
Human Resources Department



Memorandum

To: All Non-Civil Service Supervisors/Division Managers/Department Directors

From: Bryan Kendrick, Director of Human Resources

Date: February 15, 2024

Re: 2024 Employee Appraisal Process

Once again, it is time for the City of San Angelo to conduct performance appraisals. As you know, we utilize a holistic 30-day process that includes the following steps:

- Step 1: Employee Self-Appraisal - 7 days
- Step 2: Immediate Supervisory Review – 7 Days (During this period the Supervisor will review the Employee’s submission and will reconcile with the creation of their own appraisal)
- Step 3: If applicable, Next Level Supervisory Review – 7 Days (Director will decide applicability- However during this time every division must submit the overall performance rating for each appraised employee to the Director for approval)
- Step 4: Preliminary HR approval prior to discussion – 3 days
- Step 5: Final Discussion/presentation of Appraisal – 6 days

The employee’s self-appraisal is a very important process that allows a reconciliation between the employee’s and the supervisor’s perspectives related to performance.

Any employee hired between January 1st through March 31st, in any given year, will receive an overall “N/A” rating which will result in a “Meets Expectations” for the Overall Performance Rating (OPR) making them eligible for the possibility of a merit increase on October 1st as determined by City Council during the budget process.

March 2024

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
					1 Distribution of Self-Appraisals	2
3	4	5	6	7	8 Step 1: Suggested due date for Self-Appraisals	9
10	11	12	13	14	15 Step 1: Suggested due date for Immediate Supervisor Review/Completion of Appraisal.	16
17	18	19	20	21	22 Step 3: if applicable, Suggested due date for Next Level Supervisory Review.	23
24	25	26	27 Step 4: Suggested due date for approval from HR.	28	29 Step 5: Suggested due date for Final Discussion/Presentation of Appraisals to Employee.	30
31						

The following are a list of topics that are relevant to all supervisors in their administration of performance appraisals. Please read carefully and feel free to call Human Resources at (325) 657-4221 with any questions. **All completed appraisals are due to Human Resources by 5:00 PM, Monday, April 1, 2024.**

Completing and Communicating the Performance Appraisal Form

All non-civil service employees are appraised using one of three appraisal forms: Non-Supervisory Employees, Supervisory & Professional Employees, or Managerial & Executive Employees. All Civil Service employees are appraised using one of three appraisal forms: Fire Department Supervisory Employees, Fire Department Non-Supervisory Employees, or Police Department Civil Service Employees. A “Job Titles List” is provided on the extranet that indicates which job titles fall into each category. If you notice any errors or omissions on that list, please email bryan.kendrick@cosatx.us. Please complete the appropriate appraisal for each employee. The supervisor should verify all steps in the process are completed prior to discussing the appraisal with the employee.

Fillable PDF versions of the performance appraisals are available on the City’s extranet site, located at <http://www.cosatx.us/departments-services/extranet/department-extranet-pages/human-resources/appraisals>. If you do not have access to the extranet, please contact Human Resources.

Supervisors may choose to complete the form electronically or by hand. However, the appraisal must be communicated to the employee on paper and both the employee and supervisor will initial each page of the document as well as sign the last page of the document. In instances where the employee wants to include comments on the appraisal, they must be given the opportunity to do so. Supervisors will need to consider this allotment of time when completing the submission deadline to HR.

Unless approved otherwise by City Council, employees hired on or after April 1, 2024, will not receive a merit increase on October 1, 2024.

Overall Appraisal & Pay Increases

At the time of the appraisal conversation, the supervisor shall review the entire document with the employee and communicate the employee's overall performance rating as a "Below Expectations", "Improvement Needed", "Meets Expectations", "Exceeds Expectations", or "Outstanding/Leader".

An employee receiving:

- "Meets Expectations" rating consistently demonstrates solid performance and meets expectations related to performance quality, efficiency, and output;
- "Exceeds Expectations" rating consistently demonstrates a higher level of performance; performance quality, efficiency, and output are routinely greater than the defined expectations;
- "Outstanding/Leader" rating consistently demonstrates the highest level of performance; work and behavior serve as an example to others; consistently excels beyond expectations related to performance quality, efficiency, and output; routinely demonstrates an ability to excel in a large variety of assignments.

The overall performance rating (OPR) must be consistent with the overall ratings given at each section throughout the appraisal.

Overall performance ratings (OPR) of "Below Expectations", "Improvements Needed", "Exceeds Expectations", "Outstanding/Leader" must be substantiated by comments. Overall performance ratings (OPR) of "Meets Expectations" do not require comments; nonetheless, they are welcome.

Any merit increases in conjunction with the performance appraisals are determined by the City Council during the budget process.

Overall Performance Ratings (OPR) of "Below Expectations"

Employees receiving an OPR of "Below Expectations" will be placed on a Performance Improvement Plan (PIP). They will be re-appraised after a period of three months (April 1 – June 30). If performance has not improved at that time, and the employee is rated as "Below Expectations" or "Needs Improvement", there is clearly a problem in the area of job performance, attendance, or conduct of sufficient seriousness to require disciplinary action up to and including termination. If their overall performance has improved to a minimum of "Meets Expectations", they will be removed from the PIP. However they will not be eligible to a 10/01/24 pay increase, if granted by City Council.

Overall Performance Ratings (OPR) of “Improvement Needed”

Employees receiving an OPR of “Improvement Needed” will be placed on a Performance Improvement Plan (PIP). They will be re-appraised after a period of three months (April 1 – June 30). If performance has not improved at that time, and the employee is rated as “Below Expectations” or “Needs Improvement”, there is clearly a problem in the area of job performance, attendance, or conduct of sufficient seriousness to require disciplinary action up to and including termination. If their overall performance has improved to a minimum of “Meets Expectations”, they will be removed from the PIP and will be eligible to receive a 10/01/24 pay increase, if granted by City Council.

Employees on Leave at Time of Appraisals

Supervisors who have employees out due to administrative leave and/or non-FMLA medical reasons should complete the appraisal form and give the employee an overall “N/A” rating for the Overall Performance Rating (OPR). When the employee returns to work, complete the appraisal. If you have questions about your employee who is currently out on leave, contact HR for additional information.