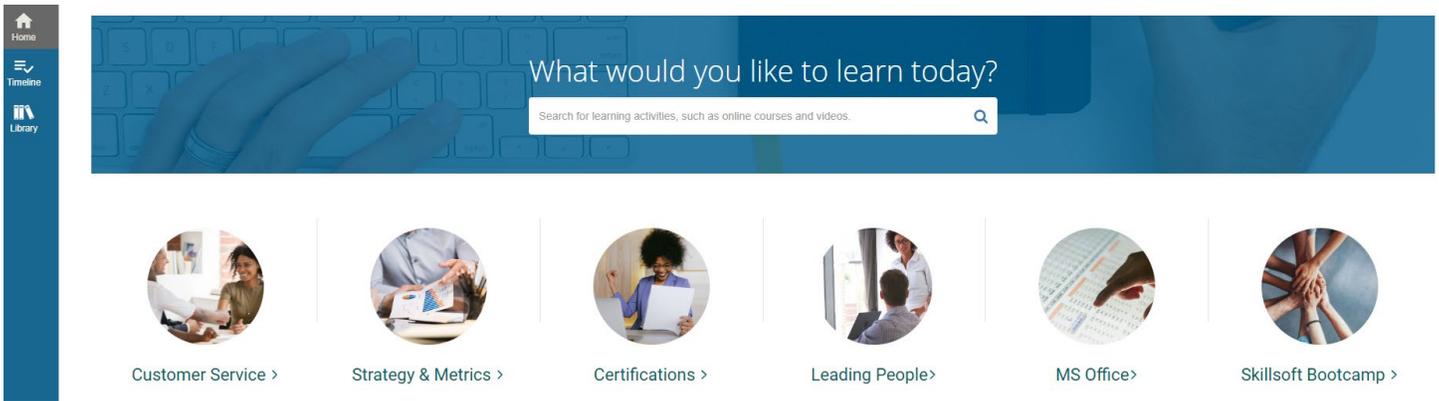
If the employee is being rated unsuccessful/needs development contact the Employee Relations Department before submitting this evaluation.

Manager Year-End Rating \*

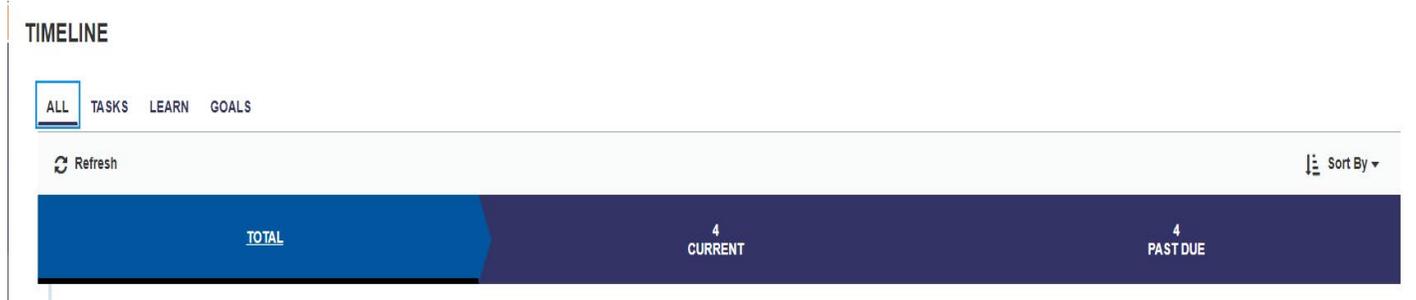
#### ▼ SIGNATURES

- Before you submit this evaluation, please reach out to your Chain of Command as well as Human Resources Employee Relations (ER) team.
- **Important note:**
  - Should you reach out to ER and are advised that the unsuccessful rating is incorrect and needs to be changed, you as the manager would change it in the system and then submit the evaluation to the employee.
  - Once the manager submits the form it goes directly to the employee. If for some reason you make an error on the evaluation and need to change it after it has been submitted, contact [PerformanceMgmt@rivco.org](mailto:PerformanceMgmt@rivco.org) to make the change.
- Once you have spoken with Employees Relations and they have confirmed that the evaluation should be rated as “Unsuccessful/Needs Development,” submit the evaluation in the system. This will kick off the PIP process.
- In 10 days, you will be able to access the first step in the process “Set PIP Development Tasks and Meeting Cadence for: *Employee’s name*”. You will access it like you would a regular evaluation.
- To access the PIP in SumTotal Performance,
  - Sign into the system here: <https://corlearning.sumtotal.host/>
  - Once logged in, you will see your profile page.
  - On the left corner, click on the “Timeline” Icon to access any tasks ready to be completed.

