



City of San Diego
Civil Service Commission

AGENDA

Nicolaz Portillo, President
Will Moore, Vice President
Joy Freeman, Commissioner
Samuel Merrill, Commissioner
Trang Pham, Commissioner

Thursday, March 5, 2026, at 1:00 p.m.
Civil Service Commission Room
Civic Center Plaza
1200 Third Ave, Suite 300
San Diego, California 92101

Virtual Participation: <https://sandiego.zoomgov.com/j/1602402238>

To join by telephone: Dial 1-669-254-5252. When prompted, input Webinar ID: 160 240 2238#

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ITEMS FOR ACTION

INTRODUCTION

ACTION TAKEN/PENDING

1. Roll Call.
2. Report Out of Closed Session.

NON-AGENDA PUBLIC COMMENT

This portion of the agenda provides an opportunity for members of the public to address the Commission on items of interest within the jurisdiction of the Commission. (Comments relating to items on today's docket are to be taken at the time the item is heard.)

Time allotted to each speaker is determined by the Chair. Comments are limited to no more than five (5) minutes **total per subject** regardless of the number of those wishing to speak. Pursuant to the Brown Act, no discussion or action, other than a referral, shall be taken by the Commission on any issue brought forth under "Non-Agenda Public Comment."

CONSENT AGENDA (Items 3 to 7 can be approved with one motion.)

3. Approval of the minutes for the regular meeting of February 5, 2026.
4. Melissa E. Barbour, Librarian II, Library Department, for a one-year special leave without pay ending February 21, 2027, with their name to be placed the eligible lists for Librarian II, Librarian I, and Library Assistant III.
Hire Date: April 25, 2016
Reason: Medical.
Department Recommendation: Approve.

5. Jason P. Belgau, Code Compliance Officer, Environmental Services Department, for a one-year special leave without pay ending March 10, 2027, with their job to be saved.
Hire Date: August 17, 2024
Reason: Relocation.
Department Recommendation: Approve.
6. Lance W. Schlager, Combination Inspector I, Development Services Department, for a one-year special leave without pay ending February 12, 2027, with their name to be placed on the eligible lists for Combination Inspector I, Electrical Inspector I, Structural Inspector I, Zoning Investigator II, and Zoning Investigator I.
Hire Date: January 7, 2023
Reason: Need additional time to obtain International Code Council Certification.
Department Recommendation: Approve.
7. Approval of the minutes of the San Diego City Civil Service Commission Joint Apprenticeship Committee meetings of July 22, 2025, and October 7, 2025.

LEAVE OF ABSENCE WITHOUT PAY – DISCUSSION

8. Lilian Montijo, Account Clerk, Office of the City Attorney, for a four-month special leave without pay ending June 30, 2026, with their job to be saved.
Hire Date: April 8, 2019
Reason: Medical.
Department Recommendation: Modify to name on eligible list.

POLICY ITEM – DISCUSSION

9. Revisions to Personnel Manual Index Code G-7 and Index Code G-7A.

INFORMATIONAL ITEM

10. Request from Vice President Moore for a report from the Personnel Director.



City of San Diego
Civil Service Commission

CLOSED SESSION AGENDA

Nicolaz Portillo, President
Will Moore, Vice President
Joy Freeman, Commissioner
Samuel Merrill, Commissioner
Trang Pham, Commissioner

Thursday, March 5, 2026, at 10:30 a.m.
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CLOSED SESSION

NOTE: The Commission will convene at 10:30 a.m. to hear public comment of the Closed Session Agenda. Public testimony for the Closed Session Agenda will be taken before adjourning into closed session. At the close of public comment, the Commission will adjourn the public session and go into closed session. The regular meeting will begin at 1:00 p.m.

PUBLIC EMPLOYMENT – Employment disqualification appeals pursuant to California Government Code section 54957(b)(1):

1. Garret N. Abeyta, appealing their conviction record disqualification for the position of Laborer.
2. Dupree L. Adkins Jr., appealing their conviction record disqualification for the position of Liability Claims Representative I.
3. Richard L. Bueno, appealing their conviction record disqualification for the position of Laborer.
4. DeEdward L. Cunningham, appealing their conviction record disqualification for the position of Recreation Aide.
5. Kevon D. Mitchell, appealing their conviction record disqualification for the position of Grounds Maintenance Worker I.
6. Jose C. Rodriguez Jr., appealing their conviction record disqualification for the position of Laborer.
7. Trey O. Sinegal, appealing their conviction record disqualification for the position of Laborer.
8. Trevor H. Bennett, appealing their medical disqualification for the position of Lifeguard I.

PUBLIC EMPLOYMENT – Disciplinary appeals pursuant to California Government Code section 54957(b)(1):

9. 2024-2, appealing their suspension from the position of Police Officer II.
10. Steven Glover, appealing their termination from the position of Sanitation Driver II.
11. Derrick Whitlock, appealing their termination from the position of Associate Department Human Resources Analyst.

**CITY OF SAN DIEGO
MINUTES OF THE MEETING OF THE
CIVIL SERVICE COMMISSION**

Thursday, February 5, 2026, at 1:00 p.m.
Civil Service Commission Room
Civic Center Plaza
1200 Third Ave, Suite 300
San Diego, California 92101

- A. The regular business meeting of the Civil Service Commission was called to order by President Nicolaz Portillo at 1:20 p.m. Also present were Vice President Will Moore, Commissioner Joy Freeman, and Commissioner Samuel Merrill. Commissioner Trang Pham was absent.

- B. The staff was represented by Personnel Director David Dalager, Assistant Personnel Director Anne Lamén Aban, and Assistant to the Director Saba O'Neal. Serving as legal advisor to the Commission was Senior Deputy City Attorney David Karlin.



City of San Diego
Civil Service Commission

MINUTES

Nicolaz Portillo, President
Will Moore, Vice President
Joy Freeman, Commissioner
Samuel Merrill, Commissioner
Trang Pham, Commissioner

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ITEMS FOR ACTION

INTRODUCTION

1. Roll Call.
2. Report Out of Closed Session.

ACTION TAKEN/PENDING

Present were President Portillo, Vice President Moore, Commissioner Freeman, and Commissioner Merrill.
Commissioner Pham was absent.

At 1:21 p.m., Saba O'Neal reported out the actions of closed session.

NON-AGENDA PUBLIC COMMENT

This portion of the agenda provides an opportunity for members of the public to address the Commission on items of interest within the jurisdiction of the Commission. (Comments relating to items on today's docket are to be taken at the time the item is heard.)

Time allotted to each speaker is determined by the Chair. Comments are limited to no more than five (5) minutes **total per subject** regardless of the number of those wishing to speak. Pursuant to the Brown Act, no discussion or action, other than a referral, shall be taken by the Commission on any issue brought forth under "Non-Agenda Public Comment."

CONSENT AGENDA (Items 3 to 10 can be approved with one motion.)

- | | | |
|----|---|--|
| 3. | Approval of the minutes for the regular meeting of December 4, 2025. | Vice President Moore made a motion to approve item 3 and items 5-10. Commissioner Freeman seconded the motion. Approved 4-0. Item 4 was withdrawn. |
| 4. | Approval of Exceptional Merit Increase for Andres Molina, Administrative Aide II. | |
| 5. | Cody L. Churchman, Fire Captain, Fire-Rescue Department, for a one-year special leave without pay ending March 31, 2027, with their name to be placed on the eligible lists for Fire Captain and Fire Engineer. Hire Date: July 5, 2014 Reason: Childcare. Department Recommendation: Approve. | |
| 6. | Rosemarie R.O. Cofer, Laboratory Technician, Public Utilities Department, for a one-year special leave without pay ending January 2, 2027, with their name to be placed on the eligible list for Laboratory Technician. Hire Date: March 18, 2023 Reason: Childcare and Education. Department Recommendation: Approve. | |

7. Reginald R. Gobaleza, Library Assistant III, Library Department, for a one-year (second extension) special leave without pay ending December 8, 2026, with their name to be placed on the eligible list for Library Assistant III.
Hire Date: September 4, 2012
Reason: Education.
Department Recommendation: Approve.
8. Jasmine B. Harris, Police Investigative Service Officer II, Police Department, for a one-year special leave without pay ending January 4, 2027, with their name to be placed on the eligible lists for Police Investigative Service Officer II and Police Investigative Service Officer I.
Hire Date: February 24, 2022
Reason: Childcare.
Department Recommendation: Approve.
9. Robert A. Bunsold, Fire Battalion Chief, Fire-Rescue Department, for a leave of absence from the Classified Service effective December 6, 2025, while filling an unclassified position with their name to be placed on the appropriate eligible list.
Hire Date: May 17, 2003
10. Kevin J. Pendleton, Fire Battalion Chief, Fire-Rescue Department, for a leave of absence from the Classified Service effective January 3, 2026, while filling an unclassified position with their name to be placed on the appropriate eligible list.
Hire Date: October 7, 2006

LEAVE OF ABSENCE WITHOUT PAY – DISCUSSION

11. Brandon T. Howard, Senior Wastewater Operations Supervisor, Public Utilities Department, for a two-month special leave without pay ending March 6, 2026, with their job to be saved.
Hire Date: December 13, 2021
Reason: Outside Employment.
Department Recommendation: Modify to name on eligible list.

