

A hand is shown from the bottom, holding a glowing, translucent globe. The globe is covered in a complex network of blue lines and dots, representing a global network or data flow. The background is dark with some blurred lights and a vertical light streak on the right side.

# PERFORMANCE MANAGEMENT

**Phase 2 Departments – Information Session**

# Table of Contents

---

Our Road to a New Performance Management System

---

Upcoming Changes to Performance Management

---

Trainings and Tutorials

---

Performance Evaluation Demo

---

Next Steps

---

Q&A

sumtotal

Solutions

Customers

Partnerships

Resources

Company

REQUEST DEMO

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Your partner in delivering the most  
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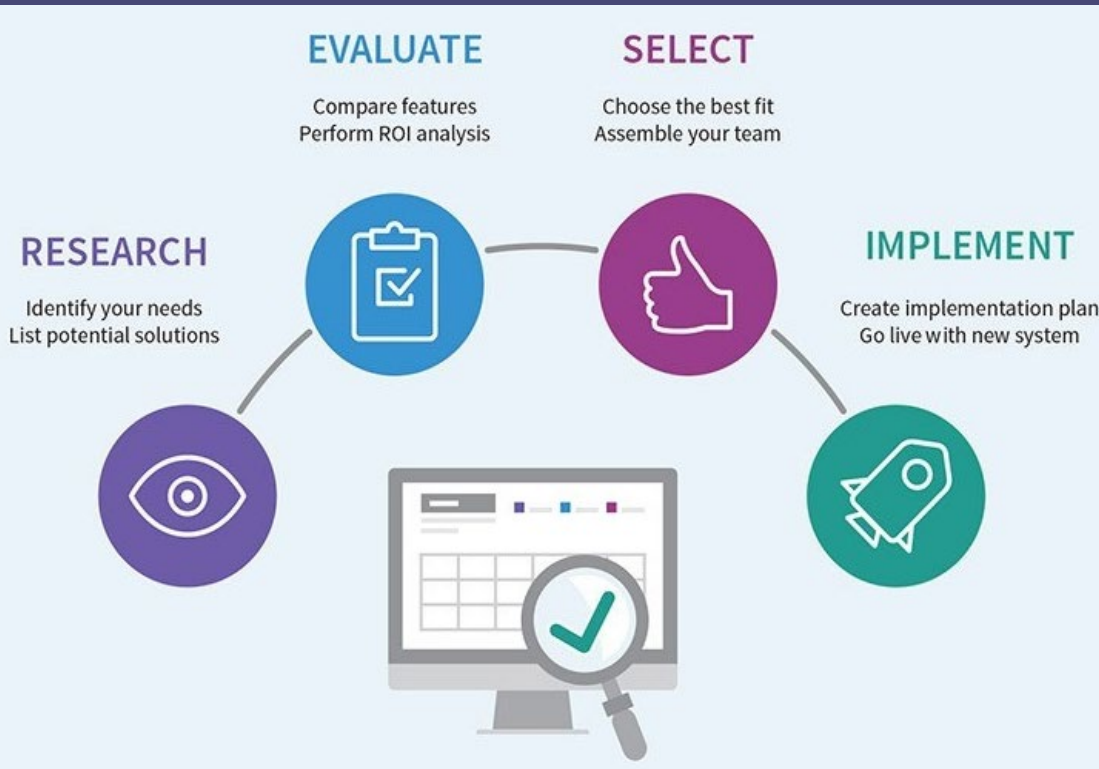
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# Our Road to a New Performance Management System

# The New Performance Management System

*How did we get here?*



## RESEARCH

- HR conducted a countywide survey and held live meetings to gather feedback on departments' wants and needs from a performance management system and the evaluation form itself.
- Gathered feedback from departments on our current EPM system.
- Obtained information on evaluation methods used by departments, including content and delivery method.
- We analyzed our performance management practices across the County.

