



# Administrative Regulations

Number AR33-2  
Issue 2

**Subject: Policy and Procedures relating to Management Assistant Program.**

## I. PURPOSE:

To establish and implement a Management Assistant Program to achieve the following goals:

- 1) To serve as an on-going recruitment source for entry level management positions;
- 2) To provide management with additional staff assistance in organizing, developing or evaluating City services, programs and activities;
- 3) To develop a new source of creative and innovative ideas that the City can use to its advantage;
- 4) To provide initial job opportunities and experience to qualified college graduates who desire to pursue a career in local government.

## II. SCOPE:

This regulation is applicable to all City departments and offices directly responsible to the City Manager. It is being distributed to other independent departments for informational purposes since Management Assistants may also serve in these departments.

## II. POLICY AND PROCEDURES:

### A. Recruitment of Management Assistants

Applications will be accepted from college graduates who have completed the Master's Degree requirements in public or business administration or a closely related field. The degree requirements must be completed by July 1 of the year in which they propose to serve the City as a Management Assistant.

Recruitment bulletins, inviting applications from qualified graduates and future graduates, will be sent to colleges and universities throughout the country. The purpose is to attract potential management personnel who possess a broad diversity of backgrounds and academic training.

Applications for the position of Management Assistant must be submitted to the Department of Human Resources and Affirmative Action by January 31 to be considered for possible appointment.

### B. Selection and Appointment Process

All applications will be screened by a Management Assistant Committee appointed by the City Manager, or designee. The Management Assistant Committee will select the finalists who will be requested to participate in an assessment center. Selected finalists will be contacted by March 1 and advised when to report to Long Beach for the assessment center.

The City will pay the round-trip coach airfare, meals and lodging in Long Beach for the finalists who are traveling a considerable distance. Finalists who reside in the immediate southern California area will be paid mileage to and from their place of residence, and meals and lodging, if required.

The Management Assistant Assessors will evaluate the management assistant finalists in the assessment center. Offers of employment will be made to the selected finalists after completion of the assessment center.

The selected finalists will serve as Management Assistants for one year, commencing on or about July 1. The Department of Human Resources and Affirmative Action will be responsible for processing the paper work required for the appointment of the Management Assistants.

#### C. Conditions of Employment for Management Assistants

The Management Assistants will be entitled to the same benefits as permanent full-time miscellaneous employees plus five- (5) days-executive leave.

#### D. General Direction of the Management Assistant Program

The Assistant City Manager will be responsible for directing and coordinating the Management Assistant Program and will approve the rotation selections of the Assistants. Following the completion of the orientation period, the Management Assistants report to their departmental assignments. The Assistants will report directly to the department heads in whose departments they are assigned.

#### E. Orientation Period for Management Assistants

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he Management Assistants will begin their City service of one year with a general orientation for their first two weeks of employment.

At the conclusion of the two-week orientation period, the Management Assistants will be required to prepare a brief paper. This paper should summarize their impressions of the orientation period, as well as specific knowledge or insight gained.

Department heads who have Charter-mandated or advisory boards, commissions and committees affiliated with their departments are urged to give the assistants an opportunity to attend meetings of such bodies during the orientation Period.

#### F. Departmental Assignments

The Management Assistants will be assigned to departments for four twelve-week periods during their year of service with the City. The first twelve-week assignment will commence immediately following the two-week orientation period. Management Assistants must serve rotations in two of the following departments: Financial Management, Human Resources and Affirmative Action, or the City Manager's Office. The other two rotations are the choice of the assistant.

#### G. Activity Schedule

In addition to departmental assignments, the management assistants will participate in the following activities as part of their professional development:

- 1) City Manager's weekly department head meetings;
- 2) City Council meetings when significant issues of community-wide interest are to be discussed, or are of relevance to the departments to which they are assigned;
- 3) Meetings of Charter-mandated and advisory boards, commissions and committees, when the subjects to be discussed are pertinent to the Assistants' current Project assignments;
- 4) Monthly meetings with the Assistant City Manager;
- 5) Field trips to supplement the learning experience, when deemed appropriate;
- 6) Attendance at local meetings of professional associations, when deemed appropriate.