Commissioner Freeman made a motion to approve the request.
Commissioner Merrill seconded the motion.
Approved 3-1.
President Portillo voted no.
Speaking for staff was Carissa Rosemore.
Speaking for the department was Tim Carroll.

POLICY ITEMS – DISCUSSION

- | | |
|--|--|
| 12. Proposed Salary Review Process for Fiscal Year 2028. | Vice President Moore made a motion to approve the Salary Review Process. President Portillo seconded the motion. Approved 4-0. Speaking for staff was Jennifer Lamas-Villanueva. |
|--|--|

INFORMATIONAL ITEMS

- | | |
|---|--|
| 13. Request from Commissioner Merrill for a presentation on investigatory interviews. | Informational item only. Speaking for the Human Resources Department was Abby Jarl-Veltz. |
| 14. Report on limited and restricted appointments and special differential positions for CY 2025. | Informational item only. Speaking for staff was Carissa Rosemore. |
| 15. Request from Commissioner Merrill for an update on the Equal Employment Opportunity Report. | Informational item only. Speaking for staff was Darren Keenaghan. |
| 16. Request from Vice President Moore for a report from the Personnel Director. | Informational item only. The new contract for NEOGOV, the City's applicant tracking system, was approved by City Council on February 2, 2026. The new contract, effective April 1, 2026, expands the City's use of NEOGOV by adding two key modules – Onboard and Attract. Speaking for staff was David Dalager. |

At 1:20 p.m., the meeting commenced.

There being no further business, the meeting was adjourned at 2:02 p.m.

**SAN DIEGO CITY CIVIL SERVICE COMMISSION
JOINT APPRENTICESHIP COMMITTEE MEETING: SPECIAL SESSION**

MINUTES

**Tuesday, July 22nd, 2025, at 10:30 A.M.
Civil Service Commission Room
1200 Third Avenue, Suite 300, San Diego, CA 92101
&
Microsoft Teams Meeting**

I. CALL MEETING TO ORDER

The meeting was called to order at 10:30 AM by Joint Apprenticeship Committee (JAC) Chairperson Wesley Greeson.

II. ATTENDANCE

Members: Samuel Hagos, Harold Leggate, Wesley Greeson, Paul Garibay, Sam Perez, Maico Alejo

Alternates: James Doll, Harold Guevara, Epifanio Rios, Angel Martinez

Apprentices: Victor Delgadillo, Anuar Martinez, Raul Guerrero, German V. Esquiliano, Bennet Sceusa, Ly Ung, Ashley De Lao-Ratcliffe, Nicholas Arroyo, Joshua Montalvo

III. MINUTES

The minutes for the January 21, 2025 Meeting, the March 11, 2025 Special Session, and the May 28, 2025 Special Session were unanimously approved.

IV. APPRENTICES TO REPORT

The following Apprentices were approved to advance after presenting documentation verifying completion of the required work and school hours for a period.

| NAME | TRADE | ADVANCE TO PERIOD | STARTED | LAST ADVANCED |
|-------------------------|---------------------------|-------------------|------------|---------------|
| Victor Delgadillo | Communications Technician | 5 | 7/8/2023 | 1/21/2025 |
| Raul Guerrero Jr. | Communications Technician | 6 | 7/8/2023 | 1/21/2025 |
| Bennett Sceusa | Communications Technician | JL | 10/30/2021 | 1/21/2025 |
| Ly Ung | Communications Technician | 6 | 7/8/2023 | 1/21/2025 |
| Anuar Martinez | HVACR Technician | 4 | 11/11/2023 | 1/21/2025 |
| German V. Esquiliano | Fleet Technician | 4 | 11/11/2023 | 1/21/2025 |
| Ashley De Lao-Ratcliffe | Electrician | N/A | 2/17/2025 | 3/11/2025 |
| Nicholas Arroyo | Electrician | N/A | 2/17/2025 | 3/11/2025 |
| Joshua Montalvo | Electrician | N/A | 5/5/2025 | 5/28/2025 |

V. NEW BUSINESS

Epifanio “Rocky” Rios’ nomination to the vacant alternate management seat was approved by the CSC on July 3, 2025.

VI. REPORTS

1. State of California, Division of Apprenticeship Standards (DAS) Consultant Lilian Reaves was present.
2. Community College Advisor Sheila Davis was not present.
3. Joint Apprenticeship Committee Chairperson did not report.
4. Joint Apprenticeship Committee Secretary did not report.

VII. ADJOURNMENT

There being no further business, the meeting was adjourned at 11:25 A.M.

**SAN DIEGO CITY CIVIL SERVICE COMMISSION
JOINT APPRENTICESHIP COMMITTEE MEETING: SPECIAL SESSION**

MINUTES

**Tuesday, October 7th, 2025, at 1:00 P.M.
Civil Service Commission Room
1200 Third Avenue, Suite 300, San Diego, CA 92101
&
Microsoft Teams Meeting**

I. CALL MEETING TO ORDER

The meeting was called to order at 1:00 PM by Joint Apprenticeship Committee (JAC) Chairperson Wesley Greeson.

II. ATTENDANCE

Members: Samuel Hagos, Harold Leggate, Wesley Greeson, Paul Garibay, Maico Alejo

Alternates: James Doll, Harold Guevara, Edgar Portilla, Epifanio Rios

Apprentices: Carlos Arroyo, Nicholas Arroyo

III. MINUTES

No minutes to approve.

IV. APPRENTICES TO REPORT

The following Apprentices were indentured and approved to advance.

| NAME | TRADE | STARTED | ACTION TAKEN |
|---------------|--------------|----------------|---------------------|
| Carlos Arroyo | Electrician | 9/27/2025 | Indentured |

V. NEW BUSINESS

No new business to discuss.

VI. REPORTS

1. State of California, Division of Apprenticeship Standards (DAS) Consultant Lilian Reaves was present.
2. Community College Advisor Sheila Davis was not present.
3. Joint Apprenticeship Committee Chairperson did not report.
4. Joint Apprenticeship Committee Secretary did not report.

VII. ADJOURNMENT

There being no further business, the meeting was adjourned at 1:11 P.M.



THE CITY OF SAN DIEGO

M E M O R A N D U M

DATE: February 27, 2026

TO: Civil Service Commission

FROM: David Dalager, Personnel Director

SUBJECT: Request for Special Leave Without Pay for Lilian Montijo, Account Clerk

Lilian Montijo, Account Clerk, is requesting a four-month special leave without pay ending June 30, 2026, with their job to be saved.

Lilian Montijo is requesting this leave for medical reasons. The Office of the City Attorney is recommending modification of this request to name on list because the employee's absence would result in continued hardship to the department since this position is responsible for several fiscal processes and duties.

This request is brought to the attention of the Commission as it does not meet the criteria set forth by Civil Service Rule X, Section 9, which states, "An employee whose work record has been satisfactory...may be granted special leave of absence without pay..."

On June 24, 2025, Lilian Montijo was notified that she would be receiving a supplemental performance report. Lilian Montijo has been employed with the City since April 8, 2019.

A handwritten signature in blue ink, appearing to read "David Dalager".

David Dalager
Personnel Director

DD:MC:sm

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THE CITY OF SAN DIEGO

M E M O R A N D U M

DATE: February 27, 2025

TO: Civil Service Commission

FROM: David Dalager, Personnel Director

SUBJECT: Revisions to Personnel Manual Index Code G-7 and Index Code G-7A, Employee Performance Review Program

Attached for your review and approval are proposed revisions to Personnel Manual Index Code G-7 and G-7A, Employee Performance Review Program. Proposed deletions are struck through and additions are in *bold and italics* (Attachment 2 and Attachment 3).

The proposed revisions are being requested by the Fire-Rescue Department and Local 145 to transition the Employee Performance Review (EPR) Program for employees represented by Local 145 from Index Code G-7 to Index Code G-7A (Attachment 1). This change would bring employees represented by Local 145 into alignment with all other Classified employees that operate under Index Code G-7A.