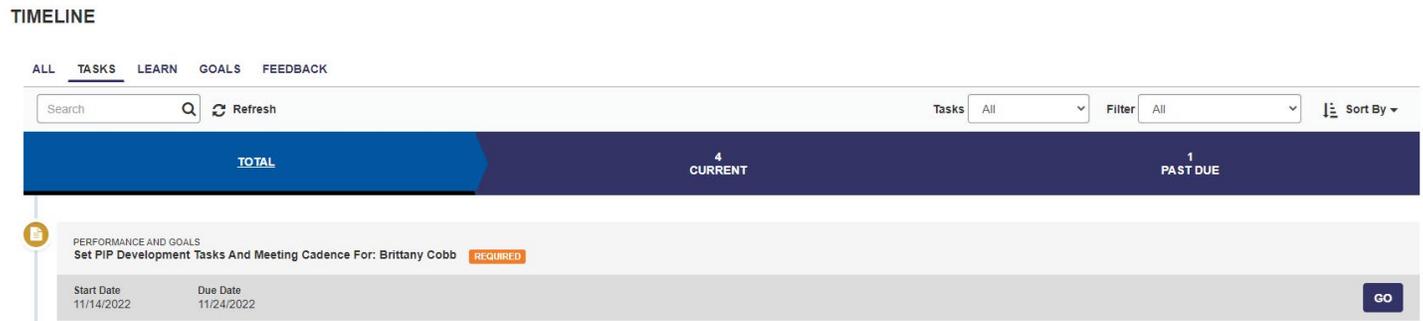
## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd



- Once clicked, you will be taken to your Timeline. To quickly access all Tasks, click on the Tasks link on top of page



- Here you will see all Tasks that need to be completed. Click “Go” next to the task you will be working on.



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

### OVERVIEW

**Manager:** It is essential that the PIP take into account the employee’s specific job requirements, performance deficiencies and training needs, as well as the department’s specific expectations. ADD AND REVISE as much information in the Development Plan section as needed. You may focus on the areas that were rated as Unsuccessful/Needs Development.

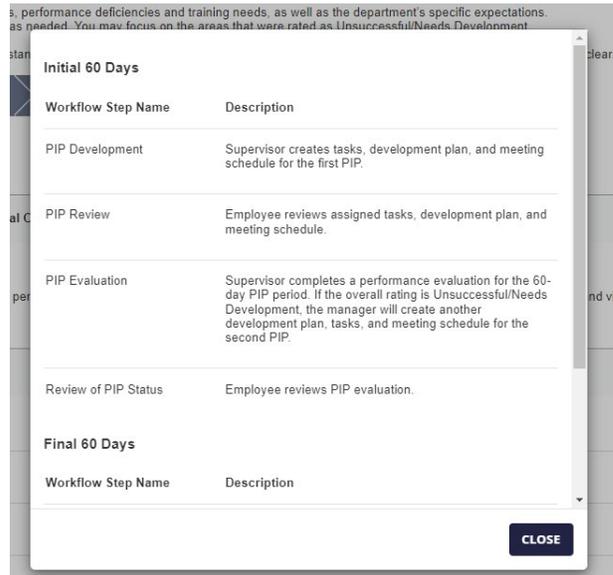
**Employee:** Thoroughly review the Competencies and Development plan to ensure your understanding of the expectations. It is your responsibility to ask for clarification if any of the information is not clear.

- Under the Overview, you will see the steps of the PIP process that will take place between you and your employee.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd



- Click the gray circle that has an “i” in it to see a detailed overview of all the steps in the process.



