S.O.P. #:   PERSONNEL - 23

SUBJECT: RECORD OF EFFICIENCY

DIVISION: EMERGENCY OPERATIONS

Objective: To establish policies and procedures for the annual efficiency ratings for all career members.

Section 1:   General Notes

A.   Members shall be rated annually based off of the member's hire date.

B.   All members shall be evaluated annually for their efficiency in the performance of their duties. Evaluations shall be completed during the months of the member's work anniversary date.

C.   The Officer completing the evaluation select one (1) entry from the drop down menu provided for each section and category of the evaluation.

D.   If "Needs Improvement" or "Seriously Deficient" is checked, an explanation in the comments section is required. Additionally, a Performance Improvement Plan (Form 65) to improve the performance shall be developed. Deficiencies that require a Performance Improvement Plan shall be accompanied by, at a minimum, a Form 22 Verbal Counseling.

E.   Only unsatisfactory ratings should be discussed with the next level supervisor prior to meeting with the member.

F.   Should a member be either promoted or transferred, the evaluation shall be completed by the new supervisor with the input of the prior officers.

G.   Ratings are to be conducted by the immediate supervisors of all career members.

   1.   The Captain and Lieutenants shall rate the members under their command.

   2.   The Captain shall rate the Lieutenants.

   3.   The Company Commander(s) shall include the EMS District Officer's input for members assigned who function as EMS providers.

   4.   EMS Captains shall rate EMS Lieutenants.

   5.   Captains shall be rated by their Battalion Chief.

   6.   Deputy Chiefs shall be rated by the Assistant Chief.

   7.   Battalion Chiefs shall be rated by their Deputy Chief.

   8.   Career uniform personnel assigned to support services will be evaluated by their immediate supervisor within the current command structure.

H.   The reviewing officer cannot change any evaluation unless the rating officer and member being rated are notified and are a part of the decision-making process.

I.   Completed performance evaluations become a part of the member's personnel file.

J.   Unsatisfactory Performance Evaluation

1.   All unsatisfactory performance evaluations must be justified by the supervisor, within the evaluation, and confirmed by the Battalion Chief. Remedial actions shall be outlined by the supervisor for all areas where unsatisfactory ratings are given.
Any member evaluated as "Needs Improvement" in three (3) or more categories, or "Seriously Deficient" in two (2) or more categories shall not be eligible for promotional opportunities during that six (6) month period and may have pay increments delayed.

2.   Performance evaluations may be appealed by the member. Appeals must be made in writing and submitted through proper channels to the member's Deputy Chief within thirty (30) days.

3.   The member will have six months to improve any "needs improvement" or "seriously deficient" ratings or further discipline may be instituted.

K.   Punctuality/Attendance:

The employee will be expected to meet the following criteria:

1.   Satisfactory – 0 Late or 1 Sick without a sick note

2.   Needs Improvement – 1 Late or 2 Sick without a sick note

3.   Unsatisfactory – 2 Late or more than 2 Sick without a sick note

L.   Completion and Distribution

1.   The evaluation shall be completed in Workday. See Appendix A for the process guide.

NOTE: Performance evaluations are NOT to be discussed or compared by personnel, other than for official business.

Section 2:   Peer and Subordinate Evaluation Feedback (voluntary but encouraged)

A.   Introduction: Any subordinate may provide anonymous feedback regarding the performance of their supervisors or managers. (Example: any Fire/EMS Lieutenant, Fire/EMS Captain; supervisor; or manager, may be evaluated by any subordinate who regularly interacts with them in the work environment. Also, any supervisor or manager may be evaluated by a peer (another supervisor/manager) who regularly interacts with them in the work environment.

B.   Goal: This method of additional feedback is designed to be constructive and provide professional development information in addition to the existing record of efficiency process described in Section 1.

C. Process: The feedback will be given using the feedback form (FORM #64) and submitted via interoffice mail to: Performance Feedback, Public Safety Building, Fire HQ, MS 1102F. The feedback can be provided anytime but should ideally be received by November 30 so the content can be incorporated into the annual record of efficiency process.

D. Note: This process does not relieve employees from any obligation to immediately report infractions of rules and regulations; SOPs; policies; laws; regulations; or other orders of the fire department or Baltimore County. It is Baltimore County's desire to immediately investigate and handle such instances to ensure a productive, efficient, professional and respectful workplace.

E. Members may submit the forms anonymously but are also permitted to provide their name.

Performance Evaluations – Sworn Managers Process

Workday's Performance app allows employees and managers to plan, monitor and review the employee's performance objectives.