The Fire-Rescue Department will update employee performance plans, change the evaluation rating period, and transition performance evaluations to the online EPR process. The effective date for the implementation of the proposed revisions is July 1, 2026.

As a result of this transition, Index Code G-7 will be deleted from the Personnel Manual since Local 145 is the only recognized employee organization utilizing this index code.

In addition, the proposed revisions clarify that Index Code G-7A also applies to Classified unrepresented employees and reflect the change in name for the recognized employee organization representing Lifeguards from Teamsters Local 911 to Teamsters Local 986.

Staff recommends approval of the proposed revisions to Personnel Manual Index Code G-7 and Index Code G-7A.

David Dalager
Personnel Director

DD:ES:sm

- Attachment: 1. Request to Change Employee Performance Review Program for Local 145 Members from Personnel Manual Index Code G-7 to Index Code G-7A
2. Personnel Manual Index Code G-7, Employee Performance Review Program, IAFF Local 145
3. Personnel Manual Index Code G-7A, Employee Performance Review Program, AFSCME Local 127, Police Officers Association, Municipal Employees Association and Teamsters Local 911



THE CITY OF SAN DIEGO

M E M O R A N D U M

DATE: December 10, 2025

TO: Civil Service Commission
Via David Dalager, Personnel Director *ONS*

FROM: Robert Logan, Fire Chief, Fire-Rescue Department

SUBJECT: Request to Change Employee Performance Review Process for Local 145
Members from Personnel Manual Index Code G-7 to G-7A

The purpose of this memo is to request approval from the Civil Service Commission to change the Employee Performance Review process for Local 145 Members from Personnel Manual Index Code G-7 to G-7A.

This change will bring Local 145 in line with the City's other recognized employee organizations who currently utilize the G-7A process.

Per the attached email communication, George Duardo, President of Local 145, has agreed to the changes outlined in the email. The changes would be moving performance evaluations from G-7 to G-7A, updating employee performance plans, transitioning performance evaluations to the online process, and changing the evaluation rating period for employees based on their date of employment in the classification versus an annual cycle of July 1st through June 30th of each year.

If you have any questions, please contact Robert Bunsold, Deputy Fire Chief, at RBunsold@sandiego.gov.

Thank you,

A handwritten signature in blue ink, appearing to read "Rob Logan".

Robert Logan
Fire Chief

Subject Line: Change of EPR Process for Local 145 from G7 to G7A

Good afternoon L-145 Board,

I'd like to thank you and the Local 145 Board for allowing us to brief you on the Fire-Rescue Department's request to change the Employee Performance Report process from Personnel Manual Section G7 to G7A.

As we discussed, the main changes in moving to the G7A process are that there is no longer a rating of an employee's overall performance. If the employee is receiving an evaluation, they are considered to be meeting standards. The same tools are in place for employees who are not meeting standards through the supplemental performance report and performance development plan. We also discussed the optional "Commendation" form, which allows supervisors to recognize employees who go above and beyond their normal scope of duties. The commendation would become a permanent part of the employee's Personnel file.

Another change would be to evaluate employees in alignment with their date of rate (once off probation) instead of having all sworn evaluations due on July 1st of each year. We believe this will reduce the administrative burden on supervisors.

As we mentioned, Local 145 is the only Recognized Employee Organization currently on G7. All other classified City employees utilize the G7A process for several years. Additionally, the City has transitioned the employee performance report process to SuccessFactors, allowing all evaluations to be conducted online.

Please let us know if Local145 agrees to change to G7A by responding to this email.

The next steps would be to seek approval from the Civil Service Commission. Once approved, we would like to form a small committee to update the current employee performance plans and create plans for all straight-day assignments. Next, we will work with Personnel and the Department of IT to move the entire process online. There is no current estimate of when this process could be moved online, but the goal is to have the system in place prior to July 1, 2026.

If there are any questions regarding the EPR process, please contact Curt Glaser at cwglaser@sandiego.gov. Other questions can be directed to me or Chief Bunsold.

Again, thank you for your time.

Willy Melendez

Deputy Fire Chief
Employee Services Division
San Diego Fire-Rescue Department
City of San Diego

C (619) 909-4180
wmelendez@sandiego.gov

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PERSONNEL REGULATIONS

City of San Diego

Index Code: G-7

September 1, 2011

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PERSONNEL MANUAL

~~Probationary Periods and Standards of Performance~~~~EMPLOYEE PERFORMANCE REVIEW PROGRAM~~~~IAFF Local 145~~~~I. AUTHORITY:~~

- ~~A. City Charter Section 127. STANDARDS OF EFFICIENCY.~~
- ~~B. Civil Service Rule XII. EFFICIENCY.~~
- ~~C. Civil Service Rule V, Section 6. RE EMPLOYMENT LISTS FOR REGULAR WORK.~~

~~II. POLICY:~~

- ~~A. The Performance Review Program is a tool used by supervisors to document, monitor, and evaluate employee performance in relation to the critical functions and performance standards of the employee's position in a fair, consistent, and objective manner.~~
- ~~B. The Performance Review Program consists of the following elements:
 - ~~1. Preparation of a Performance Plan that describes the functions and performance standards of an employee's job (Discussed in Section III).~~
 - ~~2. Evaluation of an employee's performance in relation to the Performance Plan (Discussed in Section IV; Supplemental evaluation of performance is discussed in Section V).~~
 - ~~3. Preparation of a Performance Development Plan to guide, train and develop employees (Discussed in Section VI).~~~~
- ~~C. The Performance Review Program shall be used to evaluate the performance of all classified employees (permanent, probationary, and limited).~~
- ~~D. Employee Performance Reports shall be completed:
 - ~~1. At six month intervals for probationary employees and for limited employees during the first year of employment in a classification (job).~~~~

PERSONNEL REGULATIONS

City of San Diego

Index Code: G-7

September 1, 2011

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PERSONNEL MANUAL

~~Probationary Periods and Standards of Performance~~

~~EMPLOYEE PERFORMANCE REVIEW PROGRAM~~

~~IAFF Local 145~~

- ~~2. An Employee Performance Report shall be completed prior to the completion of 60 days of active duty in the case of an appointment from a re-employment list of an eligible with permanent status in the class (job) or subdivision thereof, to a department or major division in which the eligible has never worked as a permanent employee for more than 60 days.~~
- ~~3. At one-year intervals on July 1st of every year for permanent employees and for limited employees following the first year of employment in a classification (job).~~
- ~~4. EXCEPTION: Employees in the class (job) of Fire Recruit are not given performance reports under this regulation. These employees must pass a number of job functions to successfully graduate from the academy. Once hired as a Fire Fighter I, performance reviews are given in conformance with this regulation.~~
- ~~5. Whenever it is necessary to rate performance between regular rating periods due to marked improvement or deterioration of performance or to otherwise make an official record of performance (Supplemental). (See Section V).~~

~~III. THE PERFORMANCE PLAN:~~

~~A. Purpose~~

- ~~1. The Employee Performance Plan describes the job and defines the performance requirements of that job so that employees know what they are supposed to do and how they are supposed to do it.~~
- ~~2. The documentation and discussion of essential job functions and required performance standards facilitates the evaluation process for employees and supervisors.~~

~~B. Procedure~~

- ~~1. It is the supervisor's responsibility to ensure that a Performance Plan is developed for each position under his or her supervision.~~
- ~~2. The development of the Performance Plan should begin with a thorough analysis of the major functions (responsibilities) of the position.~~

PERSONNEL REGULATIONS

City of San Diego

Index Code: G-7

September 1, 2011

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PERSONNEL MANUAL

~~Probationary Periods and Standards of Performance~~

~~EMPLOYEE PERFORMANCE REVIEW PROGRAM~~

~~IAFF Local 145~~

- a. ~~Each function should describe a major part of the job.~~
- b. ~~Record the major functions on the Performance Plan pages.~~
3. ~~For each function listed on the Performance Plan, the supervisor should determine what standards are required for proper and satisfactory performance.~~
 - a. ~~Performance standards should describe the major activities required to perform the function and indicate how much, in what time, how well, and/or in what manner the particular activities are to be done (See Addendum C).~~
 - b. ~~Record the appropriate performance standards for each function on the Performance Plan pages.~~
4. ~~Once the Performance Plan has been developed, the supervisor shall discuss it with the reviewer. The reviewer should verify that the Plan accurately reflects the duties of the position to be rated.~~
5. ~~The supervisor shall then discuss the Plan with the employee. This discussion and introduction of the Performance Plan to the employee is to take place when the employee first begins a job, or when the duties of a job change and it is necessary to revise an existing plan. This early discussion informs the employee of the job requirements before the formal evaluation takes place.~~
6. ~~The supervisor, reviewer, and employee shall sign the first page of the Employee Performance Report to verify the preparation, review, and discussion of the Performance Plan when it is first introduced to an employee starting a new job or when an existing plan is revised. The employee shall also sign each of the Performance Plan pages in the lower left hand corner to verify discussion of each function and its standards.~~
7. ~~The employee shall receive a completed copy of the Performance Plan.~~

