



**Remote Meeting Instructions for the October 20, 2020, Performance Review Committee meeting:**

In order to comply with all health orders and State guidelines intended to stop the spread of the COVID-19 (Coronavirus), **no physical location, including the City Council Chambers, will be set up for viewing or participating in this meeting. No public input will be accepted in any format, written or otherwise.**

The **only** way to view this meeting is to follow the instructions below to watch the YouTube live stream.

- From your laptop or computer, click the following link or enter it manually into your Web Browser: ([www.youtube.com/CityofGreeley](https://www.youtube.com/CityofGreeley))
- Clicking the link above will take you to the City of Greeley's YouTube Channel.
- Once there, you will be able to view the meeting!

Please contact the City Clerk's Office with any questions you might have at 970-350-9740. Thank you!



**Mayor**  
John Gates

**Councilmembers**

Tommy Butler  
Ward I

Brett Payton  
Ward II

Michael Fitzsimmons  
Ward III

Dale Hall  
Ward IV

Kristin Zasada  
At-Large

Ed Clark  
At-Large

A City Achieving  
Community Excellence

Greeley promotes a healthy, diverse economy and high quality of life responsive to all its residents and neighborhoods, thoughtfully managing its human and natural resources in a manner that creates and sustains a safe, unique, vibrant and rewarding community in which to live, work, and play.

# Performance Review Committee Agenda

**October 20, 2020 at 5:00 PM**

**This meeting will be conducted remotely. (See previous page for instructions on how to view this meeting.)**

1. Call to Order
2. Pledge of Allegiance
3. Roll Call
4. Discussion and direction regarding Annual Review Process for City of Greeley Employees reporting to the City Council
5. Adjournment

# Council Subcommittee Agenda Summary

October 20, 2020

## **Agenda Item Number 1**

### **Title**

Call to Order

# Council Subcommittee Agenda Summary

October 20, 2020

## **Agenda Item Number 2**

### **Title**

Pledge of Allegiance

# Council Subcommittee Agenda Summary

October 20, 2020

## **Agenda Item Number 3**

### Title

Roll Call

### Summary

Mayor Gates

Councilmember Payton

Councilmember Fitzsimmons

# Council Subcommittee Agenda Summary

October 20, 2020

## **Agenda Item Number 4**

Maria Gonzalez Estevez, Human Resources Director, 970-350-9714

### **Title:**

Discussion and direction regarding Annual Review Process for City of Greeley Employees reporting to the City Council

### **Background:**

In accordance with provisions of the Charter for the City of Greeley, the City Council has the authority to appoint three employees: the City Manager (§4.1), City Attorney (§6.1) and Municipal Court Judge(s) (§7.1).

For general employees outside the appointment authority of the City Council, performance reviews are conducted in a timeline that implements any merit and/ or market increases on or before March 1. In an effort to implement any merit and/ or market increases for the three City Council employees in a timeline that mirrors that for general employees, City Council conducts an annual performance review in the January to late February timeframe. The City Council formalized the process for conducting these annual reviews in 2011 and has followed a similar process since that time.

Generally, the performance review process for City Council employees is to:

- Demonstrate due diligence and accountability to citizens;
- Provide an opportunity for an honest dialogue about what is being accomplished, where any gaps may exist, and how to maintain progress;
- Ensure accomplishments, goals and direction are in alignment with City Council's philosophy, goals, and priorities;
- Determine the need for further professional development, education, or training; and
- Support decisions regarding compensation.

The purpose of this agenda item is to (a) provide the City Council with an overview of the annual review process for City Council employees; and (b) receive direction on the City Council employee annual review process for 2020/2021.

Agenda Meeting 3:

After the discussion of the proposals to enhance the performance review process for City Council employees for 2020 (completed in Spring 2021) and 2021 (completed in Spring 2022), the process is summarized below:

**Council Employee Performance Review Cycles – 2020 and 2021**

| <b>Action</b>  | <b>Lead &amp; Notes</b>   | <b>Date Completed By<br/>2020 Performance<br/>Cycle</b>  | <b>Date Completed By<br/>2021 Performance<br/>Cycle</b>  |
|--|---|--|--|
| Pre-evaluation: 360 feedback (City Manager & City Attorney)                            | Human Resources (could be completed by 3 <sup>rd</sup> party)                                     | December 11, 2020  | December 10, 2021  |
| Pre-evaluation: Judicial Review Report (Municipal Judge)                               | City Clerk's Office   | January 29, 2021   | January 28, 2022   |
| Self Evaluations: City Manager, City Attorney, Municipal Judge                         | Each individual Council employee  | December 11, 2020<br>Input into Infinity HR; see attached form that will be loaded into system   | December 10, 2021<br>Input into Oracle   |
| City Council Member Individual Evaluations of Each Council Employee                    | Each Individual Council Member  | January 15, 2021<br>Input into Infinity HR; see attached form that will be loaded into system.<br>*May be later for Municipal Judge based on Judicial Review report timing | January 14, 2022<br>Input into Oracle;<br>May be later for *Municipal Judge based on Judicial Review report timing |
| *City Council Member Individual Evaluations of Each Council Employee (Municipal Judge) | Municipal Judge   | February 12, 2021<br>Input into Infinity HR; see attached form that will be loaded into system.  | February 11, 2022<br>Input into Oracle.  |
| City Council Performance Review Meetings   | HR to schedule Each Council employee will be provided performance narrative in advance of meeting | By February 15<br>*May be later for Municipal Judge based on Judicial Review report timing   | By February 15<br>*Municipal Judge based on Judicial Review report timing  |
| Merit Increases and/ or Market Adjustments   | City Council will decide increase and/or adjustment for each Council employee when appropriate,   | Action following completion of Performance Review Meetings; and increases and/ or adjustments effective March 1  | Action following completion of Performance Review Meetings; and increases and/ or adjustments effective March 1    |

