

Scappoose Drainage Improvement Company

Employee Performance Evaluation

Process Description

What is the purpose of the SDIC employee performance evaluation process?

The SDIC's employee performance evaluation process includes a regularly scheduled and systematic evaluation of an employee's performance. The process provides an opportunity for the SDIC's employees to reflect on their performance, receive feedback from the employee's supervisor(s), share their concerns and/or suggestions with their employers, and set goals for the next performance evaluation period. Two-way communication is important for the success of the performance evaluation process. The process will include reflection on the organization's purpose and how an employee's job is important in achieving that purpose.

Who conducts the performance evaluation process?

The General Manager (GM) will conduct the performance evaluation process for the Field Operations Technician (FOT) and the Office Administrator (OA). The GM will invite ~~two~~ at least ~~one~~ members of the Board of Directors to participate in the process.

A designated member or members of the Board of Directors will conduct the performance evaluation process for the GM. The entire Board of Directors will participate in the process.

When will performance evaluations take place?

In the first year of employment, performance evaluations will take place at 6 and 12 months after hire. After the first year of employment, performance evaluations will take place annually.

How will the performance evaluation process be conducted?

The performance evaluation process will be conducted as follows:

- 1) The employee will be notified by the GM or designated Board member(s), as appropriate, that the performance evaluation process is under way. The employee will be given this Process Description so the employee knows what to expect.
- 2) The employee and the GM (or designated Board member(s)) will establish a timeline for the performance evaluation process including a time for the performance evaluation meeting.

- 3) The employee will be given a copy of the Self-Evaluation Form to complete in advance of the performance evaluation meeting.
- 4) A) The GM will complete Performance Evaluation Forms for the FOT and OA. Prior to the performance evaluation meeting, the Performance Evaluation Forms will be reviewed by the GM and the ~~two~~ invited Board members.
B) The Board of Directors will complete a Performance Evaluation Form for the GM.
- 5) The next step in the process is the performance evaluation meeting. This meeting will begin with a reminder of its purpose. Based on the completed Self-Evaluation Form that the employee brings to this meeting, the employee will share any observations about his/her own performance during the performance evaluation period. The GM (or designated Board member(s)) will also go over the Performance Evaluation Form with the employee, asking pertinent questions as needed. The employee will be given the opportunity to ask questions or to share any concerns or suggestions about his/her job description or conditions of employment.
- 6) Goal-setting will take place during the performance evaluation meeting. The employee and the GM (or the Board of Directors, as appropriate) will work together to develop specific goals based on the Performance Evaluation Form and/or needs of the SDIC.
- 7) Further actions may be discussed in the performance evaluation meeting. Examples include additional training, increased compensation or other rewards, termination of employment, or other actions. Depending on the nature of the action discussed, applicable public meetings laws may require that a decision be made in a public meeting of the SDIC board.
- 8) The Performance Evaluation Form prepared for the employee, including any comments added as a result of the performance evaluation meeting, should be signed by both the employee and the GM (or designated Board member(s)). The employee will receive a copy of the signed Performance Evaluation Form, and the original will be kept in the Employee's personnel file.
- 9) If further actions were determined in the performance evaluation meeting, the employee and the GM (or designated Board member (s)) should discuss during the performance evaluation meeting a schedule for completion of the actions.

Scappoose Drainage Improvement Company

Employee Compensation Adjustment Plan

~~Fiscal Year 2021-22 (July 1, 2021 – June 30, 2022)~~

~~The SDIC Board of Directors staffing subcommittee recommends that the Board adopt the following “Phase I” plan for compensation adjustment to be given on the one-year anniversary of employment for employees who are filling permanent SDIC staff positions, which currently are General Manager, Field Operations Technician, and Office Administrator.~~

Phase I

- A) Step adjustment: Effective on the first anniversary of the employee’s hire date, and annually thereafter, the employee will receive at least a 0.5% increase in hourly wage.
- B) Cost of Living Adjustments (COLA): ~~Effective on~~ Following the first anniversary of the employee’s hire date, the employee ~~will is eligible to~~ receive a cost-of-living adjustment. ~~(increase) of at least 1.5%.~~ COLA’s will be determined by the board of directors annually in January.
- C) Consideration of a bonus for the General Manager: The Board of Directors may give a bonus to the General Manager based on his/her performance and the SDIC budget.