# What Did Our Analysis Tell Us?



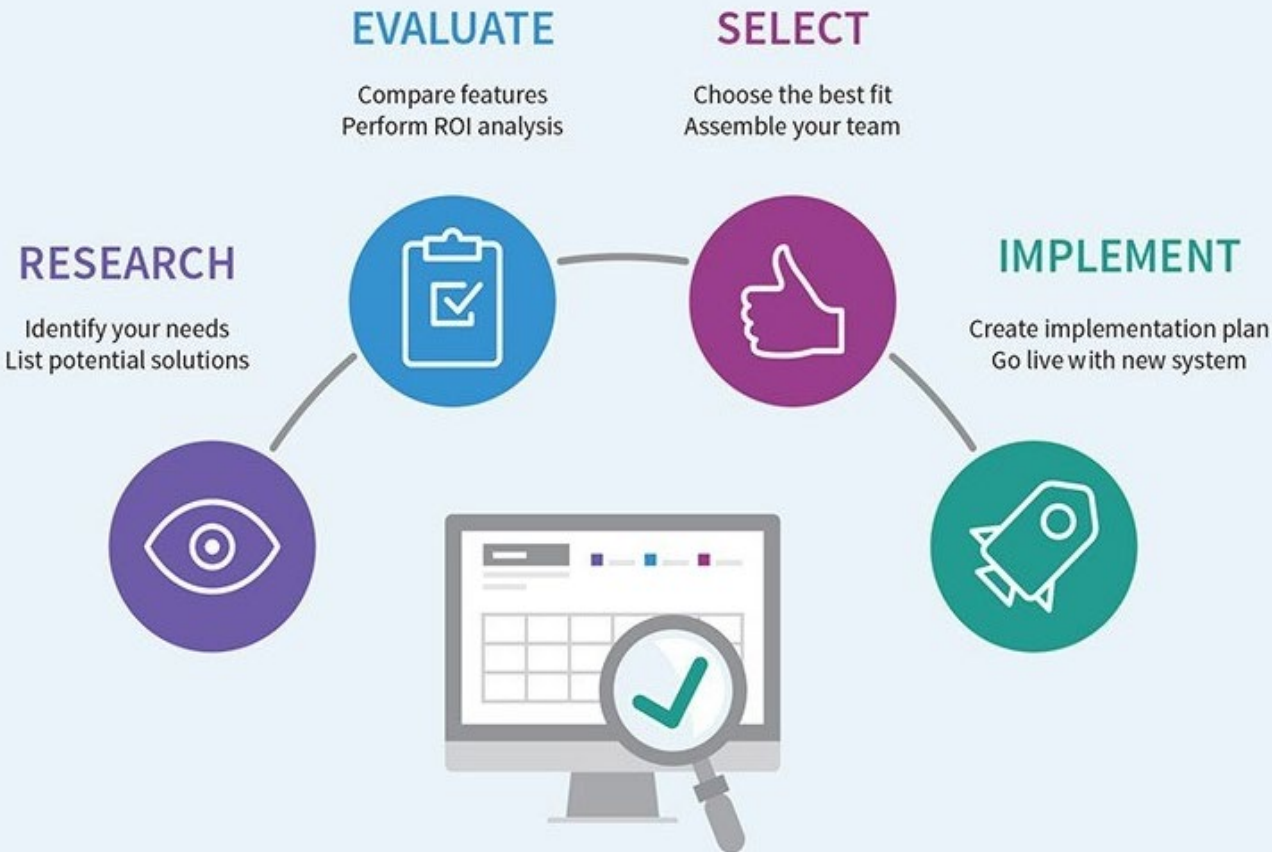
***We needed a full performance management overhaul...*** not just a new evaluation form or system to complete evaluations electronically.

We needed a complete systemic and cultural shift in how we...

- think about performance management,
- align and integrate talent strategies throughout stages of the employee life cycle,
- educate managers on the annual process and provide the support and resources they need,
- ensure accountability around both manager and employee roles in performance management and development,
- assist employees in their performance improvement and professional development,
- view and manage strategic workforce and succession planning, and
- create clarity around the overall purpose of performance management.