Managers can utilize the Performance app to complete the following tasks:

- Initiate and Approve the Review Process
- Give or Receive Anytime Feedback

Manager Initiates Review

1. To begin review, in the Search box, **type Start Performance Review for Empoyee**.

2. In the Employee field, **type employee name or use the dropdown to search for a name.**

Start Performance Review for Employee

Employee	*
Review Template	*	Search
		By Type
		Create
Period Start Date	*
Period End Date	*	MM/DD/YYYY

3. From the Review Template dropdown, **select By Type.**

Employee	*	×
Review Template	*	Search
		By Type
Period Start Date	*	Create
Period End Date	*	MM/DD/YYYY

4. **Select type of review** from dropdown menu.

| Search |
| ← By Type |
Annual	>
Fire Form 63	>
Police Dept - Form 13	>
Police Dept - Form 13C	>
Police Dept - Form 87	>

5. **Select the radio button** for the review type that is shown.

Review Template	*	× Police Department Form 87 ...
Period Start Date	*	MM/DD/YYYY
Period End Date	*	MM/DD/YYYY

Submit   Cancel

6. **Select the** appropriate **Period Start Date and Period End Date** to reflect the review period.

7. **Click Submit.**

Manager Evaluation

1. **Click** either the **Go to Guided Editor or the Go to Summary Editor Button.**

| Go to Guided Editor | Go to Summary Editor |
| A simple step-by-step guide | Edit everything on one page |

2. **Complete all** items throughout the evaluation that have a **red asterisk** (*).
3. **Click Next or scroll down** to continue to each new section.
4. In the Competency section under Manager Evaluation, **click** the **red asterisk** (*) to see the dropdown menu of rating choices. Select a rating.
5. **Click** the **red asterisk** (*) to add a comment.
6. **Click Attach** to upload attachments, if applicable.
7. **Click Next.**
8. **Click** the **red asterisk** (*) to add a comment, if applicable.
9. **Click Submit.**

Employee Development Goals

Goal *
mea

Manager Evaluation

Comment *

Add

Sit-Down Review

1. Once you submit the review, **click on pop-up or Inbox item called Complete To Do named Print Performance Review and Meet with Employee.** You may dismiss this pop-up and the reminder will stay in your Inbox.

Inbox

| Actions | Archive |
| Viewing: All | Sort By: Newest |

Print Performance Review and Meet with Employee:
Manager Evaluation: Short Testing Review:

2. **Type** the **employee's name** in the search bar and enter.
3. **Click** on the **Performance** tab in the employee's profile located on the lefthand side of the screen.
4. **Select Create New PDF** to print form.

Due Date		
01/26/2022	View	Create New PDF
12/23/2021	View	Create New PDF

5. **Click Notify me** if the report does not generate immediately. You will be alerted in your notifications when the document is ready.
6. **Go to** your **notifications** in the upper right hand window.
7. **Select** the **PDF** to open the evaluation.
8. **Click** the **Print** icon and print.
9. Meet with employee.
10. **Enter comments** in your Inbox **To Do reminder.**

11. **Click submit** to mark the item complete.

The evaluation will be routed to the employee for acknowledgement.

Acknowledgement for Completion

Once the employee acknowledges, you will receive the task to acknowledge the review**.**

1. **Click on Inbox item Manager Evaluation: Employee Performance Evaluation.**
2. **Click** * next to status.
3. **Select Acknowledge review.**
4. **Add** any comments.
5. **Click Submit.**

Next Level of Approval

Once the manager submits completed evaluation, the next approver will receive the evaluation in their Inbox.
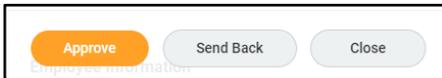
Click Approve for approval. The evaluation will be routed to the appropriate next level.

Or

Click Send Back if changes are needed. You will have an option as to whom to send the evaluation back to.

When all approvals are done, the evaluation will be saved in the employee's Performance module located in their Profile.

View Remaining Process

1. **Click on** the **Inbox icon** from your Quick Access menu.
2. **Click Archive** to find your Performance Evaluation in order to review. The most recent ones will be on top.
3. **Click Process** to view the Process History of the Performance Evaluation.
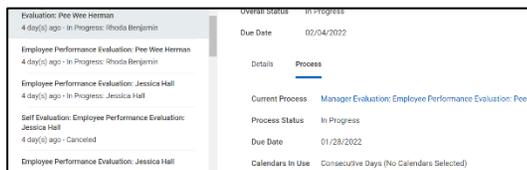
Click Remaining Process to view the remaining process details of the process.

Get Feedback

1. **Type Get Feedback** in the search bar and **select Get Feedback on Worker.**
2. **Enter Employee Name** you want to get feedback on.
3. **Click Ok**.
4. **Type person** you wish to get feedback from.
5. **Select Feedback Sharing** options.
6. **Add specific questions**.
   Click Submit.