- As you move down the screen, you will see the PIP Development instructions for this stage in the process.

### PIP Development

Supervisor creates tasks, development plan, and meeting schedule for the first PIP.

- Like the regular evaluation there is also a toolbar. This one will look a little different for this process:



- Let's quickly review these tools:

 **Save** Use the save icon to save your progress.

 **Submit** Once you have completed all of the steps you will click submit.

 **Print Preview Form** Is where you can see a preview of the evaluation. When you click on it, it has a few different preview options you can choose from. Once you pick the view you want you are able to Print, export to PDF or return back to the evaluation.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

**PRINT PREVIEW OPTIONS** ✕

---

<input checked="" type="checkbox"/> Overview	<input checked="" type="checkbox"/> General Information
<input checked="" type="checkbox"/> Workflow Graphics	<input checked="" type="checkbox"/> Competencies
<input checked="" type="checkbox"/> My Development Plan	<input checked="" type="checkbox"/> Attachment(s)

---

Select All
Deselect All
Cancel
Preview



**Notes**

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 Tutorial in SumTotal (coming soon).



**Go To**

can easily navigate to any of the various components of the evaluation. Such as Competencies, year-end summary or attachments.



**Spell/Legal Check**

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

- Below the Toolbar will be the competencies that the employee was rated on based on their classification. You can expand each one to see more information, including definition and behavioral descriptions for each. It should be noted that in this step you are not allowed to edit or add notes to the competencies.
- The main focus of this step is to work on your employee's development plan. This is what your employee will be working on the next 60 days.
- There are directions for both managers and employees for this section:
  - **Managers:** Be specific on what action(s) you want the employee to take going forward. The employee should be able to clearly read what steps they need to take to improve their performance over the next 60 days. The Development Plan should be customized to reflect the competencies from the performance evaluation that were rated Unsuccessful/Needs Development.
  - **Employee:** Thoroughly review the Competencies and Development plan to ensure your understanding of the expectations. It is your responsibility to ask for clarification if any of the information is not clear to you.
- You are able to expand the different development plans that have been created.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

**▼ MY DEVELOPMENT PLAN**

**Manager:** Be specific on what action(s) you want the employee to take going forward. The employee should be able to clearly read what steps they need to take to improve their performance over the next 60 days. The Development Plan should be customized to reflect the competencies from the performance evaluation that were rated Unsuccessful/Needs Development.

**Employee:** Thoroughly review the Competencies and Development plan to ensure your understanding of the expectations. It is your responsibility to ask for clarification if any of the information is not clear to you.

✕ Expand All   ✎ Edit

---

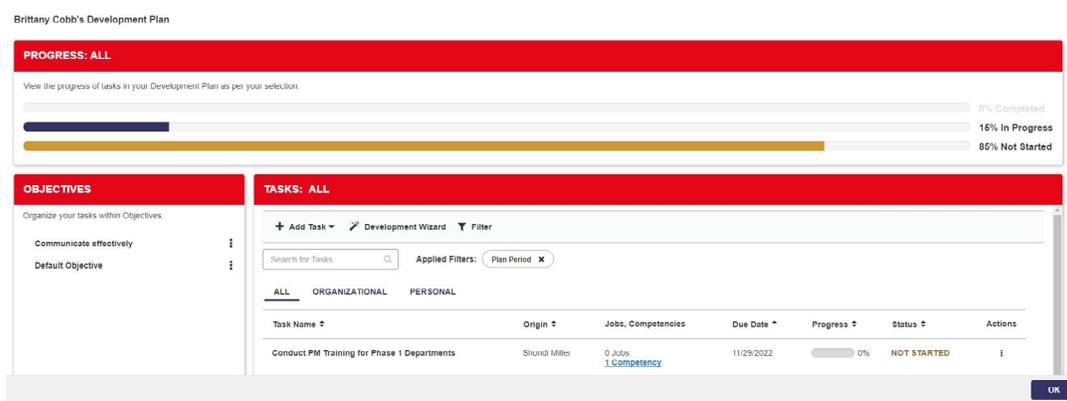
› Default Objective 4%

---

› Communicate effectively 0%

**Development Plan Comments**

- Click edit to access all tasks, edit any existing tasks, and add new tasks based on what the employee will need to work on for the next 60 days. Once you are complete, click “OK” to exit.



