
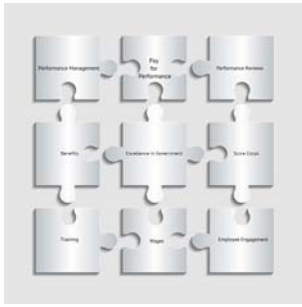



CITY AT THE CENTER
WEST ALLIS

PAY FOR PERFORMANCE OVERVIEW




INTERRELATED INITIATIVES


P4P - TWO PARTS

- 1) Performance Management and Performance Reviews
- 2) Pay for Exceptional Performance and Educational Achievement




GOALS OF THE PERFORMANCE MANAGEMENT AND REVIEW PROCESS

- Communicate expectations, encourage ongoing feedback and coaching, and addressing performance issues in a timely manner.
- Create a sense of personal responsibility and accountability.
- Establish goals and plan for coming year.
- Provide criteria by which performance is rated.
- Define and clarify responsibilities and resources needed.
- Provide a tool to apply performance ratings in an equitable and consistent manner across the organization.
- Establish a baseline for acceptable employee performance.



PERFORMANCE MANAGEMENT


- Regular feedback and interaction between employees and supervisors.
- Discussion and adjustment of focus based on City's changing needs and priorities.
- Performance documentation opportunities for employees and supervisors in NeoGov Perform.



PERFORMANCE MANAGEMENT TOOLS

- Utilization of NeoGov's Perform for electronic processing of evaluations.
- 3 Evaluations Forms: Non-Exempt, Exempt, and Supervisory

Non-Exempt	Exempt	Supervisory
<ul style="list-style-type: none"> • Goals • Job Duties • Organizational Competencies • Training 	<ul style="list-style-type: none"> • Goals • Job Duties • Organizational Competencies • Training 	<ul style="list-style-type: none"> • Goals • Job Duties • Organizational Competencies • Leadership Competencies • Training



ANNUAL PERFORMANCE REVIEW PROCESS

- Goal/Expectation Setting
- Formal Quarterly Check Ins
- Annual Review
 - Self Evaluation
 - 360 feedback may be included (co-workers)
 - Supervisor Evaluation
 - Evaluation is reviewed by next level supervisor or Department Head (depending on department)
 - Supervisor and Employee meet to discuss self eval, 360 feedback and supervisor rating
 - Employee Acknowledgment



PERFORMANCE REVIEW RATINGS (FOR INDIVIDUAL FACTORS)

Performing - This rating is given when an employee is a steady, reliable performer and whose actions/behaviors consistently contribute to the success of the department and the Organization. The majority of employees should be performing to this level.

Developing - This rating is given when an employee is new to his/her role or has expanded duties and is still learning key aspects of the duty or competency.

Not Meeting Expectations - This rating is given when an employee is not performing at the expected levels of standard performance and needs to make improvements; or less than satisfactory performance on a consistent basis; performance improvement plan required.



RATING SCALE – WHY?

- Limits Halo Effect - Limiting to three ratings and having a separate exceptional performance process eliminates the halo effect; the average rating for employees previously was 4.2.
- Consistency – provides more consistency among departments, previously some departments have all employees rated as 5's.



SCORING

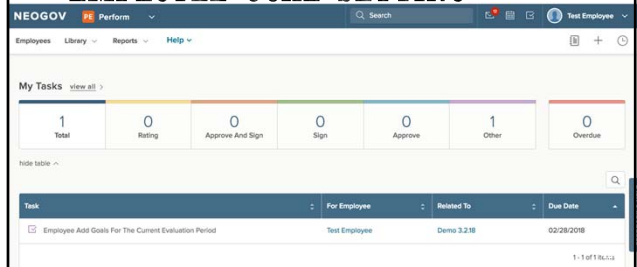
- NeoGov Perform Software used for Rating and contains the following weights by category-
 - 50% Core Competencies ([click here](#))
 - 50% Job Duties
- Scores of 90% and greater receive COLA increases and step increases if in the steps*
- Those less with less than 90% require performance improvement plan (probationary and developing employees handled differently)

2018 - COLA has already been provided as the pay for performance system was still being created, the 2018 Adopted Budget provided for a 1% Cost of Living Adjustment (COLA) for all employees whose positions are listed on the salary schedule and adjustment of the salary schedule by 1%.