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- ~~8. The supervisor should regard the Performance Plan as a changeable and flexible record.~~
 - ~~a. If the performance standards are inappropriate or significant changes in job functions occur, the supervisor should reevaluate and modify the Performance Plan to reflect this information. Changes made to the Performance Plan should be discussed with the employee, and the employee should be given a copy of the modified Plan. The employee should also sign any changed or new pages of the Performance Plan in the lower left hand corner.~~
 - ~~b. The supervisor should review the Performance Plan, when necessary, after each rating period and update it as necessary. This systematic review ensures that the employee's functions and performance standards reflect current job requirements.~~

~~IV. PERFORMANCE EVALUATION~~

~~A. Purpose~~

- ~~1. The accurate evaluation of employee performance provides the necessary recognition and documentation of an employee's strengths and weaknesses.~~
- ~~2. Recent Employee Performance Reports should be considered by supervisors, when appropriate, for administrative actions involving reward and discipline.~~

~~B. Procedure~~

- ~~1. Supervisory Responsibilities~~
 - ~~a. Employee performance shall be evaluated in relation to the job-related criteria indicated on the Performance Plan at the end of each rating period.~~
 - ~~b. Employee performance shall be rated by the employee's immediate supervisor. If the immediate supervisor is new, former supervisors and/or other appropriate persons, such as a lead person or higher level supervisor, should be consulted.~~

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~~e. Supervisors should continually monitor and document employee performance throughout the rating period to provide a proper basis for the subsequent evaluations made.~~

~~2. Rating Performance of Standards and Functions~~

~~a. Each performance standard should be evaluated in relation to the function(s) listed on the page.~~

~~b. After having evaluated the individual standards, the supervisor should next consider how performance of these standards relates to overall performance of the functions listed on the page.~~

~~c. Check the box below the rating level that is most descriptive of the employee's performance of each function.~~

Definitions of these levels are as follows:

~~OUTSTANDING Employee consistently excels in standards required to perform the function.~~

~~ABOVE STANDARD Employee often fulfills standards required to perform function in an above average manner.~~

~~SATISFACTORY Performance of standards for the function is generally competent and reliable.~~

~~BELOW STANDARD Employee often does not meet the standards required to perform the function.~~

~~UNSATISFACTORY Employee does not fulfill the performance standards for a significant portion of the function.~~

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~~3. Rating Overall Job Performance~~

- ~~a. After having rated all of the functions, the supervisor should next consider how performance of these functions (considering their relative importance) relates to the employee's overall job performance.~~
- ~~b. Check the box on the first page of the plan that is most descriptive of the employee's overall job performance.~~

~~Definitions of these levels are as follows:~~

- | | |
|-----------------------------------|---|
| <u>OUTSTANDING</u> | Employee excels in virtually all functions of the job. This employee brings many assets to the job in the areas of ability and performance. |
| <u>ABOVE STANDARD</u> | Employee performs all functions of the job competently and effectively while often exceeding the standards of Performance. |
| <u>SATISFACTORY</u> | Employee meets the standards of performance for practically all functions of the job. Performance is generally steady, reliable, and competent. |
| <u>*BELOW STANDARD</u> | Employee often does not meet the performance standards required to adequately perform job functions. |
| <u>*UNSATISFACTORY</u> | Employee does not achieve performance standards for a significant portion of the total job. Performance must improve significantly to reach an acceptable level. |

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~~*NOTE: An overall performance rating of Below Standard or Unsatisfactory shall include information as to what remedial action was discussed, what warning or disciplinary action may have been taken, and a follow up review date within 90 days. The follow up review shall be documented on the Performance Development Plan or a Supplemental Performance Report if the supervisor prefers.~~

- ~~e. The supervisor should use the overall job performance comments section to document an employee's overall progress in performing job functions and meeting performance standards, highlights of performance during the rating period, most outstanding achievements, areas needing improvement, and any other performance information considered to be important.~~

~~NOTE: Out of class assignments should not be considered by supervisors when evaluating the employee's performance in the regular class.~~

- ~~d. An employee approaching the end of the probationary period should not be retained if there is doubt as to the employee's ability and/or willingness to perform satisfactorily.~~

~~V. SUPPLEMENTAL PERFORMANCE REPORTS~~

~~A. Purpose~~

- ~~1. Supplemental Performance Reports provide supervisors with a tool to evaluate employee performance between regular rating periods.~~
- ~~2. A Supplemental Performance Report shall be completed by supervisors to make an official record (between regular ratings) of employee performance that has improved or deteriorated significantly from the previous Report.~~
- ~~3. A Supplemental Performance Report may also be completed by supervisors:~~
 - ~~a. To make an official record of the performance of an employee who is vacating his or her position prior to the conclusion of the regular rating period.~~

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- b. ~~At the time of a follow-up review of a Below Standard or Unsatisfactory Performance Report. (Supervisors may instead choose to document such follow-up reviews on the Performance Development Plan if an employee's performance problems are less serious).~~

~~B. Procedure~~

- ~~1. The procedures to complete and process a Supplemental Performance Report and the forms used are exactly the same as for a regular Employee Performance Report.~~
- ~~2. All Supplemental Employee Performance Reports shall include ratings and comments which explain fully the reasons for the ratings. (Refer to the performance rating definitions in Section IV, B, (2)(e).)~~

~~VI. PERFORMANCE DEVELOPMENT PLAN~~

~~A. Purpose~~

- ~~1. The Performance Development Plan is a tool available to supervisors to guide, train, and develop employees.~~
- ~~2. Performance ratings of Below Standard and Unsatisfactory for individual functions and/or for Overall Job Performance indicate that performance requires improvement to reach a satisfactory level. Whenever possible, Performance Development Plans should be developed by supervisors to assist employees in bringing such performance up to satisfactory levels.~~
- ~~3. The Performance Development Plan is to be used to document the follow-up reviews of employees with Overall Job Performance ratings of Below Standard or Unsatisfactory when the supervisor decides that such follow-up reviews do not have to be documented in Supplemental Performance Reports.~~
- ~~4. The Performance Development Plan may also be used by supervisors to provide guidance and assistance to employees with Satisfactory or higher performance ratings to develop in their jobs and careers.~~

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- ~~B. Procedure Employees with performance ratings in individual functions and/or Overall Job Performance of Below Standard or Unsatisfactory:~~
- ~~1. The supervisor should review the employee's Performance Plan to identify specific areas requiring improvement.~~
 - ~~2. Record the specific performance areas requiring improvement in the Performance Description section of the Performance Development Plan.~~
 - ~~3. Supervisors should determine the causes of performance problems in order to develop appropriate Development Plans.~~
 - ~~a. Inadequate performance may indicate that the employee lacks basic ability, job knowledge, motivation, skills, attitude, etc.~~
 - ~~b. Poor performance could be caused by the supervisor not adequately explaining or clarifying the job, the Performance Plan, departmental philosophy, or work priorities.~~
 - ~~c. Job related conditions that might cause performance problems include faulty equipment, excessive noise or distractions, as well as other factors.~~
 - ~~4. Record plans to improve performance in the Performance Development Plan section. Typical activities that might be recommended include:~~
 - ~~a. special assignments and remedial training;~~
 - ~~b. job related college or training classes; and~~
 - ~~c. counseling to improve attitude and/or interpersonal skills.~~
 - ~~5. When discussing the Performance Development Plan with the employee, the supervisor should inform the employee that performance improvement will be reviewed within an established time period which is indicated in writing on the Plan.~~

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- ~~6. At the end of the designated time period, the supervisor should complete the Follow up Review section of the Performance Development Plan by recording what actions have been taken to improve performance and how performance has changed, where applicable. If the supervisor used a Supplemental Performance Report to document a follow up review, this section of the Performance Development Plan should reference the Supplemental Performance Report.~~
 - ~~7. The supervisor should first discuss the Follow up Review with the reviewer and then with the employee.~~
 - ~~8. The supervisor, reviewer, and employee shall sign the Follow up Review to verify discussion of the evaluation.~~
 - ~~9. The original signed copy of the Performance Development Plan should be retained in the files of the department or division, and the employee should be given a copy of the complete form.~~
 - ~~10. If, at the time of the Follow up Review, the employee's Overall Job Performance changes, a copy of the latest first page of the Employee Performance Report, and a new Overall Job Performance Page should be forwarded to the Personnel Department no later than 15 days after the Follow up Review is conducted.~~
- ~~C. Procedure Employees with performance ratings of Satisfactory or higher in all areas.~~
- ~~1. The supervisor should consider the overall level of development and progress of an employee in his or her job or career ladder.~~
 - ~~2. The supervisor should discuss the employee's interests and goals for growth and development with him or her.~~
 - ~~3. Suggested areas for an employee's development should be recorded in the Performance Description section of the Performance Development Plan.~~
 - ~~4. Suggested activities and actions that may be taken by an employee to assist in his or her growth and development should be recorded in the Performance Development Plan section of the form.~~

