

From: Roger Donaldson, Chair Budget and Oversight of Public Elections Committee

To: SF Budget and Oversight of Public Elections Committee

Subject: 2017 Performance Appraisal, Director of Elections

Date: 6 September 2017

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The SF Elections Commission undertakes a performance appraisal of the Director of Elections 1 time per year. At the 16 August 2017 meeting of the SF Elections Commission the appraisal process for 2017 was agendaized and Commissioners expressed interest in reviewing various aspects of the appraisal process. As a result, the process was referred to BOPEC for review for the purpose of possible changes to the process to be considered at the September 2017 Elections Commission meeting.

Below is a proposal for the 2017 process. This proposal was developed based on conversations with the City and County of San Francisco (CCSF) Department of Human Resources Workforce Development Director Donna Kotate on referral from Deputy City Attorney Cecilia Mangoba.

The Elections Commission (SFEC) has a proposed use of the "Guidelines for Evaluation of Director of Elections" adopted 16 March 2016 by the SFEC to appraise the Director's job performance that. CCSF Department of Human Resources recommends a different form and process for employee evaluation including Department heads. The proposal allows for the completion of a 2017 retrospective appraisal based on the adopted SFEC Guidelines and alignment with the Department of Human Resources process for the prospective 2018 appraisal process.

#### **Proposed Process for 2017 Appraisal Cycle**

Evaluation of past year's performance: Utilize the existing 2016 Form and Guidelines with the following modifications:

- Evaluation Form: Breakout specific items under section II.3 Communication > Implements the commissions policies. For example, this section should include an item for the Open Source Voting Project and others that the Election Commission sees fit to add for the appraisal period
- Evaluation Interviews: Do not perform interviews with employees of the department. This is due to indications that these interviews may effect department moral and that interviewing only 1 or 2 individuals may not provide meaningful insight into the Director's performance.
- Employee Survey: Do not employ an employee survey at this time due to short lead time for implementation.

Evaluation of next years performance: Align with the Department of HRs recommended approach to performance appraisals. This includes aligning the appraisal cycle to the CCSF Fiscal Year and setting Performance Plan – Goals for the year ahead. It also includes taking advantage of the Employee Engagement survey program piloted by the Department of Human Resources.

- Evaluation Form: Utilize the Department of Human Resources "Strategic Plan and Performance Plan/Appraisal" to set out Performance Plan items for the next fiscal year. Note that this can and should be modified as needed when/if goals change during the year.
- Employee Survey: Perform an Employee Engagement Survey in advance of the 2018 appraisal cycle under the guidelines provided by the Department of Human Resources.