



TALLAHASSEE POLICE DEPARTMENT GENERAL ORDERS

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|  Proudly Policing Since 1826 | SUBJECT Performance Evaluations and Performance Improvement Plans |  Nationally Accredited 1986 | |
| | CHIEF OF POLICE <i>Signature on File</i> | | |
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AUTHORITY/RELATED REFERENCES

COT Administrative Policy 707, Performance Evaluations
 COT/PBA Agreement, Article 17, Probationary Periods
 COT/PBA Agreement, Article 18, Performance Evaluations/Conditional Status
 General Order 5, Professional Development
 General Order 68, Reserve Police Officer Unit

ACCREDITATION REFERENCES

CALEA Chapter 35
 CFA Chapter 12

KEY WORD INDEX

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|---|--|
| Additional Employee Resources Responsibilities Conditional Status General Information & Responsibilities Performance Evaluation Appeals Performance Evaluation Types & Responsibilities Performance Improvement Plan (PD 261) Performance Improvement Plans Rater & Member Responsibilities Understanding the Rating Scale | Procedure IV Procedure VI Procedure I Procedure VII Procedure II Appendix Two Procedure V Procedure III Appendix One |
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POLICY

The Department is responsible for ensuring member compliance with the City of Tallahassee (COT) performance evaluation system and the Department's performance improvement plan system. Members shall adhere to the protocols outlined in this written directive regarding performance evaluations and performance improvement plans.

TALLAHASSEE POLICE DEPARTMENT

DEFINITIONS

Conditional Status: The COT designation for a situation where a member whose overall work performance has become less than satisfactory (as evidenced by the member's performance evaluation) is re-evaluated to determine their level of improvement, if any, in specific job-related areas.

Performance Improvement Plan (PIP): The Department's strategy employed to improve member work performance in identified job-related areas in an effort to prevent the member from being placed on conditional status.

PROCEDURES

I. GENERAL INFORMATION AND RESPONSIBILITIES

- A. Employee Resources is responsible for facilitating the Department's compliance with COT Administrative Policy 707 (Performance Evaluations) and adherence to the mandates of the COT/PBA Agreement regarding performance evaluations and conditional status.
- B. The Employee Resources Director shall serve as the administrator of the Department's performance evaluation program.
- C. Employee Resources, via the performance evaluation program, is the official repository for all completed end-of-probation and annual evaluations, and evaluations associated with performance improvement plans and conditional status.
- D. The Employee Resources Director is responsible for ensuring all newly promoted supervisors receive training on how to conduct performance evaluations and utilize the performance evaluation program. Such training shall include, at a minimum, the following information:
 1. Performance measurement definitions;
 2. Procedures for use of the forms within the performance evaluation program; and
 3. Responsibilities of the rater (i.e., supervisor completing the evaluation).
- E. As necessary, the Employee Resources Director is responsible for providing performance evaluation refresher training to all supervisors, including changes to COT Administrative Policy 707, the COT/PBA Agreement, or the performance evaluation program.

TALLAHASSEE POLICE DEPARTMENT

- F. Members hired into permanent positions shall have their job performance evaluated by their supervisors utilizing the performance evaluation program:
 - 1. As a prerequisite to completing their probationary period in a new job classification, and
 - 2. At least once annually after completing probation.
- G. The supervisor of an operational or support tier reserve police officer is responsible for completing a written performance evaluation of the member's job performance at least once annually, utilizing the Reserve Officer Evaluation PD 373 form.
- H. Part-time, OPS (other personnel services), and volunteer members are not subject to performance evaluations.
- I. Supervisors are responsible for maintaining information, including, but not limited to, e-mail, notes, report excerpts, and letters concerning the job performance of each member under their command to facilitate accurate and meaningful performance evaluations.
- J. Written performance evaluations for a supervisor must include a rating regarding the quality of the performance evaluations the supervisor provides to members under their command.