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|  | budgeted and available.<br>HR will provide Salary Survey Information as a guide by end of last performance review meeting  |  |  |
| Performance Concerns                   | When Council concludes employee's performance needs improvement or is unacceptable, Council may direct improvement in certain areas, obtain executive coaching/ counseling or other action as determined by majority of City Council | Required action in areas of improvement to be determined by March 1 with specific dates to assess improvements; Other action at pleasure of Council                    | Required action in areas of improvement to be determined by March 1 with specific dates to assess improvements; Other action at pleasure of Council                    |
| City Council 2040 Vision Related Goals | Currently, the City Council 2040 Vision document – which outlines a vision and priorities – is updated after each City Council election (typically in February).   | City Council employee goals related to the 2040 Vision update can be included in each Council employee review as a supplement depending on date of 2040 Vision update. | City Council employee goals related to the 2040 Vision update can be included in each Council employee review as a supplement depending on date of 2040 Vision update. |

**Decision Options:**

N/A

**Attachments:**

2020 Council Employee Self Evaluation Template  
2020 City Council Employee Performance Review Template  
360 Options with pricing





## CITY OF GREELEY ANNUAL SELF EVALUATION – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020

**Ratings:** Use the following for you self-rating in each of the performance areas and overall performance.

**Rarely Meets Expectations/ Occasionally Meets Expectations/ Regularly Meets Expectations/ Occasionally Exceeds Expectations/ Regularly Exceeds Expectations**

### *Overall Performance Rating and Summary*

*Fiscal Year 2020 Performance Highlights – Note areas of excellence, areas for improvement, and goals (achieved or not achieved and any obstacles that influenced non-achievement).*

*Fiscal Year 2021 Performance Goals – highlight individual goals for the Director’s performance that are of particular importance for the coming year.*

Goals identified here should be specific to those goals regarding the Director’s individual performance. Work plan (Department wide and City Council related) items are to be identified in the Employee Work Plan or Personal Development Plan attached to this review.

**EMPLOYEE NAME & TITLE:**

**DATE:**



## CITY OF GREELEY ANNUAL SELF EVALUATION – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020

**Performance Focus Areas:** Throughout the areas identified below, evaluate your general performance in the specific area and the extent to which you demonstrated (or struggled to demonstrate) the City’s Core Values as noted.

|   |                      |
|---|----------------------|
| <b>Job Knowledge/ Skills</b> ( <i>Applied Wisdom</i> )<br>Operational/ functional/ technical expertise; technological literacy; analytical; vision; professional development; Business Acumen;                          | Rating:<br>Comments: |
| <b>Interpersonal Relations</b> ( <i>Principled Relationships</i> )<br>Composure; Compassion; Savvy (interpersonal and political); Conflict Management;  | Rating:<br>Comments: |
| <b>Customer Service</b> ( <i>Integrity</i> )<br>Effective service delivery; fostering diversity; compliance with and support of policies and programs; communication skills; integrity and trust; ethics and values;    | Rating:<br>Comments: |
| <b>Accountability</b><br>Resource allocation; performance measure/ management; planning/ execution; fiscal responsibility; dependability; Decision Quality; Confronting Direct Reports; Self-Knowledge; Action Oriented | Rating:<br>Comments: |
| <b>Management and Supervision</b> ( <i>Stewardship</i> )<br>Managing and measuring work; organizing; process management; Building Effective Teams; Directing Others;  | Rating:<br>Comments: |
| <b>Leadership</b><br>Command skills; strategic ability; perspective; innovation; managing vision and purpose; Peer Relationships; Motivating Others; Managerial Courage;  | Rating:<br>Comments: |
| <b>Excellence</b><br>Intellectual and action oriented horsepower; Creativity; Drive for Results   | Rating:<br>Comments: |

**EMPLOYEE NAME & TITLE:**

**DATE:**



**CITY OF GREELEY ANNUAL SELF EVALUATION – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020**

**OTHER COMMENTS:**

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|                 | SIGNATURE | DATE |
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| <i>Employee</i> |           |      |

**ATTACHMENTS.**

Employee Work Plan Draft

Personal Development Plan Draft

**EMPLOYEE NAME & TITLE:**

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**DATE:**

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## CITY OF GREELEY ANNUAL PERFORMANCE REVIEW – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020

**RATING:** Use the following to determine the employee's performance in each of the performance areas and overall performance.