- The last step in this process is adding attachments that Employee Relations has guided you in creating.

**▼ ATTACHMENT(S)**

Upload any policies and/or documentation that are referenced in the tasks and development plan.

Filename Actions

---

No file chosen

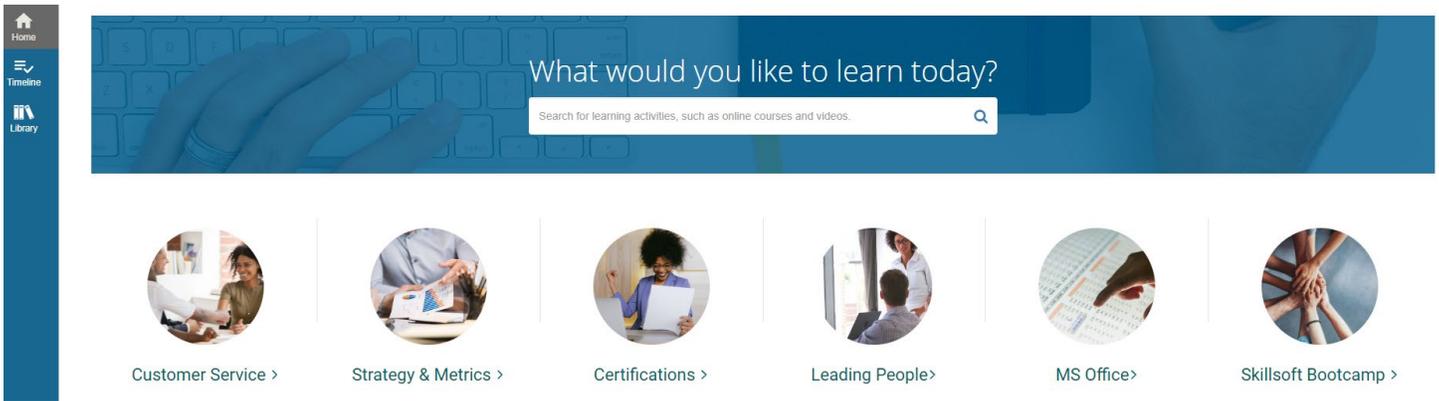
- Once the Development Plan and attachments are complete, scroll to the top and hit “Submit.” It will be sent to your employee to review. Please note that a conversation should have been had with employee before this step is submitted for their review.

### Step Two (Employee) - PIP Review

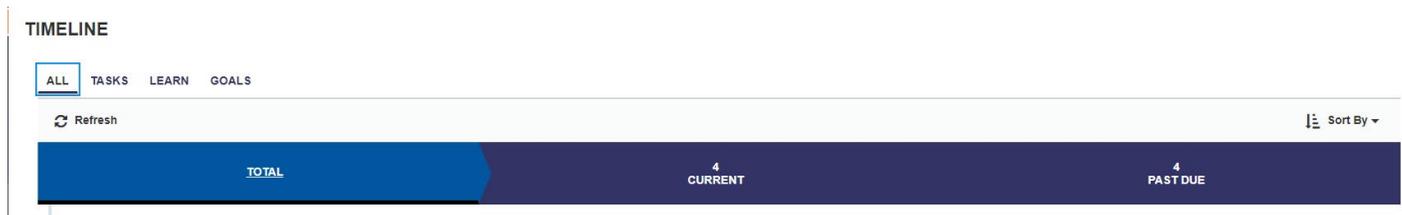
In this step, the employee will receive a notification that there is a Task ready for them in their Timeline. The employee will access the PIP that their Manager/Supervisor created to review what they will need to work on for the next 60 days.

- To access the PIP in SumTotal Performance, sign into the system here: <https://corlearning.sumtotal.host/>
- Once logged in, you will see your profile page.
- On the left side of the screen, click on the “Timeline” icon to access any tasks ready to be completed.

