

	<h1 style="color: blue;">City of Helena</h1> <h2 style="color: blue;">Personnel Policy</h2>	Policy number	7-1
		Original Adoption	02-09-1987
		Revision #	8
		Last revision date	October 2015
Section Title	Employee Development		
Subject	Performance Evaluations		

Performance evaluations will be conducted on every full-time and part-time employee in a regular position. The purpose of the evaluation is to maintain and encourage improved performance and to recognize outstanding performance.

Temporary employees should also receive performance evaluations at the end of their employment. This may be done in the comments section of their final status sheet or an attached evaluation form. The purpose of this evaluation is to determine eligibility for rehire.

Performance Evaluation Rating Criteria

Performance evaluations should be based on job descriptions and specific established goals and timetables. Rating criteria are included in all performance evaluation templates. The number and specific criteria in an evaluation vary by the type of job.

Supervisors should review items that employees will be evaluated on with new employees when they begin working for the City as part of the onboarding process.

Evaluation Process

A. Evaluation Period:

The City of Helena's performance evaluation period is from the date of hire through each succeeding anniversary date. The evaluation period will change based on an employee's promotion, transfer or demotion into a new position.

Supervisors are encouraged to evaluate employees any time there is an indication of poor performance or when more formal feedback is needed. Employees must receive evaluations at a minimum of every 12 months, but a supervisor may evaluate as frequently as they determine necessary for specific employees.

B. Evaluation Period for Employees:

- a. six months from date of hire, promotion, transfer or demotion and
- b. one year from date of hire, promotion, transfer or demotion and
- c. annually every date thereafter

C. Evaluation Procedures:

- a. Inform the employees of the duties and responsibilities to be assessed along with measurable goals and specific timelines for goal achievement.
- b. Make written comments explaining all ratings.
- c. Provide employees with the opportunity to review ratings and supporting comments, when completed.
- d. Advise employees of the right to submit a written response to be attached to the evaluation form.
- e. Make a copy of the written evaluation and any comments available to the employee.
- f. Send original signed evaluation form along with any employee comments to the Human Resources Office for filing in the employee's personnel file.

Employee/Supervisor Review of Performance

Performance evaluations will not be placed in an employee's file without first being reviewed and discussed with the employee. Evaluations must be signed by both the supervisor and the employee.

If an employee refuses to sign the performance evaluation, a statement to that effect will be made in the space reserved for the employee's signature. The evaluation will be placed in the employee's file with that acknowledgment and without the employee's signature.

Employees may not grieve the content of a performance evaluation or the reviewer's comments. However, employees may make a written response to their performance evaluation. This will be filed in the employee's personnel file attached to their evaluation. If an employee chooses to submit a response, the employee must submit their comments within **10 working days** of the evaluation meeting with their supervisor.

All appropriate signatures should be on the form before being submitted to the Human Resources Office for review.

All ratings must be supported by supervisor's comments.

Supervisors are encouraged to attach statements to the evaluation form if there is not enough space on the form for appropriate comments.

Employees may make rebuttal comments in writing and submit with the evaluation form.

Records

- A. A copy of the performance evaluation and rebuttal comments, if any, shall be retained in the employee's personnel file for a minimum of 3 years after the evaluation and for a minimum of 2 years after the last date it was used in an employment decision. The evaluation may be retained for a longer period at the City's discretion.
- B. Supervisors shall keep evaluation information confidential, except where necessary:
 - in work-related discussion with superiors;
 - in work-related discussion with prospective employers of the employee (must be authorized by the employee), general discussions with prospective employers are allowed. The actual ratings must not be discussed without the employee's written authorization.
 - when disclosure is required in administrative or court proceedings.

Any questions concerning the performance rating process should be addressed to the Human Resources Director.