#### H. Funding of the Management Assistant Program

Funds for the Management Assistant Program will be included in the Financial Management and City Manager's budgets. If a department wishes a Management Assistant to attend a conference or meeting, that department must approve and fund the activity.

The Assistants are located organizationally in the City Manager's Office for budgetary purposes. The City Manager (or designee) and the supervisory manager must sign the weekly time sheet.

#### I. Evaluation Process for the Management Assistant Program

At the end of the two-week orientation, the Management Assistants shall submit a list of goals and objectives for the year to the Assistant City Manager.

At the beginning of each twelve-week period, the Management Assistant and the supervisory manager in the rotation shall review assigned project objectives, assignments and performance standards. A memo shall be sent to the Assistant City Manager detailing goals and objectives for each rotation. A copy should be sent to the department head and the other Management Assistants.

After six-weeks, the Management Assistant and the supervisory manager should meet to review the progress of the rotation goals and objectives.

At the end of the rotation, the Management Assistant, supervisory manager and department head shall meet to evaluate the rotation. The Management Assistant will provide the department a written evaluation of the rotation and submit a copy to the Assistant City Manager. The department will provide a written evaluation of the Assistant to the Assistant City Manager and a copy to the Assistant.

After the one-year term, the Assistant City Manager will meet with each Management Assistant individually to discuss the year. The Assistant will submit a final written year-end evaluation to the Assistant City Manager.

### MANAGEMENT INTERN PERFORMANCE APPRAISAL SYSTEM

#### I. OVERVIEW

##### A. Purpose

The purpose of the Management Intern Performance Appraisal and Development System is to keep both manager and intern aware of accomplishments, areas in need of improvement, and the potential for future advancement.

##### B. Outline of Activities

1. On the first day of a departmental assignment, the department head will review with the intern the assigned project objectives, assignments, and performance standards. The department head will complete the form, JOB EXPECTATION WORK SHEET and provide the intern with a copy.
2. The intern's performance will be appraised by the department head after completion of the intern's assigned time in that department. This appraisal will involve two major activities: 1) completion of the form, MANAGEMENT INTERN PERFORMANCE APPRAISAL; and 2) a formal performance appraisal interview conducted by the department head.
3. A final summary performance appraisal report on each intern will be compiled by the City Manager's office. This report will provide a composite of all the department heads' performance appraisals and performance appraisal interview notes.
4. Upon completion of his/her internship, the intern will submit the form, MANAGEMENT INTERN PROGRAM EVALUATION. At this time, the intern is given the opportunity to evaluate the overall effectiveness of the program. This input will be valuable in improving the program for the future.

#### II. FORM GUIDELINES

Detailed guidelines for completion of the three forms utilized in the performance appraisal system are provided in this section. These forms are: 1) JOB EXPECTATION WORK SHEET; 2)

MANAGEMENT INTERN PERFORMANCE APPRAISAL; and 3) MANAGEMENT INTERN PROGRAM EVALUATION.

A. Instructions For Completing The JOB EXPECTATION WORK SHEET

1. Purpose of the Form

The purpose of the JOB EXPECTATION WORK SHEET is to ensure that the intern knows what is expected of his/her performance. This work sheet defines the project objectives, assignments, and performance standards established by the department head.

2. Procedure

- a. On the first day of the assignment, the department head reviews with the intern the assigned project objectives, assignments, and performance standards.
- b. The department head provides the intern with a copy of the completed JOB

EXPECTATIONS WORK SHEET.

- c. This work sheet should state clearly the project's purpose, objectives and specific assignments. The standards of - performance should be indicated beside each assignment.
- d. The department head should use the JOB EXPECTATION WORK SHEET as a guide when completing the second form utilized in the performance appraisal system,

MANAGEMENT INTERN PERFORMANCE APPRAISAL.

