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Policy Title: PERFORMANCE EVALUATIONS AND MERIT COMPENSATION	Policy No.: 10-700
Review Responsibility: Barb Cox, Human Resources Manager	Approved By: James I. Fetzer, General Manager
Adopted By: Clallam Transit System Resolution No. R2:2020, original resolution	Effective Date: 09/13/2024

1. PURPOSE

- A. Clallam Transit System (CTS) is committed to providing an effective evaluation process for discussing, assessing, and reviewing the performance of its employees. The effective and timely review of employee performance supports CTS in its efforts to continue to advance the mission, vision, and values.
- B. The performance evaluation provides supervisors and managers (supervisors) a formal means of communicating job performance to the employees, as well as establishing future goals and expectations.
- C. This policy establishes a consistent standard to award merit pay based on performance and outstanding service.

2. POLICY

- A. This policy applies to the performance evaluation and merit compensation process for **non-represented employees only**.
- B. Performance evaluations influence salaries, promotions, and transfers. It is critical that supervisors be objective in conducting performance reviews and in assigning overall performance ratings. Each supervisor is responsible for the timely and equitable assessment of their employees' performance. Supervisors will use the designated CTS *Employee Performance Evaluation Form* to conduct performance reviews and provide thoughtful feedback to their employees.
- C. Performance evaluations should detail the attainment of performance objectives as well as any areas identified for improvement to be addressed during the next review period. Any performance information presented to the employee should have already been, at a minimum, discussed with the employee prior to its inclusion in the evaluation. The evaluation may also recommend future educational and promotional opportunities for the employee to consider.
- D. Full-time and part-time status, non-represented employees will receive performance evaluations in accordance with this policy. Acting, interim, or temporary positions or appointment statuses are excluded from the provisions of this policy. However, if the employee holds regular status (as defined in the CTS *Compensation Plan for Non-represented Employees* in another non-represented position, performance of excluded appointments may be considered as part of the overall performance review of the employee.

3. PERFORMANCE REVIEW PERIOD

A. Initial Review

The first review period for all full-time and part-time employees is inclusive of the first 180 calendar days following their date of hire.

B. Annual Review

Following the initial review period, the annual review period is for the 12 months following the employee's appointment date to their current position (anniversary date) or conclusion of the past performance review period, whichever is later, and each 12-month period thereafter.

C. Subsequent Appointment Review

If an employee is subsequently appointed to a new non-represented position, the new appointment date will become the employee's new anniversary date. The employee will receive a performance review 180 calendar days following their new anniversary date.

D. Informal Reviews

More frequent informal reviews are encouraged and may occur throughout the performance review period.

4. ADMINISTRATION

A. Draft Evaluation

The supervisor will prepare the draft evaluation using the CTS *Employee Performance Evaluation* Form and then will provide the employee the opportunity to review the draft performance evaluation, preferably before the formal performance review meeting.

B. Self-Evaluation

The employee is encouraged to complete a self-evaluation for consideration in the performance review process, that identifies accomplishments, areas of improvement, goals for the next review period, and any training or resources that may assist them in accomplishing their goals in support of CTS's mission and vision.

C. Position Description

The supervisor is also encouraged to review the most recent position description with the employee that is applicable for the review period and update as needed.

D. Performance Review Meeting

The supervisor will arrange a time and confidential location to discuss the employee's performance and the draft evaluation and self-evaluation with the employee. Both parties recognize that open, honest, and constructive communication is critical to the success of the evaluation process. Neither party will unduly delay the meeting. Following the meeting, the supervisor will finalize the evaluation.

E. Consultation

Supervisors and employees are encouraged to discuss the process and any concerns regarding a performance review with the human resources manager (HRM). The HRM may assist during the performance meeting at the request of either the supervisor or employee. A performance evaluation with an overall rating of less than "3.00 – Meets Standards," must be reviewed by the HRM prior to finalizing the evaluation and presenting it to the employee.

F. Completion

Performance evaluations will be completed as soon as practicable following the conclusion of the review period. The supervisor and the employee will sign the final evaluation that is retained in the employee's personnel file. A signed copy of the evaluation will be provided to the employee.

5. PERFORMANCE STANDARDS RATINGS

The performance standards ratings in the evaluation form are broadly defined as follows and not intended to be inclusive of all rating criteria.

5	Far Exceeds Standards	Truly exemplary performance and demonstration of the highest degree of achievement in the work. Performance and contributions are of such a high level that they produce a significantly positive impact on the performance of others and the overall service to the public.
4	Exceeds Standards	Results achieved are clearly beyond what could be reasonably expected. A proven, highly effective leader who builds trust and instills confidence in the organizational leadership, peers, and employees. Consistently exceeds performance expectations and timelines.
3	Meets Standards	Results achieved are those that can be reasonably expected to fully and adequately achieve assigned responsibilities under minimal supervision. Performs major aspects of the job well. Consistently supports the mission and values. Meets the scope of the job requirements. Can occasionally exceed or fall short of expectations.
2	Needs to Improve to Meet Standards	Consistently not meeting all job requirements. Demonstrates limited ability in work production, personal responsibility, and accountability. Requires frequent guidance and assistance.
1	Unacceptable – Fails to Meet Standards	Significant performance-related problem(s). Consistently fails to meet established performance standards. Does not perform in a manner which consistently supports CTS's mission and values. Requires extensive supervision and guidance.

6. MERIT COMPENSATION

- A.** A performance review does not automatically result in a salary increase. An employee whose pay is at the maximum of the salary range may not be granted an increase that would cause the base salary to exceed the maximum of the range for that position.
- B.** An employee with an overall performance rating of at least "3.00 – *Meets Standards*" will be eligible for a merit compensation increase. The recommended merit compensation increase will be presented to the general manager for consideration using the *CTS Salary Adjustment Form*. All merit increases must be pre-approved by the general manager and are subject to CTS's financial restraints.
- C.** The approved salary will take effect the first day after the conclusion of the performance review period of the completed evaluation.

7. TRAINING

All employees subject to this policy will receive training on the performance evaluation process.

8. REGULATORY AND ADMINISTRATIVE CHANGES

- A.** To facilitate the regular business routine of CTS, the CTS Board authorizes and designates the CTS General Manager to approve and implement subsequent changes to the policy that may be required to comply with federal and state regulatory changes or clarifications. The board will be notified of all policy changes.
- B.** In addition, the board authorizes and designates the general manager to approve and implement subsequent administrative changes to the policy which are deemed appropriate in order to facilitate the regular business routine of CTS, unless these changes are of major significance. The board will be notified of all policy changes.

9. REFERENCES

- A.** CTS Employee Performance Evaluation Form
- B.** CTS Salary Adjustment Form
- C.** Compensation Plan for Non-represented Employees