II. PERFORMANCE EVALUATION TYPES AND RESPONSIBILITIES

A. Probationary

Although there is no formal written evaluation during a probation period, supervisors who oversee members on probation must meet with them at least quarterly to discuss their current performance and any deficiencies. Throughout the probationary period, the supervisor should keep notes in preparation for the end-of-probation evaluation. The supervisor's chain of command may request additional documentation of the probationary member's performance.

- 1. End-of-Probation Evaluations –
 - a. It is the responsibility of the immediate supervisor to complete an end-of-probation evaluation for each member under their command contemporaneously with the end of the member's probation.

TALLAHASSEE POLICE DEPARTMENT

- b. Probation for sworn members:
- 1) Newly hired entry-level officer: one (1) year from their certification date; however, upon recommendation by their supervisor and approval by the Chief of Police, an officer's probationary period may be extended up to six (6) months.
 - 2) Newly promoted sergeant: one (1) year from their promotion date.
 - 3) Newly promoted lieutenant: six (6) months from their promotion date; however, upon recommendation by their supervisor and approval by the Chief of Police, a lieutenant's probationary period may be extended up to six (6) months.
 - 4) Newly hired or promoted captain, major, deputy chief, assistant chief, or chief of police: six (6) months from their hire or promotion date. Upon the Chief of Police's recommendation, the member's probationary period may be extended up to 90 calendar days in accordance with city policy.
 - 5) Former entry-level sworn members who are rehired into the same position within two (2) years are not required to complete another probationary period if they previously completed it in that position.
- c. Probation for civilian members:
- 1) Newly hired or promoted civilian member: six (6) months from hire or promotion date. Upon the recommendation of their supervisor and the approval by the Chief of Police, a civilian member may have their probationary period extended by up to 90 calendar days in accordance with city policy.
 - 2) Former civilian members who are rehired into a position in their former classification or into a classification in which probation was previously completed are not required to complete an additional probationary period.
- d. Supervisors are responsible for making the needed notifications to their chain of command about the completion of the end-of-probation evaluation so the evaluation can be reviewed by their chain of command up to, and including, the Chief of Police.

TALLAHASSEE POLICE DEPARTMENT

- e. After the approved end-of-probation evaluation is reviewed and signed by the member, Employee Resources will automatically be notified that the evaluation is complete.
2. Upon receipt and review of the end-of-probation evaluation, Employee Resources is responsible for:
 - a. Electronically forwarding a copy to Human Resources and Workforce Development, and
 - b. Filing a copy in the member's personnel file.
3. It is the responsibility of Employee Resources to initiate the change of a member's status from probationary to permanent by completing and forwarding a COT Personnel Action Form to Human Resources and Workforce Development.

B. Annual

1. The annual performance evaluation cycle is August 1 through July 31.
2. It is the responsibility of Employee Resources to liaise between Human Resources and Workforce Development and Department supervisors to ensure annual evaluations are completed in compliance with COT protocols and timeframes.
3. Employee Resources is responsible for forwarding all pertinent information for completing the annual evaluations to each Department supervisor.
4. It is the responsibility of supervisors to electronically sign the evaluation form, and ensure their chain of command electronically signs the form to comply with the COT policy and the COT/PBA Agreement that annual evaluations of all members be signed by the rater's rater or Bureau Commander, whichever is the higher-ranking member.

III. RATER AND MEMBER RESPONSIBILITIES

- A. During the evaluation process, each member and their supervisor shall discuss the member's expected level of performance, rating criteria, and goals for the new reporting period. Also see the Performance Management Protocols outlined in General Order 5 (Professional Development).