NEOGOV'S PERFORM

EMPLOYEE GOAL SETTING




The screenshot shows the NeoGov Perform software interface. At the top, there's a navigation bar with 'NEOGOV Perform' and a search bar. Below that, there are tabs for 'Employees', 'Library', 'Reports', and 'Help'. The main content area is titled 'My Tasks' and shows a progress bar with several task categories: Total (1), Rating (0), Approve And Sign (0), Sign (0), Approve (0), Other (1), and Overview (0). Below the progress bar, there's a table with columns for 'Task', 'For Employee', 'Related To', and 'Due Date'. The first row shows a task 'Employee Add Goals For The Current Evaluation Period' for 'Test Employee' (Demo 3.2.18) with a due date of '02/28/2018'.

EMPLOYEE GOAL SETTING

NEOGOV **PE** Perform Test Employee

Employees Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

Complete Task

GOAL SECTION | TEXT ONLY

Current Employee Goals

Items	Description	Progress	Actions
No items to display			

+ Add Items

My Dashboard


Employee

Org Chart

EMPLOYEE GOAL SETTING

NEOGOV **PE** Perform Test Employee

Employees Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

Complete Task

GOAL SECTION | TEXT ONLY

Current Employee Goals

Items	Description	Progress	Actions
Test Goal 1	Test Goal 1	0%	[Progress Bar] ↵ ×

+ Add Items

My Dashboard


Employee

Org Chart

EMPLOYEE GOAL SETTING

NEOGOV **PE** Perform Task Detail

Employees Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

Cancel **Save**

GOAL SECTION | TEXT ONLY

Current Employee Goals

Items	Description
Test Goal 1	Test Goal 1

+ Add Items

My Dashboard

Employee

Org Chart

Title
Employee Add Goals For The Current Evaluation Period

Related to
Demo 3.2.18

Due Date
02/29/2018


Update status from Current to
Completed

Comments

MANAGER GOAL SETTING

NEOGOV **PE** Perform Test Manager

Employees Performance Evaluations Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

My Tasks view all

1	0	0	0	0	1	0
<small>Total</small>	<small>Rating</small>	<small>Approve And Sign</small>	<small>Sign</small>	<small>Approve</small>	<small>Other</small>	<small>Overdue</small>

hide table


Task	For Employee	Related To	Due Date
Manager Add Goals For The Current Evaluation Period	Test Employee	Demo 3.2.18	03/03/2018

1 - 1 of 1 items

MANAGER GOAL SETTING

NEOGOV **PE** Perform Test Manager

Employees Performance Evaluations Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

Complete Task

GOAL SECTION | TEXT ONLY

Current Employee Goals

Items	Description	Progress	Actions
Test Goal 1	Test Goal 1	0%	[Progress Bar]
Test Goal 2	Test Goal 2	50%	[Progress Bar]

+ Add Items

My Dashboard

Employee


Org Chart

Manager

EXPECTATIONS ACKNOWLEDGEMENT

NEOGOV **PE** Perform Test Employee

Employees Library Reports Help



TEST EMPLOYEE
HR SPECIALIST

Demo 3.2.18
Test Employee

DUE DATE
Sun, Mar 4, 2018

go to evaluation detail page

My Tasks view all

1	0	0	1	0	0	0
<small>Total</small>	<small>Rating</small>	<small>Approve And Sign</small>	<small>Sign</small>	<small>Approve</small>	<small>Other</small>	<small>Overdue</small>

hide table

Task	For Employee	Related To	Due Date
Sign Demo 3.2.18 for Test Employee	Test Employee	Demo 3.2.18	04/07/2018

1 - 1 of 1 items

EXPECTATIONS ACKNOWLEDGEMENT

NEOGOV Perform Test Employee

Employees Library Reports Help

United 5 Treats all team members with dignity and respect.