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- ~~5. The establishment of a follow-up review date, a follow-up review, and signatures on the form by the supervisor, reviewer, and employee are not required.~~

~~VII. PERFORMANCE REPORT CONFERENCES~~

~~A. Supervisor-Reviewer Conference~~

- ~~1. The supervisor shall discuss all initial ratings and evaluations with the reviewer. Changes suggested by the reviewer should be considered by the supervisor. If the changes are justified, the supervisor should make them prior to the first presentation to the employee.~~
- ~~2. Unresolved differences between the judgments of the supervisor and the reviewer shall be decided by the department or division head.~~

~~B. Supervisor-Employee Conference~~

- ~~1. After the supervisor-reviewer conference, the supervisor and the employee shall review and discuss the Employee Performance Report in private. In appropriate circumstances, this conference may also be attended by employee and/or management representatives.~~
- ~~2. The supervisor should constructively discuss with the employee all ratings and evaluations of the functions, standards, overall job performance, and when indicated, the Performance Development Plan.~~
- ~~3. The supervisor should point out the employee's general progress in performing job functions and meeting performance standards; outstanding achievements; areas in which improvement is necessary; as well as any other performance information considered to be important.~~
- ~~4. The employee should be given an opportunity to discuss or protest the ratings and present grounds for a protest. If the protest is reasonable, the supervisor should change the ratings accordingly, after consulting with the reviewer.~~
- ~~5. The supervisor should also discuss the content of the performance plan and performance expectations with the employee for the next rating period.~~

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~~VIII. PROCESSING EMPLOYEE PERFORMANCE REPORTS~~

- A. ~~The employee shall sign the first page of the Employee Performance Report, each Performance Plan page (in the lower right hand corner), and the Overall Job Performance page in ink. The signatures indicate only that the supervisor has discussed the Report with the employee; they do not signify that the employee agrees with the ratings. If the employee refuses to sign the various pages of the Report, the supervisor shall initial and make a note to that effect in the spaces provided for the employee's signature.~~
- B. ~~The reviewer shall review the final ratings and sign and date the Report in ink.~~
- C. ~~The reviewer shall send the Report to the appointing authority or designated alternate for review and signature.~~
- D. ~~Appointing authorities shall check the Report to determine whether:~~
- ~~1. the Report has been completed on schedule and according to the procedures outlined in this Manual section;~~
 - ~~2. ratings reflect an objective evaluation of employee performance in relation to the published standards;~~
 - ~~3. ratings are fully explained in the comments section(s);~~
 - ~~4. all signatures are in ink; and~~
 - ~~5. any changes have been initialed by all concerned and explained in the comment section(s).~~
- E. ~~Any changes to be made by the appointing authority shall be first discussed with the reviewer, supervisor, and employee. This discussion shall be noted in the comments section of the Report. The appointing authority shall initial any changes made to the Report.~~
- F. ~~The supervisor shall give employee a copy of the completed Report signed by the supervisor, employee, reviewer, and appointing authority.~~

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~~G. The original Employee Performance Report shall be retained in the Fire Rescue Department Human Resources Division.~~

~~H. A copy of the first page of the Employee Performance Report and the Overall Job Performance page shall be sent by Fire Rescue Department Human Resources Division to the Personnel Department no later than 15 days after the end of the rating period. Do not send the Performance Plan or the Performance Development pages to the Personnel Department.~~

~~I. In addition to the official appeal rights described in Section IX, an employee may attach to the completed report written comments regarding his or her performance evaluation. The supervisor and reviewer must review these comments, initial and date them to indicate that they have been considered, and respond to them in writing if they feel it is appropriate. The employee should be given a copy of any written responses prepared by the supervisor and reviewer.~~

~~IX. REPRESENTATION AND APPEAL RIGHTS~~

~~A. Representation Rights~~

~~1. In the case of an "Unsatisfactory" or "Below Standard" overall performance evaluation rating, the employee may request representation as outlined below.~~

~~a. Employees in classes (jobs) in representation units which are covered by a current ratified memorandum of understanding shall be entitled to notice, representation, and appeal rights and procedures as provided therein.~~

~~b. The provisions of the following employee representation policy apply to employees in all classes (jobs) which are not in a representation unit and all classes (jobs) in representation units which are not covered by a current ratified memorandum of understanding.~~

~~(1) An employee may request representation, not to exceed one City employee and one non-City employee to be present during the discussion of an "Unsatisfactory" or "Below Standard" overall performance evaluation rating which is to be made part of the employee's permanent record and/or which may be used as a basis for subsequent discipline.~~

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~~(2) The “City employee representative” may not be an employee subject to the same investigation or fact finding.~~

~~2. In all other instances, supervisors have the right to counsel employees as they deem appropriate without employee representation being present.~~

~~B. Appeal Rights~~

~~1. Employees may appeal performance evaluations with an overall rating of “Unsatisfactory” or “Below Standard”. In such cases, the supervisor shall explain the employee’s appeal rights.~~

~~a. The employee may appeal the evaluation, for cause, to the Department Head, by submitting an appeal letter, within 10 working days of being notified of any such evaluation.~~

~~b. The appeal letter must contain pertinent details of the basis for the appeal.~~

~~c. As soon as possible after receiving the appeal letter, which becomes an attachment to the evaluation in question, the Department Head or designee will schedule a hearing on the matter.~~

~~d. The employee is entitled to representation rights at such a hearing as specified.~~

~~e. After the hearing, the Department Head or designee will make a final decision as to whether the evaluation will be retained in or removed from the employee’s record.~~

~~2. Employees may not appeal performance evaluations with an overall rating of “Satisfactory” or better. However, employees may attach rebuttal information to the evaluation if they disagree with any part of the evaluation.~~

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~~Reviews of satisfactory or above evaluations are discussion items which may result in changes being made to the evaluation, but are not to be considered an appeal of the evaluation.~~

- ~~3. Appeals which are not resolved by the department may be appealed by the employee to the Personnel Director only when the employee alleges that:
 - ~~a. the Performance Plan was not discussed with the employee when the employee first began a job or when the Plan was revised due to changes in the job, or~~
 - ~~b. the employee was not rated by the first line (immediate) supervisor, or~~
 - ~~c. the Employee Performance Report was not discussed with the employee, or~~
 - ~~d. ratings were changed without the employee's knowledge.~~~~
- ~~4. If an appeal is accepted, the Personnel Director will investigate the facts and consult with all concerned before a change, if any, is made in the evaluation.~~

SAN DIEGO FIRE-RESCUE DEPARTMENT

EMPLOYEE PERFORMANCE REVIEW

FIREFIGHTER – OPERATIONS

EMPLOYEE NAME _____
LAST FIRST M.I.

EMPLOYEE PERNR _____
EMPLOYEE ID#

REPORTING PERIOD Click here to enter a date. TO Click here to enter a date.

Select One: PERMANENT EMPLOYEE PROBATIONARY EMPLOYEE

Select One: ANNUAL REVIEW SUPPLEMENTAL REVIEW

ATTACHED ADDENDUMS

- | | | |
|---|--|---|
| <input type="checkbox"/> Allied Equipment | <input type="checkbox"/> Battalion Medical Officer | <input type="checkbox"/> Self Contained Breathing Apparatus |
| <input type="checkbox"/> Hazardous Incident Response Team | <input type="checkbox"/> Hose Department | <input type="checkbox"/> Paramedic |
| <input type="checkbox"/> Pump Testing | <input type="checkbox"/> Other: _____ | |

PERFORMANCE PLAN

(MUST BE SIGNED UPON INITIAL DISCUSSION AND INITIAL EACH PAGE)

EMPLOYEE: _____
THIS PLAN HAS BEEN DISCUSSED WITH ME DATE

SUPERVISOR: _____
FIRST LEVEL SUPERVISOR DATE

REVIEWED BY: _____
SECOND LEVEL SUPERVISOR DATE

PERFORMANCE EVALUATION

(MUST BE SIGNED AT TIME OF EVALUATION AND INITIAL EACH PAGE)

THIS PLAN HAS BEEN DISCUSSED WITH ME. I (CONCUR ___ DO NOT CONCUR ___) WITH THIS EVALUATION.