3. Guidelines for Completing Specific Sections of the Form

\* A completed sample form is provided in this instruction package as an example.

a. Guidelines for Writing Objectives

A well-formulated objective will:

- (1) Start with the word "to," followed by an action verb.
- (2) Produce a single key result when accomplished.
- (3) Specify a target date for its accomplishment.
- (4) Be as specific and quantitative as possible.
- (5) Specify maximum cost factors.
- (6) Specify only the "what" and "when"; avoid venturing into the "why" and how.
- (7) Relate directly to the accountable manager's roles and missions and to higher level roles, missions, and objectives.
- (8) Be realistic and attainable, but still represent a significant challenge.
- (9) Be readily understandable by those who will be contributing to its attainment.
- (10) Provide maximum payoff on the required investment in time and resources, as compared with other objectives being considered.
- (11) Be consistent with the resources available or anticipated.
- (12) Avoid or minimize dual accountability for achievement when joint effort is required.
- (13) Be consistent with basic organizational policies and practices.
- (14) Be willingly agreed upon by both superior and subordinate.
- (15) Be in writing, with a copy kept and periodically referred to by both superior and subordinate.
- (16) Be communicated not only in writing, but also in face-to-face discussions between the accountable manager and those subordinates who will be contributing to its attainment.

4. Guidelines for Establishing Standards

Standards refer to points of measurement by which the supervisor determines whether or not the intern is performing satisfactorily. Performance standards may indicate time, quantity, quality, or effectiveness in the use of resources.

Three factors to consider in establishing performance standards:

- a. They must be realistic and achievable.
- b. They should be set slightly above average.
- c. They should be subject to change.

JOB EXPECTATION WORK SHEET

Dept.		Dept.Head		Date	
Intern		Term of Assignment:	From	To	
Project Title:					
Purpose of the project:					
PROJECT OBJECTIVES & ASSIGNMENTS			STANDARDS EXPECTED		

JOB EXPECTATION WORK SHEET

Dept.	Public Works/Engin	Dept.Head		Date	
Intern		Term of Assignment:	From	To	
Project Title: Financial Analysis of Contract Administration					
Purpose of the project: To monitor current group performance related to costs and schedules and to analyze requirements and forecast future needs in these areas.					
PROJECT OBJECTIVES & ASSIGNMENTS			STANDARDS EXPECTED		
<p>a) Objective To maintain continuous surveillance over and provide appropriate communication to management regarding budgetary and schedule performance on each contract being handled by the group. To be included: 1) Continuous review with notification of significant deviations. 2) Weekly projections of anticipated position on manpower, materials and</p>			<p>1) Notification of significant deviations must reach supervisor within two working days of their occurrence. 2) Notification of anticipated deviations must reach the supervisor as soon as identified, preferably not less than one week in advance.</p>		

<p>schedule. 3) Weekly status reports for inclusion in total department report. b)Objective To analyze requirements and prepare budget estimates for next fiscal year. To be included: 1) Analyze requirements and prepare budget estimates for supervisor's review according to established criteria:     *Annually     *Quarterly 2) Prepare and maintain forecast charts as to current and anticipated performance related to manpower and material costs; schedule maintenance on each contract being handled by group.</p>	<p>3) Prepare rough copy for supervisor by Monday noon; final cc by Friday noon.  1a) Annual budget estimate must reach supervisor not later than 1-1/2 months prior to the end of the quarter.  1b) Quarterly budget estimates must reach supervisor not later than 3 weeks prior to the end of the quarter.  2. Prepare new charts one week in advance of each quarter and update performance actuals (no errors) against budget each week by Friday noon.</p>
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**B. Instructions for Completing the MANAGEMENT INTERN PERFORMANCE APPRAISAL FORM**

**1. Purpose of the Form**

The purpose of this form is to provide a tool that will assist in the appraisal of the intern's performance and identification of development objectives.

**2. Procedure**

Upon completion of the intern's assigned time in a department, the department head will complete the form, MANAGEMENT INTERN PERFORMANCE APPRAISAL. In a performance appraisal interview with the intern, the department head will review this form. A copy of this form will be given to the intern and the City manager.