GOAL SECTION | TEXT ONLY
Current Employee Goals

Name	Description
Test Goal 1	Test Goal 1
Test Goal 2	Test Goal 2

NARRATIVE SECTION | TEXT ONLY
Training

Completed Training and Action Taken

Name	Description
------	-------------

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EXPECTATIONS ACKNOWLEDGEMENT

NEOGOV Perform Test Employee

Employees Library Reports Help

Before Ratings

Test Employee
HR Specialist

EVALUATION NAME
Demo 3.2.18

DATE
Sun, Mar, 04, 2018

Sign

Content

SECTIONS

- Job Specific Competencies
- Organizational

COMPETENCY SECTION | 3-POINT RATING SCALE
Job Specific Competencies

20

QUARTERLY CHECK-INS

NEOGOV Perform Test Manager

Employees Performance Evaluations Library Reports Help

My Tasks view all >

1	1	0	0	0	0	0
Total	Rating	Approve And Sign	Sign	Approve	Other	Overdue

Hide table <

Task	For Employee	Related To	Due Date
Check-in	Test Employee	Demo 3.2.18	05/28/2018

1 - of 1 items

QUARTERLY CHECK-INS

NEOGOV Perform Demo 3.2.18

Employees Performance Evaluations

Evaluation Check-In for Test Employee

My Tasks view all >

1 Total

Hide table <

Task

Check-in

Question 1: What progress on goals has been made since you last met with this employee?

Question 2: Select a question focused on the employee's engagement from the question bank provided in your supervisor toolkit online.

Journal Entries

TUE FEB 27, 2018 08:46 AM | TEST MANAGER | SHARED

We are working on better communication. Test Employee needs to let me know when help is needed.

Add to comment box

Cancel Save

SELF EVALUATION

NEOGOV Perform Test Employee

Employees Library Reports Help

My Tasks view all >

1	1	0	0	0	0	0
Total	Rating	Approve And Sign	Sign	Approve	Other	Overdue

Hide table <

Task	For Employee	Related To	Due Date
Rating For Test Employee's Demo 3.2.18	Test Employee	Demo 3.2.18	12/31/2018

1 - of 1 items

SELF EVALUATION

NEOGOV Perform Test Employee

Employees Library Reports Help

back to evaluation detail page

Submit Evaluation

Test Employee as employee

Demo 3.2.18

SECTIONS

- Job Specific Competencies
- Organizational Competencies
- Current Employee Goals
- Training
- Employee Comments

COMPETENCY SECTION | 3-POINT RATING SCALE
Job Specific Competencies

- Conflict Resolution
- Critical Thinking

SELF EVALUATION

COMPETENCY SECTION
Job Specific Competencies

Done Next >

Conflict Resolution
Embraces positive conflict and treats others with respect and dignity. Facilitates the development of creative solutions to conflict.

RATING SCALE * Rating is required

COMMENTS

Performing
Developing
Not Meeting Expectations

Journal Entries 2 entries

TUE FEB 27, 2018 08:48 AM | TEST EMPLOYEE
I agree I need to ask for help when I am feeling overwhelmed.

TUE FEB 27, 2018 08:46 AM | TEST MANAGER (S) | SHARED
We are working on better communication. Test Employee needs to let me know when help is needed.

SELF EVALUATION

NEOGOV Perform

Employees Library Reports Help

Test Employee

back to evaluation detail page Submit Evaluation

Demo 3.2.18

COMPETENCY SECTION | TEXT ONLY
Employee Comments

Employee comments
I think it has been a productive year.

SUPERVISOR EVALUATION

NEOGOV Perform

Employees Performance Evaluations Library Reports Help

My Tasks view all

2	2	0	0	0	0	0
Total	Rating	Approve And Sign	Sign	Approve	Other	Overdue

Task	For Employee	Related To	Due Date
Check-in	Test Employee	Demo 3.2.18	08/28/2018
Rating For Test Employee's Demo 3.2.18	Test Employee	Demo 3.2.18	01/31/2019

SUPERVISOR EVALUATION

COMPETENCY SECTION
Job Specific Competencies

Done Next >

Conflict Resolution
Embraces positive conflict and treats others with respect and dignity. Facilitates the development of creative solutions to conflict.