EMPLOYEE _____
THIS PLAN HAS BEEN DISCUSSED WITH ME DATE

SUPERVISOR _____
FIRST LEVEL SUPERVISOR DATE

REVIEWED BY: _____
SECOND LEVEL SUPERVISOR DATE

NOTE TO EMPLOYEE: If you desire, you may attach UP TO ONE PAGE of your comments regarding this evaluation. These comments do not constitute an appeal of your evaluation. If you have written comments to be attached, please initial here. _____

OVERALL JOB PERFORMANCE

- | | | | | |
|--|--|--|---|---|
| <input type="checkbox"/> OUTSTANDING PERFORMANCE | <input type="checkbox"/> ABOVE STANDARD | <input type="checkbox"/> SATISFACTORY | <input type="checkbox"/> NEEDS IMPROVEMENT | <input type="checkbox"/> UNSATISFACTORY |
| PERFORMANCE CONSISTENTLY EXCELS IN ALL AREAS. | PERFORMANCE CONSISTENTLY EXCEEDS THE STANDARDS REQUIRED. | ACHIEVES PERFORMANCE STANDARDS THROUGH DEMONSTRATED APPLICATION OF SKILLS. | IMPROVEMENT REQUIRED. PERFORMANCE IS LESS THAN THAT EXPECTED OF A COMPETENT EMPLOYEE. | PERFORMANCE IS INADEQUATE AND FAILS TO MEET REQUIRED STANDARDS. |

| | | | | | |
|-------------|----------------|--------------|-------------------|----------------|---|
| OUTSTANDING | ABOVE STANDARD | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY | <h1 style="margin: 0;">FIREFIGHTER</h1> <h2 style="margin: 0;">OPERATIONS DIVISION</h2> |
|-------------|----------------|--------------|-------------------|----------------|---|

DIRECTIONS: PLACE AN (X) IN THE CATEGORY THAT BEST REPRESENTS YOUR RATING OF THE EMPLOYEE.

OBSERVES CITY AND DEPARTMENT RULES, REGULATIONS AND POLICIES

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| <input type="checkbox"/> | 1. Maintains general knowledge of City and Department Rules, Regulations, and Policies. |
| <input type="checkbox"/> | 2. Leaves of Absence/Tardiness. |
| <input type="checkbox"/> | 3. Uniforms/Grooming. |
| <input type="checkbox"/> | 4. Maintains required Certifications and Licenses. (California Driver's License; EMT-D; advanced training card). |

EQUAL EMPLOYMENT OPPORTUNITY POLICY

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|----------------------------|
| <input type="checkbox"/> | 5. Understands EEO policy. |
| <input type="checkbox"/> | 6. Adheres to EEO Policy. |

FIRE/RESCUE EMERGENCY SCENE OPERATIONS

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 7. Understands and follows orders. |
| <input type="checkbox"/> | 8. Safety. |
| <input type="checkbox"/> | 9. Can locate and operate equipment. |
| <input type="checkbox"/> | 10. Firefighting techniques (search/rescue; hose lays; salvage; overhaul; etc.) |
| <input type="checkbox"/> | 11. Cooperation and teamwork. |
| <input type="checkbox"/> | 12. Initiative/effort/judgment. |
| <input type="checkbox"/> | 13. Maintains composure. |

MEDICAL EMERGENCY SCENE OPERATIONS

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 14. Patient assessment and treatment. |
| <input type="checkbox"/> | 15. Maintains composure. |
| <input type="checkbox"/> | 16. Professional demeanor. |
| <input type="checkbox"/> | 17. Cooperation and teamwork. |
| <input type="checkbox"/> | 18. Knowledge of primary routes of response to hospitals. |
| <input type="checkbox"/> | 19. Adheres to Medical Aid Safety. |

TRAINING

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 20. Practices proper safety techniques. |
| <input type="checkbox"/> | 21. Interest/motivation/participation. |
| <input type="checkbox"/> | 22. Willingness/ability to train others. |
| <input type="checkbox"/> | 23. Timed evolutions (BA; High Rise Rescue Pack). |
| <input type="checkbox"/> | 24. Individual performance rating during company evaluations. |

| | |
|-------------------------------|---------------|
| _____ Employee Initials | _____ Date |
|-------------------------------|---------------|

| | |
|---------------------------------|---------------|
| _____ Supervisor Initials | _____ Date |
|---------------------------------|---------------|

| | | | | | |
|--|----------------|--------------|-------------------|----------------|---|
| OUTSTANDING | ABOVE STANDARD | SATISFACTORY | NEEDS IMPROVEMENT | UNSATISFACTORY | <h1 style="margin: 0;">FIREFIGHTER</h1> <h2 style="margin: 0;">OPERATIONS DIVISION</h2> |
| DIRECTIONS: PLACE AN (X) IN THE CATEGORY THAT BEST REPRESENTS YOUR RATING OF THE EMPLOYEE. | | | | | |

INSPECTIONS (FCIP, CEDMAT, PRE-FIRE, COMPLAINTS)

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 25. Knowledge of codes. |
| <input type="checkbox"/> | 26. Demeanor towards public (courteous, helpful, tactful) |
| <input type="checkbox"/> | 27. Documentation (thorough, accurate, neat). |

STATION AND EQUIPMENT MAINTENANCE

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 28. Planning/organization of work. |
| <input type="checkbox"/> | 29. Timely completion of apparatus and equipment maintenance. |
| <input type="checkbox"/> | 30. Willingness/initiative. |

INTERPERSONAL SKILLS

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---------------------------|
| <input type="checkbox"/> | 31. Teamwork. |
| <input type="checkbox"/> | 32. Respect for others. |
| <input type="checkbox"/> | 33. Professionalism/tact. |

PUBLIC RELATIONS

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 34. Interaction with other departments or agencies. |
| <input type="checkbox"/> | 35. Demeanor towards public (willing, polite, helpful). |

PHYSICAL FITNESS ACTIVITIES (Personal & Battalion)

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|---|
| <input type="checkbox"/> | 36. Daily participation/appropriate activities. |
| <input type="checkbox"/> | 37. Correct uniform. |

WELLNESS AND PHYSICAL ABILITIES TEST

| | | | | | |
|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--|
| | | | | | 38. Wellness <input type="checkbox"/> (Participated in Wellness Exam Program) |
| | | | | | 39. Physical Fitness Testing <input type="checkbox"/> (Participated in Physical Fitness Testing) |
| <input type="checkbox"/> | 40. Annual Physical Abilities Test (Pass time is 6 min. 15 sec.) |
| | | | | | Employee Time |
| | | | | | <input type="checkbox"/> Pass <input type="checkbox"/> Fail |
| | | Minutes | Seconds | | |

| | |
|----------------------------|---------------|
| _____ Employee Initials | _____ Date |
|----------------------------|---------------|

| | |
|------------------------------|---------------|
| _____ Supervisor Initials | _____ Date |
|------------------------------|---------------|

SAN DIEGO FIRE DEPARTMENT
EMPLOYEE PERFORMANCE REVIEW PROGRAM

SUPERVISORS COMMENTS

EMPLOYEE NAME (LAST, FIRST, M.I.)

FIREFIGHTER

CLASSIFICATION

Comments written in support of this evaluation must be sufficient to justify the ratings, and, at a minimum, should fill the shaded area below. Specific examples are required to justify/explain any rating other than "Satisfactory."

SUPERVISOR SIGNATURE

DATE

EMPLOYEE SIGNATURE

DATE

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July 1, 2026

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EMPLOYEE PERFORMANCE REVIEW PROGRAM
AFSCME Local 127, Police Officers Association, Municipal Employees Association, and
Teamsters Local 944 986, IAFF Local 145 and Classified Unrepresented

Note: This policy applies to *Classified Unrepresented employees and* employees represented by AFSCME Local 127, Police Officers Association, the Municipal Employees Association, ~~and Teamsters Local 944 986, and IAFF Local 145.~~ For the employee performance review program for Employees represented by IAFF Local 145 see ~~Personnel Manual Section G-7.~~

I. AUTHORITY:

- A. City Charter Section 127. STANDARDS OF EFFICIENCY.
- B. Civil Service Rule XII. EFFICIENCY.
- C. Civil Service Rule V, Section 6. RE-EMPLOYMENT LISTS FOR REGULAR WORK.