**3. Guidelines for Completing Specific Sections of the Form**

a. Statement and identification of the project's purpose, objectives and assignments for which the intern was held accountable can be obtained from the previous form, JOB EXPECTATION WORK SHEET.

b. Guidelines for determining the value of Accomplishments and the Performance Achieved

(1) Difficulty of the accomplishment

(a) What barriers had to be handled in the course of accomplishing the result?

(b) what was the nature of these barriers and how difficult to handle were they?

(c) Were the barriers avoidable or were they a result of how the intern pursued the objective?

(d) Did the achievement involve the intern's efforts alone or did it require cooperation and interrelating with others?

(e) How did the intern's approach to the problem affect difficulty?

(2) Supervision and/or manager support required

(a) How much of the manager's time was used in supporting the accomplishments?

(b) How appropriate was the amount of time?

(c) When the intern requested assistance, had he/she identified the problem, some alternative solutions, and the advantages and/or disadvantages of each?

(3) Circumstances outside intern's control that facilitated or inhibited the achievement.

- (a) What happened to inhibit or facilitate achievement besides the intern's efforts?
- (b) What affect did such occurrences have on the overall achievement?
- (c) How appropriate was the intern's handling of the occurrence given the specific situation?
- (4) Effectiveness of the intern in reducing barriers to future achievements.
  - (a) How effective was the intern in establishing working relationships that will facilitate work in the future with the same people or groups of people?
  - (b) If the accomplishment was the solution to a problem, what other problems, if any, did its solution create? What other problems were solved in addition to the original one?
- (5) Intern's efforts to facilitate the achievement of others.
  - (a) What did the intern do to avoid creating barriers for others or, to facilitate the work of others?
  - (b) What kinds of things did the intern do in the course of achieving this accomplishment that contributed in some way to the organization as a team?
- (6) Contribution to organizational objectives.
  - (a) Did the intern make a special contribution to the organization beyond what was considered his/her normal duties?
  - (b) Which organizational objective was impacted?
  - (c) How much was it affected?

c. Guidelines For Evaluating The Performance Factors

In order to assist department heads with the interpretation and measurement of the performance factors, the factors are defined and points for consideration are indicated.

(1) Oral Communication (Ability to present ideas and information concisely and effectively in an oral presentation to a group)

- (a) Organizes logically
- (b) Uses appropriate terms
- (c) Speaks clearly and concisely
- (d) Acts confidently
- (e) Obtains audience attention

(2) Written Communication (Ability to express ideas and information concisely and effectively in writing)

- (a) Organizes logically
- (b) Uses appropriate terms
- (c) Writes clearly and concisely
- (d) Uses appropriate grammar and style

(3) Flexibility (Ability to change or vary one's approach or strategy for the purpose of accomplishing a task)

- (a) Adjusts style to setting
- (b) Adjusts approach to situation needs
- (c) Tries alternatives

(4) Decision Making (Ability to make timely and effective decisions on the basis of available information)

- (a) Uses available information
- (b) Anticipates future
- (c) Recognizes interactions
- (d) Considers situation and alternatives

(5) Performance Stability (Ability to maintain a consistent level of performance under conditions of stress, uncertainty or lack of structure)

- (a) Maintains performance under increased pressure
- (b) Maintains performance under uncertainty

NOTE: Consider only the ability to continue to perform at the usual level.

(6) Leadership (Ability to influence others to perform a task effectively)

- (a) Shows active involvement

- (b) Obtains positive response
- (c) Moves toward objective
- (d) Professionalism
- (7) Organization and Planning (Ability to schedule resources and personnel and to develop systematic and effective means for accomplishing a task)
  - (a) Sets priorities
  - (b) Anticipates needs, avoids schedule conflicts
  - (c) Delegates appropriately
  - (d) Gets work done?
- (8) Inner Work Standards (Extent to which the intern demonstrated a desire to perform at or near the limits of capability most of the time, even when a lesser "effort would have been acceptable)
  - (a) Does best job possible
  - (b) Satisfies own criteria

NOTE: Consider the performance exhibited in comparison with the intern's capabilities, not in comparison with the performance or capabilities of others.

d. Guidelines For Determining Deviations From the Expectations

If a standard is not reached, the cause of deviation might be traced to any one or a combination of three contributing factors.

