

Office of Court Administration
WORK REVIEW POLICY FOR
HEADQUARTERS EMPLOYEES

Approved by:  10/2/2019
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Work Review Policy for Headquarters Employees

Purpose

The Work Review Program is a comprehensive performance management tool designed to:

- Enhance and improve employee performance, job satisfaction, engagement and career development
- Provide a forum for ongoing communication and collaboration between each manager and direct report
- Link employee performance and development to the agency's strategic plan and mission
- Improve retention
- Recognize outstanding performance

The Work Review shall be administered equitably without regard to race, color, religion, age, sex, national origin, or disability.

Work Review Program – Three Components:

The Work Review components are 1) Annual Development Plan meeting, 2) Two optional "Check In" meetings, 3) OCA Kudos email recognition program.

During the Annual Development Plan meeting, it is paramount that employees' performance and career goals are linked to the agency's goals so they understand their part in the agency's mission.

1. Annual Development Plan

Each January, managers and employees will collaborate to identify goals, job assignments and projects as well as performance standards for the upcoming calendar year. Additionally, they will identify and, to the extent possible, address employee's training and career development needs.

Goals can include anything job or career related development, such as:

- Training
- Learning new software
- Obtaining a certification
- Continuing education
- Acquisition of new skills
- Project assignments and deadlines
- Cross-training opportunities

Each employee shall have a current job description. It is the manager's responsibility to create a job description with input and assistance from

Human Resources. A manager and direct report will review his or her current job description at the Annual Development Plan meeting and make changes as needed. If the job description is changed, the manager will send the revised job description to Human Resources. It is the responsibility of Human Resources to ensure all job descriptions are signed, tracked, and included in each employee's file.

2. "Check In"

Managers are strongly encouraged to meet with their direct reports twice during the calendar year to discuss the suggested "Check In" questions. Its purpose is to facilitate an interactive dialogue between managers and direct reports, thereby helping managers determine employees' job satisfaction and engagement.

3. OCA Kudos Email

The OCA Kudos email is a recognition tool designed for OCA staff and customers to provide instant feedback when employees go above and beyond the scope of their job duties. Examples include providing excellent customer service, taking the initiative to suggest and implement improvements, and helping colleagues accomplish projects and tasks. Everyone is welcome to participate across departments and divisions. When a Kudos email is received, Human Resources forwards it to the employee and their manager and files a copy in the employee's personnel file.

Key Staff Responsibilities in Administration of the Work Review Program

Employees

Employees are expected to know the duties and responsibilities of their positions and are expected to participate openly and professionally throughout all phases of the Work Review Program.

Supervisors

Managers and directors are expected to take a leadership role in modeling and fostering an environment of collaborative communication with each direct report. It is the responsibility of each supervisor to initiate and complete the Annual Development Plan form by January 31st each year. "Check In" questions are optional.

Human Resources

Human Resources will track completed Annual Development Plans to assist managers in ensuring each employee has a completed form each year.

Summary Policies and Procedures for the Program

Work Review Schedule

Current employees shall have a completed Annual Development Plan form by January 31st each year.

Transfer employees/managers

Current employees transferring into a different position at the agency will have a close-out Annual Development Plan form due within 10 days of the transfer. When managers transfer to other departments or leave the agency, they will complete a review of their current direct reports before leaving.

Coordination with employee prior to meeting

Prior to meeting, the manager will provide a blank Annual Development Plan form to the direct report to allow opportunity to prepare for the meeting. Prior to the Annual Development meeting, the manager will also provide the direct report with the most current job description.

Work Review Meeting

The meeting should be scheduled in advance, selecting a time that is mutually convenient to the manager and direct report. Typically, one hour should be set aside for the meeting. Care should be exercised to ensure there are no interruptions, and the meeting should be conducted in an office or another private area. Managers with direct reports in the field can utilize Skype as needed.

Acknowledgment, Review, and Retention of Work Reviews

Upon completion of each meeting, the manager shall forward the completed Annual Development Plan form to Human Resources. Human Resources will route it to the Director for approval. A copy of the fully signed Annual Development Plan form will be saved in the employee's personnel file.