Notes:

- ~~1) The duties of the Office Administrator currently are performed by an independent contractor. The compensation paid the contractor is based on contract, and the provisions of this employee compensation adjustment plan do not apply to this position at this time.~~
- 2) COLA’s will be determined by the board of directors using the US Bureau of Labor and Statistics Consumer Price Index, West Region, Urban Consumers (CPI-U) as a guideline.
- 3) Employees hired for special projects are not permanent employees and are not part of this compensation plan.
- 4) The SDIC currently does not participate in the Oregon Public Employees Retirement System (“PERS”) and, according to advice of counsel, is not required to participate in PERS.
- 5) Beginning in 2020 and every two years thereafter a wage analysis for the three positions will be performed by HR Answers, or the current Human Resources consultant for Special Districts Association of Oregon.

Phase II

~~For fiscal year 2022-23 and beyond, the staffing subcommittee recommends, based on guidance from HR Answers, Inc., that the SDIC Board adopt a longer term schedule of step increases for permanent positions other than General Manager. Also based on guidance from HR Answers, the subcommittee recommends that the Board reward strong performance by the General Manager through annual bonuses, which will not be a requirement but rather an option based on the General Manager’s performance and budget constraints.~~

~~The subcommittee further recommends that Phase II include establishment of a defined method for calculating annual COLAs and that the COLAs be factored into the SDIC budget when it is adopted each year.~~

~~Finally, the subcommittee recommends that Phase II include a request to SDAO to update the~~

~~wage analysis SDAO performed in 2020 to assist SDIC in setting the salary range for the then-newly-created positions of General Manager and Field Operations Technician. Updated information on wages paid for comparable positions in other districts will assist development of scheduled increases.~~

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**Scappoose Drainage Improvement Company
Performance Review: General Manager**

For the period beginning _____ and ending _____.

One copy of this form will be completed by the General Manager as a self-evaluation before the in-person performance review. One copy will be completed by the SDIC Board.

Ratings: **U** = Unsatisfactory NI = Needs Improvement ME = Meets Expectations
 EE = Exceeds Expectations **O** = Outstanding N/A = Not Applicable

Essential Position Functions:	U	NI	ME	EE	O	N/A
Operations and Management	--	--	--	--	--	--
Responsible for the effective and efficient management of the SDIC						
Directs all SDIC staff and consultant activities, office management, and daily operations management of the SDIC						
Manages short and long-term financial performance and reports to the SDIC Board at monthly meetings						
Prepares the annual budget for presentation and approval by the SDIC Board						
Works with the appropriate SDIC Board member(s) to ensure preparation and submission of annual SDIC assessments to the Columbia County Assessor is accurate and timely						
Researches and applies for grants appropriate to further the work of the SDIC						
Approves payroll to ensure accuracy and timely payment of employees						
Provides annual training opportunities for employees						
Regularly updates and maintains Employee Policy & Procedure Manual						
Regularly updates and maintains Operations & Maintenance Manual, including the Emergency Action Plan						
Performs other duties as requested by the SDIC Board of Directors						
Communications and Outreach	--	--	--	--	--	--
Works with the SDIC Board President to set the monthly meeting agenda						
Proactively gathers information and researches issues pertinent to the operations of SDIC						
Brings issues and information to the attention of the SDIC Board that have potential to impact policy decisions						
Builds productive relationships with the SDIC Board, landowners, businesses, and government officials within the district and having authority over the SDIC						
Prepares annual report for landowners						
Directs website maintenance						

	U	NI	ME	EE	O	N/A
Maintains communications and attends meetings with the SDIC Board, providing relevant reports in advance of meetings						
Ensures the SDIC Board has appropriate training resources and support annually						
Regulatory Compliance	--	--	--	--	--	--
Maintains education and awareness of regulatory requirements and best practices for drainage districts						
Ensures compliance with all Federal, State, and other laws applicable to the district, reporting any concerns to the Board in a timely manner						
Works with landowners to eliminate levee encroachments						
Ensures email and all SDIC documents are maintained in accordance with acceptable State of Oregon Archival standards and schedules						
Ensures timely and complete reporting and record-keeping for regulatory agencies						
Maintenance and Construction	--	--	--	--	--	--
Ensures Board-approved project list is performed in a timely and efficient manner						
Directs all projects from design through construction; responsible to ensure project schedules, cost estimates and project reports are meeting expectations						
Prepares bid packages in accordance with Public Contracting requirements						
Approves equipment purchases and disposal of surplus equipment						
Education and Training:						
Maintains certifications and licenses as required						
Attends other training as appropriate and as requested						
Skills:						
Attendance and punctuality						
Communication skills						
Organization skills						
Professionalism						
Initiative						
Teamwork						

Questions for the General Manager:

1. Please explain how you have achieved your goals from your previous performance review (or hire date, if this is the first review). Based on your job description, what else have you accomplished or done well as an employee of the SDIC?