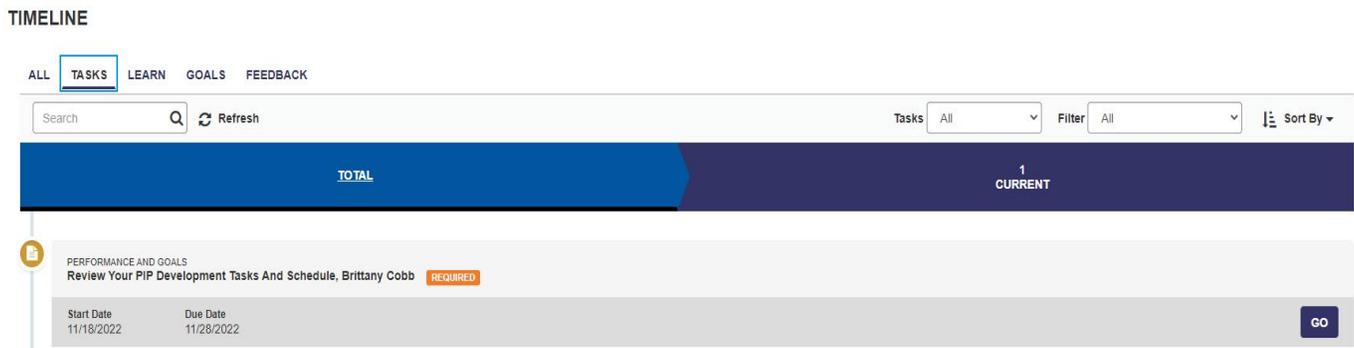
## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd



- 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.

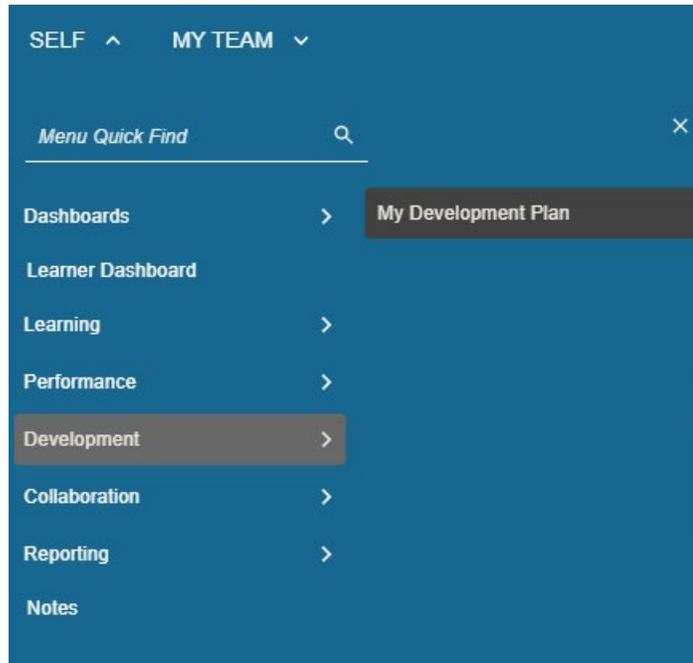


- You will see all Tasks that need to be completed. Click “Go” next to the task you will be working on.



- For an explanation of the overview section, PIP process timeline information, and an explanation of the toolbar, please refer to step one in the PIP Process.
- Review the competencies. You can expand each one to see more information, including definition and behavioral descriptions for each.
- Below competencies, review the “My Development Plan.” Expand all to see all tasks assigned to you for the next 60 days.
- You are also able to access your Development Plan at any time by clicking on Self -> Development -> My Development Plan.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd



- After the My Development Plan section, you will be able to see any attachments that have been uploaded for you to review.

▼ ATTACHMENT(S)

Upload any policies and/or documentation that are referenced in the tasks and development plan.