(1) The Intern

- (a) The intern may have been careless or negligent.
- (b) The job requirements may be beyond his/her capability.
- (c) The project may have held little ch~1-nge or interest for the intern.
- (d) Outside facto s may have affected the intern personally - health, family, financial, legal, etc. - that may have had a temporary adverse effect on performance.

(2) The Supervisor

- (a) The supervisor may have failed to clearly identify the performance expectations.
- (b) The supervisor may have set unrealistic standards (e g. to short a time period).
- (c) The supervisor may have failed to provide the proper tools or training.

(3) The Situation

The situation may have presented some circumstances beyond] the intern's control (e.g. waiting for a key report from another department). Other situational factors are listed below.

- (a) Organizational changes
- (b) Staffing changes
- (c) Budget cuts
- (d) Facility bottlenecks
- (e) Schedule changes
- (f) Design changes
- (g) Changes in laws
- (h) New methods or systems change

NOTE: The real causes of deviation may not actually become apparent until the intern's performance appraisal & development interview.

MANAGEMENT INTERN PERFORMANCE APPRAISAL FORM

Dept.		Dept. Head		Date	
Intern		Term of Assignment:	From	To	
I.	PROJECT ASSIGNMENT				
A.	Defined				
	1.	State the purpose of the project assigned:			

		2.	Identify the specific project objectives and assignments for which the intern was held accountable:
	B.	Performance Achieved	
		1.	List major accomplishments achieved during the assigned time period and compare with the results expected. Take into any account any extraneous circumstances and how these were handled.
		NOTE	Attach additional comment sheets if more space is needed.
		2.	Summarize the intern's performance in view of the objectives established. Indicate not only whether the intern met his/her project objectives, but also the degree to which achieving or not achieving these objectives reflects personal effort and ability. Circumstances over which the intern may not have had control may have affected his/her performance. These circumstances must also be evaluated.
II.	PERFORMANCE FACTORS IN RELATION TO ACCOMPLISHMENTS		
	Comment on the degree to which the following factors were evident in the work accomplished.		
	A.	Job Knowledge	
	B.	Oral Communication	
	C.	Written Communication	
	D.	Flexibility	

	E.	Decision Making
	F.	Performance Stability
	G.	Leadership
	H.	Organization and Planning
	I.	Inner Work Standards
III.	POTENTIAL FOR MANAGEMENT DEVELOPMENT	
	A.	Indicate the causes of any deviation from the expectations established.
	B.	Indicate the performance factors in which the intern needs improvement.
	C.	Indicate the performance factors in which the intern shows the most strength.
	D.	Indicate personal development objectives that will correct the intern's performance deficiencies, increase performance capabilities and prepare for future responsibilities.
	E.	Indicate the intern's potential for future advancement.

IV. Guidelines for Completing the MANAGEMENT INTERN PROGRAM EVALUATION FORM	
1.	Purpose of the Form
	The purpose of this form is to obtain feedback from the interns concerning the program's overall effectiveness. This input will be valuable in improving the program for the future.
2.	Procedure
	The intern will submit this form to the City Manager at the completion of his/her internship.
NOTE	Refer to an example of this form on the following page.

MANAGEMENT INTERN PROGRAM EVALUATION FORM

Intern's Name		Date	
Term of Appointment		to	
Please comment on the following areas:		Attach additional comment sheets if more space is required.	
1.	Supervision (degree, quality, etc.)		
2.	Projects/Fulfillment of project goals (quality, number)		
3.	What would you change in the program to make it more compatible with your career goals?		
4.	How would you improve the management intern program?		