**Scappoose Drainage Improvement Company
Performance Review: Field Operations Technician**

For the period beginning _____ and ending _____.

One copy of this form will be completed by the Field Operations Technician as a self-evaluation before the in-person performance review. One copy will be completed by the General Manager.

Ratings: **U** = Unsatisfactory NI = Needs Improvement ME = Meets Expectations
 EE = Exceeds Expectations **O** = Outstanding N/A = Not Applicable

Essential Position Functions:	U	NI	ME	EE	O	N/A
Operates and maintains the levee system, drainage canals, and pumping systems within the SDIC						
Performs maintenance and repairs of the levee system and SDIC equipment as needed						
Manually clears weeds and debris from pump racks and performs other manual tasks						
Applies herbicides and pesticides						
Works as directed with landowners to eliminate levee encroachments						
Assists with construction projects as requested						
Maintains a daily log of activities and pumping operations						
Brings issues and information to the attention of the General Manager that have potential to impact the SDIC						
Attends meetings with the Board as requested						
Ensures compliance with all Federal, State, and other laws applicable to the district						
Ensures email and all SDIC documents are maintained in accordance with acceptable State of Oregon Archival standards and schedules						
Performs other duties as requested by the General Manager						
Education and Training:						
Maintains a valid driver's license and a good driving record						
Attends training as requested						
Skills:						
Attendance and punctuality						
Communication skills						
Organization skills						
Professionalism						
Initiative						
Teamwork						

Questions for the Field Operations Technician:

1. Please explain how you have achieved your goals from your previous performance review (or hire date, if this is the first review). Based on your job description, what else have you accomplished or done well as an employee of the SDIC?

2. Based on your job description, how could you improve as an employee of the SDIC?

3. What do you need from the SDIC to be more successful as an employee?

FUTURE GOALS (mutually agreed upon for next review period):

Additional Comments:

Signatures:

_____	_____	_____	_____
Field Operations Technician	Date	General Manager	Date
Printed Name: _____		Printed Name: _____	

**Scappoose Drainage Improvement Company
Performance Review: Office Administrator**

For the period beginning _____ and ending _____.

One copy of this form will be completed by the Office Administrator as a self-evaluation before the in-person performance review. One copy will be completed by the General Manager.

Ratings: ~~U~~ = Unsatisfactory NI = Needs Improvement ME = Meets Expectations
 EE = Exceeds Expectations ~~O~~ = Outstanding N/A = Not Applicable

Essential Position Functions:	U	NI	ME	EE	O	N/A
Performs timely and efficient accounting and administrative duties						
Processes invoices using QuickBooks bill paying system						
Prepares reimbursable expense accounting						
Reconciles bank accounts monthly						
Prepares monthly and quarterly payroll accounting						
Prepares monthly financial reports for the General Manager to present at Board meetings						
Prepares information necessary for tax preparation						
Produces year-end close financials at the end of each fiscal year						
Prepares year-end 1099s and W-2s						
Responds to correspondence as needed						
Maintains email and all other SDIC documents in accordance with acceptable State of Oregon Archival standards and schedules						
Maintains the SDIC website as requested by the General Manager						
Attends Board meetings as requested						
Performs follow-up tasks at the completion of each SDIC Board meeting as requested						
Ensures the General Manager is aware of issues or concerns that have potential to impact the SDIC						
Performs other duties as requested by the General Manager						
Education and Training:						
Maintains certifications and licenses as required						
Attends training as requested						
Skills:						
Attendance and punctuality						
Communication skills						
Organization skills						
Professionalism						
Initiative						
Teamwork						

Questions for the Office Administrator:

1. Please explain how you have achieved your goals from your previous performance review (or hire date, if this is the first review). Based on your job description, what else have you accomplished or done well as an employee of the SDIC?

2. Based on your job description, how could you improve as an employee of the SDIC?

3. What do you need from the SDIC to be more successful as an employee?

FUTURE GOALS (mutually agreed upon for next review period):

Additional Comments:

Signatures:

_____	_____	_____	_____
Office Administrator	Date	General Manager	Date
Printed Name: _____		Printed Name: _____	