II. POLICY:

- A. The Performance Review Program consists of the following elements:
 - 1. A Performance Plan that describes the functions and performance standards of an employee's job (Discussed in Section III).
 - 2. An Employee Performance Evaluation that provides the employee and the supervisor an opportunity to discuss the employee's performance in relation to the Performance Plan (Discussed in Section IV).
 - 3. A Career Enhancement Plan to guide, train, and develop employees (Discussed in Section V).
- B. The Performance Review Program is intended to enhance communication between the supervisor and the employee and is not intended to be used as the basis to either reward or discipline the employee. The policy on recognizing and documenting exceptionally good or poor performance may be found in Section VI.

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- C. Employees should receive regular and on going feedback from their supervisors so that nothing in the formal Employee Performance Evaluation comes as a surprise.
- D. The Performance Review Program is a tool used by supervisors to:
 - 1. Formally inform employees about their functions and the standards by which they will be evaluated,
 - 2. Evaluate employees' actual performance in relation to the functions and performance standards outlined in the employee's Performance Plan in a fair, consistent, and objective manner,
 - 3. Provide a basis for discussion with employees about their performance.
- E. The Performance Review Program shall be used to evaluate the performance of all classified employees (permanent, probationary, seasonal, and limited).
- F. Employee Performance Evaluations shall be completed:
 - 1. At three-month intervals for probationary employees and for limited employees during the first year of employment in a classification.
 - 2. Prior to the completion of 60 days of active duty in the case of an appointment from a re-employment list of an eligible with permanent status in the class (job) or subdivision thereof, to a department or major division in which the eligible has never worked as a permanent employee for more than 60 days.
 - 3. At one-year intervals for permanent employees and for limited employees following the first year of employment in a classification.
 - 4. At the end of the season for seasonal employees.

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5. Exception: If an employee is on a Supplemental Performance Report (Section VI, D) when the Employee Performance Evaluation becomes due, it will be postponed until the employee is taken off supplemental performance.
 - G. Performance evaluations will normally be given to the employee within 14 calendar days after the close of the evaluation period.
 - H. Employees will be informed when approval has been granted to give a performance report later than 30 working days after the close of the evaluation period.
 - I. The evaluation period for an Employee Performance Evaluation shall not exceed twelve months.
 - J. An employee approaching the end of the probationary period should not be retained if there is doubt as to the employee's ability and/or willingness to perform satisfactorily.
- III. THE PERFORMANCE PLAN:
- A. Purpose
 1. The Employee Performance Plan describes the job and defines the performance requirements of that job so that employees know what they are supposed to do and how they are supposed to do it. (See the Employee Performance Plan, attached)
 2. The documentation and discussion of essential job functions and required performance standards facilitates the evaluation process for employees and supervisors.
 3. The discussion of the plan provides employees information on how to maximize their performance.

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- B. Procedure
1. It is the supervisor's responsibility to ensure that a Performance Plan is developed for each position under his or her supervision.
 2. The development of the Performance Plan should begin with a thorough analysis of the major functions (responsibilities) of the position.
 - a. Each function should describe a major part of the job.
 - b. Record the major functions at the top of the Performance Plan pages, one per page.
 3. For each function listed on the Performance Plan, the supervisor should determine what standards are required for proper and satisfactory performance.
 - a. Performance standards should describe the major activities required to perform the function and indicate how much, in what time, how well, and/or in what manner the particular activities are to be done.
 - b. Record the appropriate performance standards below each function on the Performance Plan pages.
 4. Once the Performance Plan has been developed, the supervisor shall discuss it with the reviewer, a next level or higher supervisor. The reviewer should verify that the Plan accurately reflects the duties of the position to be rated.
 5. The supervisor shall then discuss the Plan with the employee. This discussion and introduction of the Performance Plan to the employee is to take place when the employee first begins a job, or when the duties of a job change and it is necessary to revise an existing plan.

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A discussion of the Performance Plan should also take place when the employee is assigned a new, permanent supervisor. These early discussions inform the employee of the job requirements before the formal evaluation takes place.

6. The supervisor, reviewer, and employee shall sign the first page of the Employee Performance Plan to verify the preparation, review, and discussion of the Performance Plan when it is first introduced to an employee starting a new job or when an existing plan is revised. The employee shall also sign each of the Performance Plan pages in the lower left-hand corner to verify discussion of each function and its standards.
7. The employee shall receive a completed copy of the Performance Plan.
8. The supervisor and employee should regard the Performance Plan as a changeable and flexible record.
 - a. If the performance standards are inappropriate or significant changes in job functions occur, the supervisor should reevaluate and modify the Performance Plan to reflect this information. Changes made to the Performance Plan should be discussed with the employee, and the employee should be given a copy of the modified Plan. The employee should also sign any changed or new pages of the Performance Plan in the lower left-hand corner.
 - b. The supervisor should review the Performance Plan with the employee after each evaluation period and update it as necessary. This systematic review ensures that the employee's functions and performance standards reflect current job requirements.

IV. PERFORMANCE EVALUATIONS

- A. The employee's Performance Evaluation will take place as a discussion between the employee and the immediate supervisor. This meeting is informal and is designed to foster dialogue between both parties. (See the Supervisor-Employee Conference form, attached).

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- B. Employee performance shall be evaluated in relation to the job-related criteria indicated on the Performance Plan.
- C. Employee performance shall be rated by the employee's immediate supervisor.
 - 1. If the immediate supervisor is new, the Appointing Authority may delegate the evaluation to the former supervisor or the next level supervisor if they are more familiar with the employee's performance.
 - 2. If the immediate supervisor is unavailable to give the performance evaluation when it is due, it will be given by the next level supervisor, not an OCA supervisor.
- D. Supervisors should continually monitor and document employee performance throughout the evaluation period to provide a proper basis for the subsequent evaluations made.
- E. Employees on light duty assignments shall still be evaluated. Light duty assignments will not interrupt or suspend the normal evaluation period for Employee Performance Evaluations. The usual performance standards shall be utilized for the time period that the employee was performing the full range of duties. For the period of time during which the employee is on light duty, the evaluation will cover the performance of the employee while on light duty.
- F. Supervisor-Reviewer Conference
 - 1. The supervisor shall discuss the evaluation with the reviewer, a next level or higher supervisor, prior to meeting with the employee. Suggestions from the reviewer should be considered by the supervisor.
 - 2. Unresolved differences between the judgments of the supervisor and the reviewer shall be decided by the Appointing Authority.

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G. Supervisor-Employee Conference

1. The supervisor and the employee shall review and discuss the Employee Performance Evaluation in private. In appropriate circumstances, this conference may also be attended by employee and/or management representatives, unless objected to by either party.
2. The supervisor and the employee should constructively discuss all evaluations of the functions, standards, overall job performance.
3. The supervisor should point out the employee's general progress in performing job functions and meeting performance standards; outstanding achievements; areas in which improvement is necessary; as well as any other performance information considered to be important.
4. The Supervisor will complete an Overall Job Performance form, documenting the employee's performance (e.g., exceptional performance, achievements, improved performance, needed improvements) during the evaluation rating period. (See Overall Performance form).
5. The employee should be given an opportunity to discuss the evaluation and present information which might change it.
6. The supervisor and the employee should also discuss the content of the performance plan and performance expectations for the next evaluation period.

H. Processing Completed Evaluations

1. After the conference, the supervisor and the employee shall sign the Supervisor-Employee Conference form and the Overall Job Performance form. These signatures indicate only that they have discussed the evaluation, not that the employee agrees with it. If the employee chooses not to sign, the supervisor shall initial and make a note to that effect in the spaces provided for the employee's signature.

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2. The Supervisor-Employee Conference form and Overall Job Performance form will then be routed to the reviewer and the appointing authority to confirm that the discussion took place.
 3. The supervisor shall give the employee a copy of the completed forms signed by the supervisor, employee, reviewer, and appointing authority.
 4. The original Supervisor-Employee Conference form and the Overall Job Performance form shall be retained in the files of the department or major division.
 5. A copy of the Supervisor-Employee Conference form and the Overall Job Performance form shall be sent to the Personnel Department no later than 15 days after the end of the rating period.
- I. An Employee Performance Evaluation shall not be given to an employee later than 30 working days after the close of the evaluation period without the prior approval of the Mayor's Office or non-mayoral Department Head. Approval is required for the presentation of the performance report more than 30 working days after the due date, not for the content of the report. Failure to obtain such prior approval gives rise to a grievance which MEA, POA, AFSCME Local 127, ~~or~~ Teamsters Local ~~94~~ 986, ***IAFF Local 145 and Classified Unrepresented employees*** may present directly to the Mayor's Office or to the non-mayoral Department Head.
 - J. Employees will be informed when approval has been granted to give a performance report later than 30 working days after the close of the evaluation period. The evaluation period for the Employee Performance Evaluation shall not exceed twelve (12) months. Employees will not be retroactively evaluated beyond a 12 month period.

