

## 2022 Performance Review Timeline

Performance year: January 2022 through December 2022. Provide copies to Charleen Jacobs, Board Chair, Jackie Flowers.

Complete By:	Task	Who	Staff Assignment	Notes
10/4/2022	Meet with Board Chair to discuss process, timeline, process and forms in preparation for Year end 2021 review and mid-year 2022 check in schedule.	Human Resources	Cheryl Bidleman	
10/12/22	Present timeline, process and forms to full Board	Human Resources	Cheryl Bidleman	<b>Study session</b> presentation
November	Talk with the Mayor about the process, timeline and form	Board Chair Utilities Director		Recommended
November, 11/2/22	Director updates workplan, completes self-evaluation and sends to Human Resources	Utilities Director		Note: This review is a full review. TPU Superintendents provide information about progress on Strategic Directives.
November, 11/9/22	Human Resources provides to Board Members: -2022 Review Timeline -Performance Review Form -Director's updated work plan -Director's Self-Evaluation	Board Chair	Cheryl Bidleman  Charleen Jacobs distributes to Board Members	Charleen send reminders to Board to complete evaluation in preparation for 12/15 session.
Only Board Meeting in November, 11/16	Present Self-Evaluation	Utilities Director	None	<b>Executive session</b> 60 minutes
Only Board Meeting in December, 12/14	Discuss Director performance (Staff assists if preferred, Director not present)	Board Chair	Cheryl Bidleman	<b>Executive session</b> 60 minutes Result: draft review
December, 12/29	Update draft Performance Review form considering feedback from 12/14 (Staff assists if preferred)	Board Chair	Cheryl Bidleman	
January, 1/11/23	Sends draft review form to Board	Board Chair	Charleen Jacobs	
January, 1/11/23	Research compensation	Human Resources	Cheryl Bidleman Kari Louie	
Second Board meeting in January, 1/25/23	Discuss Director's performance (review draft performance review form) (Staff assists if preferred, Director not present)	Board	Cheryl Bidleman	<b>Executive session</b> 60 minutes

<b>Complete By:</b>	<b>Task</b>	<b>Who</b>	<b>Staff Assignment</b>	<b>Notes</b>
First Board meeting in February, 2/8/23	Reviews and edits the performance review form. Distribute final draft review form to Board	Board Chair	Charleen Jacobs	
February, before 2/22	Motion prepared and submitted in preparation for March Meeting	TPU Chief Deputy City Attorney	Tom Morrill	Send to Charleen Jacobs
February, before 2/22	Consider compensation, request consultation with Class & Comp, Kari Louie	Board Chair	Cheryl Bidleman Kari Louie	
February, before 2/22	Distribute final draft review document to Director	Board Chair	Human Resources	
February, before 2/22	Discuss review with the Mayor	Board Chair	None	
Second Board Meeting in February, 2/22	Deliver performance review (Director present, staff not present unless requested. May request Asst HR Director of Comp & Benefits)	Board Chair	TPU Chief Deputy City Attorney, Kari Louie	<b>Executive session</b> 60 minutes
First Board Meeting in March, 3/8/23	Board votes on performance review	Board	TPU Chief Deputy City Attorney	<b>Regular meeting</b>
Immediately after review is conducted	Review communicated	Communications Team (at direction of Board Chair)	Public Affairs and Communication	
After the Board vote	Update documentation and any changes for employee file	TPU Chief Deputy City Attorney	Cheryl Bidleman	Send document to HR TMB
<b>Mid-year Check-in (Confirmation Year Only) NOT REQUIRED TO BE MID YEAR. CAN OCCUR IMMEDIATELY FOLLOWING YEAR END REVIEW</b>				
April 2023	Contact Board Chair to confirm process, timeline, and form	Human Resources	Cheryl Bidleman	Mini Review, use the Check-in template
April	Contact City Attorney and Chief Deputy City Attorney (TPU) to review process, timeline, form, and motions	Board Chair	Cheryl Bidleman	
April	Contact City Manager's Executive Assistant to schedule executive session with Council re: performance of a public employee.	Human Resources	Cheryl Bidleman	
First Board meeting in May, 5/10	Distribute template to Director and Board	Board Chair	Cheryl Bidleman	

<b>Complete By:</b>	<b>Task</b>	<b>Who</b>	<b>Staff Assignment</b>	<b>Notes</b>
05/25	Prepare Motion	TPU Chief Deputy City Attorney	Tom Morrill	Send to Charleen Jacobs
Second Board meeting in May, 5/24	Conduct performance check-in (Staff assists if necessary)	Board Chair	Cheryl Bidleman	<b>Executive session</b> 60 minutes
5/31	Board Chair and staff prepare final performance review document	Board Chair	Human Resources	
First Board meeting in June 6/8	Board Chair presents final performance review document. Vote to accept review and reconfirm.	Board Chair		<b>Regular session</b>
After Board vote in June 6/14	Send performance review document to Council Members. <i>CONFIRM EXECUTIVE SESSION DATE?</i>	Board Chair		Council Members do not add their comments or participate in the review process, other than to reconfirm.
<i>TBD if needed</i>	<i>Executive Session of Council?</i>	<i>Board Chair</i> <i>Utilities</i> <i>Director?</i>		<b>Executive Session</b>
6/20 Council Meeting	(Before Board Chair transition) Make presentation to Council requesting reconfirmation	Board Chair		<b>Regular session</b>
After Council vote Must be complete before <b>7/15!</b>	Update documentation for employee file: Offer letter, compensation change (if any), benefits/leave changes (if any)	TPU Chief Deputy City Attorney	Human Resources Talent Services	Send document to HRMS to implement any compensation, benefits, and leave changes.