Filename

Actions

Choose File No file chosen

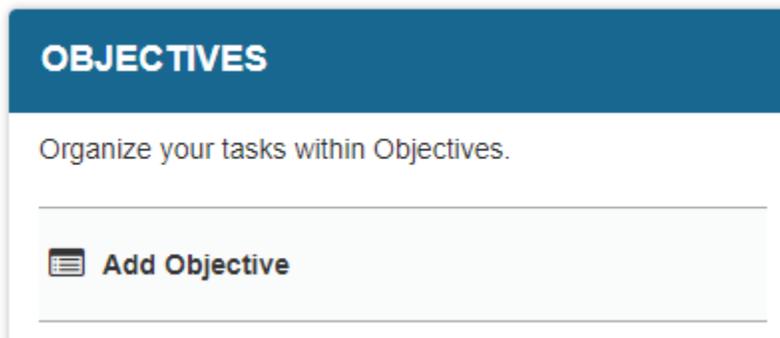
ADD

- Once you have reviewed all the above sections, scroll up and click “Submit.” This completes this portion of the process.

**Quick Tip: Keep your PIP Tasks organized!**

Keep your PIP tasks organized in the “My Development Plan” tab!

- Open up the Development Plan and create an Objective.
- Click on “Add Objective.”



- Fill in the “Objective Name.”

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

- Add a description, start date, and end date. These can coincide with the start and end of the 60-day PIP process.
- Click “Save.”

### NEW OBJECTIVE

Objective Name \*

Start Date  End Date

(MM/DD/YYYY) (MM/DD/YYYY)

Description

- You are now able to align your tasks with your newly created objective.
- Go to your assigned task, click the three dots under actions, and click “Edit.”

ALL	COMPANY	PERSONAL					
<input type="checkbox"/>	Task Name	Origin	Jobs, Competencies	Due Date	Progress	Status	Actions
<input type="checkbox"/>	151 Quick Ideas to Improve Your People Skills	Development Plan	0 Jobs 0 Competencies		<div style="width: 0%; height: 10px; background-color: #ccc;"></div> 0%	NOT STARTED	⋮
							View Edit Delete Start View Details

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

### Objective

Default Objective ▼

---

Default Objective

PIP Process

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

#### OBJECTIVES

Organize your tasks within Objectives.

Add Objective

---

Default Objective ⋮

PIP Process ⋮

#### TASKS: PIP PROCESS

Add Task Development Wizard Move to Objective Filter

Search for Tasks  Applied Filters: Plan Period PIP Process

---

ALL COMPANY PERSONAL

<input type="checkbox"/>	Task Name	Origin	Jobs, Competencies	Due Date	Progress	Status	Actions
<input type="checkbox"/>	151 Quick Ideas to Improve Your People Skills	Development Plan	0 Jobs 0 Competencies		<div style="width: 0%; height: 10px; background-color: #ccc;"></div> 0%	NOT STARTED	⋮

### Step Three (Manager) – 60-Day PIP Evaluation

Step three of the PIP process consists of the manager/supervisor completing a 60-day PIP evaluation. You will receive a notification 15 days before it is due. Access SumTotal Performance and complete the PIP Evaluation for your employee.

## Completing Employee Performance Evaluations (Including the Performance Improvement Plan, or PIP, Process) , cont'd

*Note:* This is the same process that you would follow to complete a regular evaluation. Please refer to the section of this guidebook on how complete a regular employee evaluation (page 24).

- For the 60-day PIP Evaluation: If you rate your employee as a “Successful” or above in their final rating, you have reached the end of the PIP Process. Once your employee Reviews and Acknowledges the evaluation, the process will close out.
  - If you rate the employee as “Unsuccessful/ Needs Development,” reach out to your Employee Relations representative. You will then create another development plan, tasks, and meeting schedule for the second PIP.
- Step five will launch 60 days after the 60-day PIP evaluation. The manager/supervisor will complete a final evaluation on the employee.

### **Step Four (Employee) - Review of PIP Status.**

During step four of the PIP process, the employee:

- Accesses their tasks
- Open the 60-day PIP review. Review and acknowledge the evaluation.
  - *Note:* If the rating is “Successful” or above in the final rating, you have reached the end of the PIP Process. Once the employee has “Reviewed and Acknowledged” the evaluation, the process will close out.
    - If the rating is an “Unsuccessful/ Needs Development,” an additional development plan, tasks and meeting schedule will be created.