TALLAHASSEE POLICE DEPARTMENT

- B. Supervisors conducting performance evaluations are responsible for:
1. Completing the evaluation process as directed by Employee Resources, COT protocols, and applicable training, to include adherence to established timeframes,
 2. Utilizing the proper employee evaluation form for the member being evaluated, such as end-of-probation or annual evaluations, and ensuring the “review date” and “rating period” dates are correct,
 3. Entering a rating score for each performance category applicable to the member’s job assignment,
 4. Entering comments for all performance-rated categories, but specifically explaining ratings that are unsatisfactory or outstanding.
 5. Discussing the results of the performance evaluation just completed,
 6. Addressing any questions or concerns the member may present, and
 7. Ensuring the evaluation form is electronically signed:
 - a. By the chain of command (indicating their concurrence and approval of the evaluation), and
 - b. By the member (indicating the member received a copy of the evaluation and discussed the evaluation with their supervisor).
- C. Members receiving performance evaluations from their immediate supervisor are responsible for the following:
1. Participating in performance evaluation meetings, and
 2. If desired or as warranted, enter comments in the designated areas of the evaluation form. Such comments may include:
 - a. The member’s work performance, desired or requested training, and career-related goals and objectives, and
 - b. A request for additional chain of command review of the performance evaluation (including an official appeal of the evaluation rating).

IV. ADDITIONAL EMPLOYEE RESOURCES RESPONSIBILITIES

In addition to the responsibilities outlined in sections I and II above, the Employee Resources Director or designee is responsible for the following regarding performance evaluations:

- A. Reviewing each performance evaluation to ensure:
 - 1. Eligible members received their evaluation in the timeframe established by Human Resources and Workforce Development, and
 - 2. Each performance evaluation is completed in compliance with COT Administrative Policy 707 and (if applicable) the mandates of the COT/PBA Agreement.
- B. Filing a copy of each evaluation in the member's personnel file, and
- C. Uploading a copy of each evaluation to COT OnBase.
- D. Entering member scores to the Human Resources and Workforce Development database.

V. PERFORMANCE IMPROVEMENT PLANS

- A. Whenever the work performance of a member is not meeting the expectations of the Department (based upon the established criteria of the member's COT job description and/or the performance evaluation program standard established for the member's work assignment), the member is subject to placement on conditional status.
- B. Supervisors of members, as described in subsection A above, are responsible for first implementing a performance improvement plan (PIP) for the member.
 - 1. The PIP will outline the performance objectives and expectations the member must achieve to succeed in the position.
 - 2. The PIP will be documented on a Performance Improvement Plan form (PD 261).
- C. Employee Resources is responsible for advising/assisting supervisors as needed in the implementation of a PIP.
- D. The PIP (and the PD 261) must address the following:

TALLAHASSEE POLICE DEPARTMENT

1. A specific start date and end date for the PIP.
 2. The deficient competencies, such as specific work areas, where improvement is required;
 3. The desired outcome, such as a specific job task or behavior the member must demonstrate to meet Department expectations;
 4. The action plan to improve performance, including specific steps the member must complete to achieve the desired outcome identified above;
 5. The results the supervisor will monitor to determine whether the member is achieving or has achieved the desired outcome; and
 6. The frequency of supervisory monitoring.
- E. The PD 261 must be signed by the initiating supervisor and approved by the Bureau Commander (or higher rank) before discussion with the member.
- F. Once the PIP is approved (and the PD 261 signed), the supervisor shall discuss the PIP with the member to ensure expectations for improvement are clear and understood.
1. The supervisor should use the PD 261 as a reference during the discussion.
 2. The member is required to sign the PD 261 (attesting to receipt of the PD 261 and discussion of the PIP).
- G. After the PIP discussion is complete and the form is signed (and a copy provided to the member), the supervisor is responsible for delivering the signed original PD 261 to Employee Resources.
- H. Employee Resources is responsible for filing the PD 261 in the member's personnel file.
- I. A member may appeal their placement on a Performance Improvement Plan as outlined in COT Administrative Policy 707 or the COT/PBA Agreement.
- J. Supervisors are responsible for the following:

TALLAHASSEE POLICE DEPARTMENT

1. Monitoring and documenting a member's work performance during the PIP,
 2. Providing regular briefings on the progress of the PIP to their chain of command up to and including the Bureau Commander (or higher rank who approved the PIP), and
 3. Meeting with the affected member and discussing the PIP on a regular and consistent basis throughout the PIP timeframe.
 - a. At a minimum, the supervisor shall meet with the member and document the member's work performance in the PD 261 on or about the 30th, 60th, and 90th day of the PIP.
 - b. Supervisors shall only document the member's work performance in the identified performance area(s) of the PIP.
 - c. Supervisors shall add comments to each applicable performance area addressing:
 - 1) The identified deficiencies,
 - 2) The rating the member would be receiving if the evaluation were their annual evaluation,
 - 3) The performance area(s) discussed, and
 - 4) Whether or not the member is improving in the deficient areas.
- K. At the conclusion of the PIP (90th day), the supervisor shall:
1. Sign and request the member to sign the Work Performance Assessment page in the PIP.
 2. Deliver the Work Performance Assessment to Employee Resources.
 3. Provide an end-of-PIP briefing to their chain of command up to and including the Bureau Commander (or higher rank when that person is the member who approved the PIP), and
 4. Complete a numbered memorandum documenting the competencies listed on the PIP, the rating level of each competency (1-5), whether or not the member has met the requirements of each competency, and stating whether the member has successfully completed the PIP. Then have the memorandum signed by their

TALLAHASSEE POLICE DEPARTMENT

supervisor or the Bureau Commander, whichever is the higher-ranking member, and

5. Present and discuss the findings with the member.
 6. The member will sign at the bottom of the numbered memorandum stating they received the outcome of their PIP.
- L. If, after the completion of the PIP, the member's work performance in the identified area(s) *is* rated at least a Level 3, the member will *not* be placed on conditional status.
- M. If, after the completion of the PIP, the member's work performance in the identified area(s) *is not* rated at least a Level 3, the member *will be* placed on conditional status.
- N. The supervisor, based on the determination set forth in subsections L and M above, shall indicate in the numbered memorandum whether or not the member is being placed on conditional status.
- O. Members participating in a PIP are responsible for the following:
1. Participating cooperatively in the PIP meetings and discussions,
 2. Sign the PIP at the beginning, after the 90-day performance assessment, and the numbered memorandum at the completion of the PIP, and
 3. Addressing any questions or concerns with their supervisor in a timely manner.

VI. CONDITIONAL STATUS

- A. A non-probationary member may be placed on conditional status as outlined in COT Administrative Policy 707 or the COT/PBA Agreement.
- B. A member may appeal an evaluation when it places them on conditional status.
- C. Employee Resources is responsible for the following:
1. Completing a Personnel Action Form documenting the placement of the member on conditional status, and forwarding it to Human Resources and Workforce Development,

TALLAHASSEE POLICE DEPARTMENT

2. Notifying their own chain of command when any member is placed on conditional status,
3. Ensuring a copy of all performance evaluations related to the PIP and conditional status is placed in the member's personnel file and forwarded to Human Resources and Workforce Development, and
4. At the end of the conditional status timeframe, ensure a Personnel Action Form is placed in the member's personnel file and forwarded to Human Resources and Workforce Development, indicating the final disposition of the conditional status, either:
 - a. Attainment of permanent status, or
 - b. Separation from COT employment.

VII. PERFORMANCE EVALUATION APPEALS

- A. Members have the right to appeal their performance evaluations.
- B. A member may submit an appeal if they feel their evaluation did not accurately assess their job performance.
- C. The appeal process for civilian members and sworn members, of the rank of Captain or above, is outlined in COT Administrative Policy 707.
- D. The appeal process for bargaining unit members is outlined in Article 18 of the COT/PBA Agreement.
- E. The appeal must be submitted in writing to their immediate supervisor's (the rater's) supervisor.
- F. The appeal must state the specific reason(s) the member disagrees with the rating(s) of their job performance, and what relief is being requested by the member.
- G. Employee Resources is responsible for ensuring:
 1. The member meets with their rater's supervisor and receives a written response within the time limits stated in COT policy or the COT/PBA Agreement,
 2. A copy of the appeal and the response is included in the member's personnel file if changes are not granted from the appeal, and

TALLAHASSEE POLICE DEPARTMENT

3. If the member's appeal results in changes to the performance evaluation, the amended evaluation replaces the original evaluation previously included in the member's file, and a copy is forwarded to Human Resources and Workforce Development. A copy of the appeal and response is electronically filed with Employee Resources, but not in the employee's official employment file.