RATING SCALE * Rating is required

COMMENTS

Performing
Developing
Not Meeting Expectations

Journal Entries 1 entries

Check-In Entries - Test Manager 3 entries

Reviewer Entries 1 entries

Test Employee Self rate
Comments not available

SUPERVISOR'S APPROVAL

NEOGOV Perform

Employees Performance Evaluations Library Reports Help

After Ratings

Test Employee
HR Specialist

EVALUATION NAME
Demo 3.2.18

FILE DATE
Sun, Mar. 04, 2018

Approve & Sign Rate

Rating Summary

Overall Rating
Not Meeting Expectations

SUPERVISOR'S APPROVAL

NEOGOV Perform

Approve & Sign Cancel Submit

After Ratings

Test Employee
HR Specialist

EVALUATION NAME
Demo 3.2.18

Comments
Write comment here...

Please sign your name below

Test Manager
February 28, 2018

Rating Summary

Overall Rating
Not Meeting Expectations

DIRECTOR'S APPROVAL

DIRECTOR'S APPROVAL

EVALUATION MEETING

EMPLOYEE REVIEW ACKNOWLEDGEMENT

2018 BASELINE FOR PERFORMANCE REVIEWS

- Training on NeoGov Perform
- Training for employees and supervisors on giving and receiving feedback
- Baseline Performance Reviews conducted for all applicable employees by June 3, 2018 (others on their anniversary dates); those in steps may receive step increases

2018 - COLA has already been given to employees, as the pay for performance system was still being created, the 2018 Adopted Budget provided for a 1% Cost of Living Adjustment (COLA) for all employees whose positions are listed on the salary schedule and adjustment of the salary schedule by 1%.

EXCEPTIONAL PERFORMANCE & EDUCATIONAL ACHIEVEMENT REWARDS

GOALS OF THE EXCEPTIONAL PERFORMANCE & EDUCATIONAL ACHIEVEMENT REWARDS SYSTEM

- Efficient and effective service delivery and responsible utilization of available resources.
- High performing, collaborative, and continuously improving culture.
- Recognition and rewards for high performance in an equitable and consistent manner across the organization.
- Well-qualified motivated employees.
- Goals and work plans which align with organizational goals.
- Employee Development.



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EDUCATIONAL ACHIEVEMENT REWARDS

Type of Degree/Certification	Amount
Initial Certification/Licensure	\$400
Associate's Degree	\$900
Bachelor's Degree	\$1000
Master's Degree	\$1500
Doctoral Degree	\$2000

- Completion of an accredited or recognized certification program, or associate's, bachelor's or master's or doctoral degree.
- Must be relevant to the employee's current position, and enhance their ability to complete their duties and responsibilities.
- Employees may only receive one educational achievement award per calendar year.
- Rewards are prospective.
- All educational achievement awards are contingent upon budget funding on an annual basis.
- Recertification's and license renewals are not eligible for the educational achievement award.
- An employee may only receive an educational achievement award once for similar degrees/certifications.
- Degrees/Certifications required for an employee to hold position are not eligible for the achievement award.
- Achievement accomplished outside of work hours.

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SPOT DEPARTMENT AWARDS

- Each department will be granted an opportunity to recognize employees in a small form of recognition throughout the year.
- Form of awards – gift cards of \$25 or less; one day or ½ day of vacation.
- Availability of Awards.
 - Dependent on funding and the number of eligible employees in the Department.
- Eligibility
 - All non-represented employees.



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AWARDS FOR EXCEPTIONAL PERFORMANCE

Who? All non-represented current employees who have completed probation.

What? Award Information on Slide 43.

When? At least once per year.

How? Nomination and Process on Slide 44-46.

Why? Goals listed on Slide 37.



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AWARDS FOR EXCEPTIONAL PERFORMANCE PART I

Exceptional Performance – one time completion of goals, projects, assignments.