### **Step Five (Manager) - Final PIP Review**

Step five of the PIP process consists of the Manager/Supervisor completing a Final PIP evaluation. The manager/supervisor receives a notification 15 days before it is due. When this notification is received, access the system and complete your final evaluation for the employee.

- If the rating is an “Unsuccessful/Needs Development,” please reach out to your Employee Relations representative for further steps.
- If the rating is “Successful” or higher, the PIP Process is complete and will be closed out after Employee Reviews and Acknowledges the review.

### **Step Six (Employee) - PIP Closure**

During step six of the PIP process, the employee:

- Accesses their Timeline
- Go to “Tasks”
- Open the final PIP evaluation.
- Review and acknowledge the evaluation. This closes out the process in the system.

## 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

[Home](#) / Notes

#### NOTEBOOK

 New

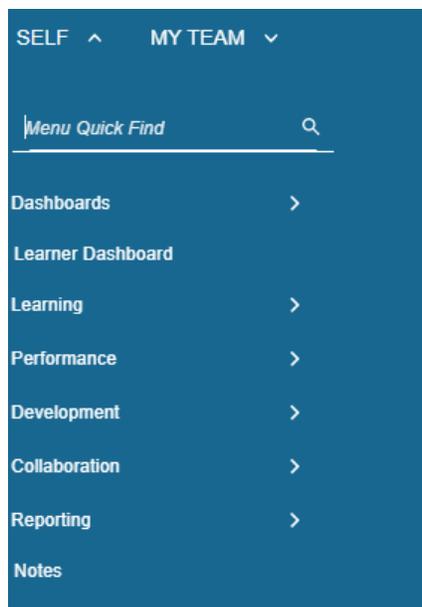
Entry Date	Employee	Subject	Action
10/11/2022	Samuel Rosales	Test Note 1	<a href="#">VIEW</a> ▾
10/11/2022	Cheyenne Price	Test Note	<a href="#">VIEW</a> ▾

### Notes Tips, Tools, and Tricks

- When completing a performance evaluation, you can add in 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. 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”



- Click “New”

## Notes Functionality, cont'd

Home / Notes

### NOTE

Spell Check

Date of Entry \*

Name

Subject \*

Notes

- Enter in the date of your note entry, if different than today's date.
- To enter in the name of the employee this note is for, click the "Search" button and search for your employee (using the magnifying glass) in the pop-up window.

SELECT EMPLOYEE TO VIEW ✕

?

Last Name	First Name	Employee	Email
Rosales	Sam	SaRosales...	Sample@RIVCO.ORG
Rosales	Samuel	000000	donotreply@sumtotalsyst...

Page  of 1
 


Records 1 - 2 of 2

- Select the employee in the search results.
- Return to the note window. Enter in the subject of your note in the "Subject" field, and the content of your note 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 on the right-hand side of the screen.

## 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](mailto: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: 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 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 4-8 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 are in the process of developing a training that will discuss what competencies are, how to utilize them, and how to discuss them with staff. You will be notified when this training is made available to County supervisors and managers. In the meantime, access our KFLA Competency library: [Click Here](#)

### **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 10 in this guidebook for more information on the new evaluation rating scale.

## Frequently Asked Questions, cont'd

**Q: Why are we moving to a new performance management system?**

A: The County of Riverside has developed a new performance management framework. Part of this new framework includes a new performance management cycle and process, competency model, and the implementation of a new performance management system. The new performance management system, SumTotal Performance, is one tool utilized in the new framework that is intended to assist the County of Riverside in becoming a high-performing public service organization.

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

A: If you are having difficulty 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 SumTotal 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: Are there any trainings I can take on how to utilize SumTotal Performance?**

A: Yes! We have a number of tutorials on the system coming soon.

**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 14 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.

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## 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](#)

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## Appendix/Resources

[Board of Supervisors Board Policy C-21](#)  
[Countywide Competency Model](#)  
[E-mail the 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*

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ATTN: LEARNING & ORGANIZATIONAL DEVELOPMENT

 4080 LEMON STREET, 7TH FLOOR RIVERSIDE, CA 92501

 (951) 955-3256