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V. CAREER ENHANCEMENT PLAN

- A. The Career Enhancement Plan is an optional tool available to supervisors to guide, train and develop employees. It may be used to assist employees meeting performance standards, to improve their performance even more and to enhance their career opportunities. Use of this plan is recommended when the employee is seeking guidance on how to improve his or her opportunities and should be developed as a cooperative effort to best achieve the employee's goals. (See Career Enhancement form, attached).
- B. Procedure
1. The supervisor should consider the overall level of development and progress of an employee in his or her job or career ladder.
 2. The supervisor should discuss the employee's interests and goals for growth and development with him or her.
 3. Suggested areas for an employee's development should be recorded in the Performance Description section of the Career Enhancement Plan.
 4. Suggested activities and actions that may be taken by the supervisor and/or employee to assist in his or her growth and development should be recorded in the Career Development Plan section of the form.

VI. DOCUMENTING EXCEPTIONALLY GOOD OR POOR PERFORMANCE

- A. In cases of exceptionally good or poor performance, it may be necessary or desirable to document the employee's actual performance level in order to support a reward or disciplinary action. Such documentation should be made and given to the employee at the time of occurrence, not saved up until the employee's evaluation is due.

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- B. Exceptionally good performance may be recognized in variety of ways. These include, letters of commendation, discretionary days off, Extra Merit increases, bonuses, certificates, and other forms of employee recognition that may be established either city-wide or in each department. In addition, the Commendation form (attached) may also be used.
- C. Exceptionally poor performance should be brought to the attention of the employee as soon as it is discovered so that the employee can immediately work on improving. The supervisor should provide guidance and assistance on how to improve so as to allow the employee an opportunity to raise his or her performance level. Appropriate methods of addressing poor performance include, oral counseling, written counseling, supplemental performance reports, reduction in compensation, demotion, and termination. The Performance Development Plan is discussed below. Additional information on each of these is available from the City's Dimensions in Discipline program or your assigned Personnel Liaison Analyst.
- D. Supplemental Performance Reports (See the Supplemental Performance Report form, attached).
 - 1. Purpose
 - a. Supplemental Performance Reports provide supervisors with a tool to notify employees about poor performance and to make an official record of such poor performance. Employees put on a Supplemental Performance Report are expected to improve to an acceptable level of performance within a reasonable period of time (generally 90 days or less).

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- b. A Supplemental Performance Report may also be completed by supervisors as a follow-up review of a previous Supplemental Performance Report.
 - (1) If the employee's performance has improved to an acceptable level, a final Supplemental Performance Report and Overall Job Performance form should be used to document the improvement and take the employee off supplemental performance.

Note: If the employee's regular Employee Performance Evaluation was postponed as a result of being on the Supplemental Performance Report, the Supervisor-Employee Conference should be held in conjunction with the discussion taking the employee off the supplemental. The purpose of this conference is to give the employee feedback on all of the functions in the Performance Plan, not just those that were the subject of the supplemental. As with the regular Supervisor-Employee Conference the employee's performance on these other functions is not documented and the regular review date is not changed.

- (2) If the employee's performance has not improved to an acceptable level within the time allotted in the original Supplemental Performance Report, additional Supplemental Performance Reports may be issued if the supervisor has reason to believe the performance will improve with additional time.

2. Procedure

- a. The procedures to complete and process a Supplemental Performance Report are the same as for a regular Employee Performance Evaluation, except that the Supplemental Employee Performance Report form is used instead of the Supervisor-Employee Conference form to document the report.

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- b. Supplemental Employee Performance Reports shall include written comments which explain fully the reasons for the poor performance evaluation.
3. Performance Development Plan (See the Performance Development Plan form, attached.)
 - a. The Performance Development Plan is a tool which must be used by supervisors to assist employees who have received a Supplemental Employee Performance Report to improve their performance to an acceptable level.
 - b. Procedure - The supervisor should:
 - (1) Review the employee's Performance Plan to identify specific areas requiring improvement.
 - (2) Attempt to determine the causes of performance problems in order to develop appropriate Development Plans.
 - (3) Record plans to improve performance in the Performance Development Plan section. Typical activities that might be recommended include special assignments and remedial training; job-related college or training classes; and counseling to improve attitude and/or interpersonal skills.
 - (4) When discussing the Performance Development Plan with the employee, the supervisor should inform the employee that performance will be reviewed within an established time period which is indicated in writing on the Plan.

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- (5) At the end of the designated time period, the supervisor should complete the Follow-up Review section of the Performance Development Plan by recording what actions have been taken to improve performance and how performance has changed, where applicable. If the supervisor used a Supplemental Performance Report to document a follow-up review, this section of the Performance Development Plan should reference the Supplemental Performance Report.
- (6) The supervisor should first discuss the Follow-up Review with the reviewer and then with the employee.
- (7) The supervisor, reviewer, and employee shall sign the Follow-up Review to verify discussion of the evaluation.
- (8) The original signed copy of the Performance Development Plan should be retained in the files of the department or division, and the employee should be given a copy of the complete form.

VII. REPRESENTATION AND APPEAL RIGHTS

A. Representation Rights

1. In the case of a Supplemental Performance Report, the employee may request representation as outlined below.
 - a. Employees in classes (jobs) in representation units which are covered by a current ratified memorandum of understanding shall be entitled to notice, representation, and appeal rights and procedures as provided therein.

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- b. If it is determined that an employee will be issued a Supplemental Performance Report, the employee shall be provided reasonable advance notice for the purpose of obtaining representation. However, this shall not be construed so as to require management to delay issuance of a Supplemental Performance Report past an employee's probation period or transfer trial period end date.
 - c. The provisions of the following employee representation policy apply to employees in all classes (jobs) which are not in a representation unit and all classes (jobs) in representation units which are not covered by a current ratified memorandum of understanding.
 - (1) An employee may request representation, not to exceed one City employee and one non-City employee to be present during the discussion of a Supplemental Performance Report which is to be made part of the employee's permanent record and/or which may be used as a basis for subsequent discipline.
 - (2) The "City employee representative" may not be an employee subject to the same investigation or fact finding.
 - 2. In all other instances, supervisors have the right to counsel employees as they deem appropriate without employee representation being present.
- B. Appeal Rights
- 1. Employees may appeal Supplemental Performance Reports. In such cases the supervisor shall explain the employee's appeal rights.
 - a. The employee may appeal the evaluation, for cause, to the Department Head, by submitting an appeal letter, within 10 working days of receipt of any such evaluation.
 - b. The appeal letter must contain pertinent details of the basis for the appeal.

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- c. As soon as possible after receiving the appeal letter, which becomes an attachment to the Supplemental Performance Report in question, the Department Head or designee will schedule a hearing on the matter.
 - d. The employee is entitled to representation rights at such a hearing as specified.
 - e. After the hearing, the Department Head or designee will make a final decision as to whether the Supplemental Performance Report will be retained in, modified, or removed from the employee's record. This decision must be provided in writing within 10 working days.
 - f. Current Memorandums of Understanding may provide additional or different appeal rights.
2. Employees may not appeal evaluations received during Supervisor-Employee Conferences. When employees have concerns about evaluations other than Supplemental Performance Reports, the Department Head should designate someone, other than the rater or reviewer, to meet with the employee and his or her representative in an attempt to resolve any differences or dissatisfaction. These reviews may result in changes being made to the evaluation, but are not to be considered an appeal of the evaluation. In addition, employees may attach rebuttal information to the evaluation if they disagree with any part of the evaluation.
 3. Appeals which are not resolved by the department may be appealed by the employee to the Personnel Director only when the employee alleges that:
 - a. the Performance Plan was not discussed with the employee when the employee first began a job or when the Plan was revised due to changes in the job, or
 - b. the employee was not rated by the first-line (immediate) supervisor, or

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- c. the Employee Performance Evaluation was not discussed with the employee, or
 - d. the evaluation was changed without the employee's knowledge.
4. If an appeal is accepted, the Personnel Director will investigate the facts and consult with all concerned before a change, if any, is made in the evaluation.



THE CITY OF SAN DIEGO

M E M O R A N D U M

DATE: February 27, 2026
TO: Civil Service Commission
FROM: David Dalager, Personnel Director
SUBJECT: Request from Vice President Moore for a Report from the Personnel Director

This is an information item only. Staff will report on current and future plans for improvement of personnel processes.

A handwritten signature in blue ink, appearing to read "David Dalager".

David Dalager
Personnel Director

DD:SO:sm

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