- Examples (not meant to be an all-inclusive list)
 - Initiatives which provided quantifiable organizational efficiencies including time savings and cost savings; customer service improvements; and improved service delivery.
 - Streamlining and improving of processes utilizing lean practices.
 - Securing alternative funding (i.e. grants) outside of regular job duty.
 - Develop new processes which reduce waste, maximize resources or eliminate unnecessary actions.
 - Completion of a program or project that has significant impact towards the goals, priorities, mission and vision of the City.
 - Exemplary or courageous handling of a situation related to official duties.



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AWARDS FOR EXCEPTIONAL PERFORMANCE PART II

Exceptional Performer – Continuous exceptional performance.

- Promotes strong support for organization's values, mission and vision and positive culture amongst peers in words and actions.
- Consistently exceeding expectations with goals, objectives, attitude and work performance.
- Performance of extra duties substantially beyond those normally assigned.
- Suggests/devises and implement improved means of accomplishing tasks.
- Fosters a curiosity for innovation.
- Makes a strong effort to acquire greater experience and skills to increase potential for advancement.



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AWARD OPTIONS

- Pay increase – base building percentage or dollar increase added to annual pay (available only to those in the performance zone).
- Bonus – one-time, non-base building payment paid out as a set dollar amount or a percentage of pay (available to all employees regardless of placement in the pay range.)
- Accelerated movement within pay range steps (available to employees between the bottom of the pay range and the control point of the pay range limited to one step in each evaluation period).
- Additional Vacation Time (applicable to all employees regardless of placement in the pay range).
- Combination of any of the above.
- Limits on awards will be determined on an annual basis based on availability and current priorities.



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NOMINATIONS

- A notification will be sent to department heads and affected employees requesting nominations at a minimum annually.
- Employees may be nominated by themselves, a co-worker, or by a supervisor or department head.
- Nominations require approval from the employee's department head.



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NOMINATION REVIEW TEAM

- Comprised of Department Heads
- Each Department Head will present the nominations for the nominees in their respective departments.
- After the presentations and review of the nominations, nominations will reviewed and determined to be warranted or not by the nomination review team.



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AWARD ALLOCATIONS

- Department Heads will make recommendations as to the type and amount of reward they believe is warranted for their respective nominees.
- The Mayor, Common Council President and City Administrator will review the recommendations and allocate the awards.



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NEXT STEPS

February and March 2018

- Presentation of Pay for Performance Draft to the following groups - Administration and Finance Committee, Pay for Performance Focus Group, Clerical Task Force, Police and Fire Commission, Library Board and Employee Sessions

March - April 2018

- Adjustments to Program based on feedback

April 2018

- Adoption of Pay for Performance Program

April - June 2018

- Training on NeoGov Perform
- Training for employees and supervisors on giving and receiving feedback
- Baseline Performance Reviews conducted for all applicable employees by June 3, 2018 (those in steps who are meeting expectations move to the next step)



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QUESTIONS?



CORE COMPETENCIES — ADD IT UP

- **Accountable** - Is responsive to the community's interests and needs; timely; dependable; consistent; answerable; effective in the use of resources; adheres to established policies and procedures as appropriate; able to justify decisions and actions.
- **Driven** - Is goal oriented, creative in problem solving; exhibits initiative; sets and pursues high standards; motivated to succeed.
- **Dedicated** - Demonstrates service to others; is customer focused; displays cultural competency and professionalism.
- **Integrity** - Is sincere, honest, trustworthy, and ethical; models values and embodies competencies.
- **Technical** - Has and grows knowledge and skill in area of expertise; is competent and proficient in the use of available technology; develops cross functional skills.
- **United** - Encourages and exemplifies teamwork, positive attitude, and emotional intelligence; is an effective communicator, tactful and diplomatic; mentors others; regularly gives and receives feedback.
- **Progressive** - Is strategic, innovative, skilled in change management and agile; challenges the status quo; explores and drives continuous improvement opportunities.

Adopted by the **Common Council** on December 12, 2017 after the discussion and input from the following groups:
Service Delivery Action Team, Department and Division Heads, Clerical Staff Group, Internal Commission, Police and Fire Commission, Library Board, Administration and Finance Committee.