# The New Performance Management System

*How did we get here?*



## EVALUATE System Demos

- From the research, we created an RFQual and scheduled demos with the top vendors that met all, or the majority, of RivCo needs and wants. All departments were invited to attend the demos or view the demo recordings. Over 100 department representatives attended each of the demos.

## SELECT System Selection

- A selection committee, comprised of representatives from a variety of County departments, including DPSS, RUHS, IT and others, viewed and scored the demos based off a matrix/rubric. The selection committee's final selection was SumTotal Performance.

## IMPLEMENT System Implementation Project

- Currently in the implementation phase of the project.



# Upcoming Changes to Performance Management

In addition to a new Performance Management System, there are a number of changes being implemented to support the County's new Performance Management Framework

- New Countywide Competency Model
- New 3-Point Rating Scale
- **Pending** Changes to Board Policy C-21 Employee Performance Evaluation Reports
- Performance Evaluation Processes and Recommended Practices
- Performance Evaluation Component Requirements



Shift  
Happens

# New Countywide Competency Model



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.

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*

# Why is the County Implementing a Countywide Competency Model?

- *Recruitment and Selection*
- *Onboarding*
- *Professional Development*
- *Career Planning*
- *Coaching and Mentoring*
- *Annual Evaluations*
- *Strategic Workforce and Succession Planning*

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

**NEW**

# Countywide Competency Model

*Competencies included in the new model come from the Korn Ferry Leadership Architect competency library which includes 38 competencies.*

# New Evaluation 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.



## Performance Policy and Practice Changes

**Pending** minor Board Policy C-21 changes will eliminate some of the frustrations managers expressed in relation to workflow and compliance.

### Two-step evaluation process

- Manager assigned annual evaluation 30 days prior to employee anniversary date (job entry date) then employee reviews and electronically signs

### PIP included in new Performance Management System

- Overall “Unsuccessful/Needs Development” rating will trigger the PIP in the system and manage the PIP process through workflows

### New recommended practices align to new performance system and support the annual performance management cycle

- set goals at the beginning of the reporting year
- regular 1:1 meetings
- manager notes and kudos storage in new system for easy evaluation comments
- coaching and development throughout the year
- utilization of the system’s internal library of courses, videos, books, and other learning and development resources
- continuous feedback



# New Performance Evaluation Components

**Performance  
Goals**

*(optional & not rated)*

**Competencies**

*(required, pre-determined by  
job level and auto-populated)*

**Development  
Plan/Activities**

*(optional & not rated)*

**Overall  
Rating**

*(required)*



## **Trainings and Tutorials**

# Trainings & Tutorials

All Phase 2 department training will be held throughout the months of March and April

A new Performance Management course will be conducted with all managers/leadership and will include the following content:

- Performance Management and the Annual Cycle
- Writing Effective Evaluations
- Competencies and the Competency Model
- How to Navigate the New Performance Management System
- How to Complete an Evaluation in the New System
- How to Complete a PIP in the New System
- Resources and Tools Available in the New System

24/7 access to online video tutorials

Live system tutorials for employees during the month of April





# Performance Evaluation Demo



PLAN

A

D

E

H

B

F

G

**Next Steps**

C

- Visit the Performance Management Implementation project website at [www.RC-HR.com/pm](http://www.RC-HR.com/pm)
- Training will be throughout the months of March and April
  - Manager/Supervisor Training (March): Dates and registration link sent to Department Administrators last week
  - All-Department Training (April): Registration link will be sent in coming weeks
- Department Administrators:
  - Assist in getting your Departmental Supervisors and Managers registered for training in March
  - Assist with distributing information and communications throughout implementation
  - Assist with any decision points/departmental information that may be needed for set-up throughout implementation

**Go Live is April 3<sup>rd</sup>**





## **Questions and Answers**



# Thank you!

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For questions relating to the Performance Management System, project updates, Performance Management training, or other Performance Management topics and resources, please visit the Performance Management implementation project website at [www.RC-HR.com/pm](http://www.RC-HR.com/pm).

You may also email HR's L&OD Performance Management Team at [PerformanceMgmt@rivco.org](mailto:PerformanceMgmt@rivco.org)