TALLAHASSEE POLICE DEPARTMENT

GENERAL ORDER 84 – PERFORMANCE EVALUATIONS/PIP
APPENDIX ONE

UNDERSTANDING THE RATING SCALE

I. GENERAL INFORMATION

- A. The criteria used for performance evaluations are specific to the member's assignment category of Supervisor, Sworn Member, or Support Member during the rating period.
- B. The basic premise of the rating process is that the member is expected to at least meet expectations to demonstrate the agreed-upon standard, value, or competency.
- C. For the employee to be adequately evaluated, the member must have:
 - 1. Received appropriate/required training,
 - 2. The necessary resources, equipment, and supplies,
 - 3. Participated in setting expectations, and
 - 4. Had the opportunity to demonstrate the standard or competency.

II. RATING SCALE

- A. Level 1
Employee rarely demonstrates agreed-upon standard, value, or competency.
- B. Level 2
Employee periodically demonstrates agreed-upon standard, value, or competency, but needs to perform at this level more consistently.
- C. Level 3
Employee consistently demonstrates agreed-upon standard, value, or competency.
- D. Level 4
Employee consistently goes beyond agreed-upon standard, value, or competency.
- E. Level 5
Employee consistently demonstrates exemplary performance.

TALLAHASSEE POLICE DEPARTMENT

**GENERAL ORDER 84 – PERFORMANCE EVALUATIONS/PIP
APPENDIX TWO**

PERFORMANCE IMPROVEMENT PLAN (PD 261)

| | | | | | |
|------------------|---------------------|--------------------|---------------------|-------|----------------|
| MEMBER NAME: | | | Last | First | Middle Initial |
| JOB TITLE: | COT #/ 3 Digit ID#: | PIP RATING PERIOD: | | | |
| WORK ASSIGNMENT: | | | DATE PD 261 ISSUED: | | |

The named member is being given this **Performance Improvement Plan** because their job performance is deemed deficient as noted below:

The Performance Improvement Plan provides the member with 90 days to improve their job performance in the specific area(s) identified below. This 90-day period begins on _____ and ends on _____ (must match PIP RATING PERIOD above).

After the end of this time period, a determination will be made regarding whether or not the member has met the requirements of this Performance Improvement Plan. The determination will be documented in writing by numbered memorandum.

If the member fails to improve their job performance to a satisfactory level (i.e., at least a Level 3 in the PRE) in the identified area(s) below, the member will be **placed on conditional status**.

| WHAT? | | HOW? | | WHEN? |
|---|-----------------------------|---|-----------------------------|--------------------------|
| Deficient Competencies: <i>(List only those that apply)</i> | Desired Outcome to Monitor: | Action Plan to Improve Performance: | Results to Monitor/Measure: | Frequency of Monitoring: |
| | | | | |
| | | | | |
| <hr/> Supervisor Signature (also date and acknowledge statement below with check mark) <input type="checkbox"/> This Performance Improvement Plan is based on my personal knowledge and observation of this member's performance. | | <hr/> Member Signature (also date and acknowledge statement below with check mark) <input type="checkbox"/> This Performance Improvement Plan was given to me and discussed with me on this date. | | |
| <hr/> Captain APPROVAL (signature/date) | | <hr/> Bureau Commander APPROVAL (signature/date) | | |

TALLAHASSEE POLICE DEPARTMENT

**PERFORMANCE IMPROVEMENT PLAN (PD 261)
WORK PERFORMANCE ASSESSMENT**

| | | | |
|--------------|------|-------|----------------|
| MEMBER NAME: | Last | First | Middle Initial |
|--------------|------|-------|----------------|

30 Day Progress:

60 Day Progress:

90 Day Progress:

| | |
|---|--|
| <hr/> <p>Supervisor Signature (also date and acknowledge statement below with check mark)</p> <p><input type="checkbox"/> This Work Performance Assessment is based on my personal knowledge and observation of this member's performance.</p> | <hr/> <p>Member Signature (also date and acknowledge statement below with check mark)</p> <p><input type="checkbox"/> This Work Performance Assessment was discussed with me.</p> |
|---|--|