**Rarely Meets Expectations/ Occasionally Meets Expectations/ Regularly Meets Expectations/ Occasionally Exceeds Expectations/ Regularly Exceeds Expectations**

### *Overall Performance and Summary*

*Fiscal Year 2020 Performance Highlights – Note areas of excellence, areas for improvement, and goals (achieved or not achieved and any obstacles that influenced non-achievement).*

*Fiscal Year 2021 Performance Goals – highlight individual goals for the Director's performance that are of particular importance for the coming year.*

Goals identified here should be specific to those goals regarding the Director's individual performance. Work plan (Department wide and City Council related) items are to be identified in the Employee Work Plan or Personal Development Plan attached to this review.

**EMPLOYEE NAME & TITLE:**

**DATE:**



## CITY OF GREELEY ANNUAL PERFORMANCE REVIEW – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020

**Performance Focus Areas:** Throughout the areas identified below, evaluate the employee’s general performance in the specific area and the extent to which the employee demonstrated (or struggled to demonstrate) the City’s Core Values as noted.

|   |                      |
|---|----------------------|
| <b>Job Knowledge/ Skills</b> ( <i>Applied Wisdom</i> )<br>Operational/ functional/ technical expertise; technological literacy; analytical; vision; professional development; Business Acumen;                          | Rating:<br>Comments: |
| <b>Interpersonal Relations</b> ( <i>Principled Relationships</i> )<br>Composure; Compassion; Savvy (interpersonal and political); Conflict Management;  | Rating:<br>Comments: |
| <b>Customer Service</b> ( <i>Integrity</i> )<br>Effective service delivery; fostering diversity; compliance with and support of policies and programs; communication skills; integrity and trust; ethics and values;    | Rating:<br>Comments: |
| <b>Accountability</b><br>Resource allocation; performance measure/ management; planning/ execution; fiscal responsibility; dependability; Decision Quality; Confronting Direct Reports; Self-Knowledge; Action Oriented | Rating:<br>Comments: |
| <b>Management and Supervision</b> ( <i>Stewardship</i> )<br>Managing and measuring work; organizing; process management; Building Effective Teams; Directing Others;  | Rating:<br>Comments: |
| <b>Leadership</b><br>Command skills; strategic ability; perspective; innovation; managing vision and purpose; Peer Relationships; Motivating Others; Managerial Courage;  | Rating:<br>Comments: |
| <b>Excellence</b><br>Intellectual and action oriented horsepower; Creativity; Drive for Results   | Rating:<br>Comments: |

**EMPLOYEE NAME & TITLE:**

**DATE:**



**CITY OF GREELEY ANNUAL PERFORMANCE REVIEW – DIRECTOR/ DEPARTMENT HEAD – Fiscal Year 2020**

**OTHER COMMENTS** (Employee from performance meeting or self-evaluation; or Supervisor from performance meeting)

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|                 | SIGNATURE | DATE |
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| <i>Employee</i> |           |      |
| <i>Reviewer</i> |           |      |

**ATTACHMENTS.**

Employee Self Evaluation  
Employee Work Plan  
Personal Development Plan

**EMPLOYEE NAME & TITLE:**

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**DATE:**

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We have secured a sample of 360 assessment quotes to illustrate the options the city have and their approximated cost:

1. We could develop our own 360 form/questionnaire and the distributed it to the decided participants via Survey Monkey

Cost per report                      \$0

2. We can certify a member of the City on 360 design and administration through Korn Ferry and the administer 360 in house.

Cost of certification                      \$3,295 (one time)

3. We can complement the Oracle investment by contracting a customizable performance/360 application:

- a. Multi-Rater from Trakstar's: 360 feedback tool that allows managers to compile others' responses to the employee's performance reviews

\$3,000 per term year

- b. AssesTeam: We can customize our assessment or use theirs

\$125 per year

- c. PerformYard: Anonymous Reviews, Self-Assessments, Upward Reviews, Custom Forms, New-hire Assessments, Exit Interviews, Private Notes, External Reviews, 360 Reviews, 1-on-1s, Recognition, Quarterly Check-ins

\$1,500 per term year for all

- d. HelloTeam: All-in-One Performance Management and Employee Engagement Platform

\$1,210 per year

4. We can secure the services of one of the City approved coaches to perform a 360 (six interviews about leadership style, areas of strengths and area of opportunities)

\$2,000

5. We can secure the services of the Employer's Council services to perform the 360 reviews:

\$600 for 1<sup>st</sup> subject and \$400 for additional ones

6. We can secure the services of a consultant to perform 360 reviews

We are waiting on a quote from one of the consultants the City is currently using

# Council Subcommittee Agenda Summary

October 20, 2020

## **Agenda Item Number 5**

### **Title**

Adjournment