

**CHAPTER 19**  
**SERGEANT'S ORIENTATION**  
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## CHAPTER 19

### SERGEANT'S ORIENTATION

1. GENERAL. The CHP 27, Sergeant's Orientation Checklist, contains 15 tasks with a direct bearing on the uniformed employee's supervisory role. Each task is subcategorized into components/areas of knowledge necessary for the new sergeant to learn in order to function effectively as a supervisor. It should be noted these tasks and their components are not all-inclusive, and commands are encouraged to elaborate on or add to the list as necessary. The CHP 27 is available on the California Highway Patrol Intranet site, on the forms page.
  
2. PURPOSE. The purpose of an orientation is to ensure key points and concepts are covered with the new sergeant prior to concluding the probationary period. The CHP 27 should ease the transition of the newly promoted sergeant into the supervisory role by providing an outline of obligations, privileges, and other information pertinent to their supervisory role. This process is documented on a CHP 27, which provides a systematic guide and documentation record of essential training on departmental and local expectations. Subject to the commander's discretion, it may comprise the bulk of the first and second probationary evaluation reports.
  
3. PROCEDURES.
  - a. Reporting. Upon reporting to the promotional assignment, the new sergeant's immediate supervisor will:
    - (1) List pertinent command/Division Standard Operating Procedures concerns under Task #15 of the checklist.
    - (2) Thoroughly review and discuss the contents of the checklist and the orientation process with the new sergeant and schedule, at minimum, monthly follow-up discussions during the probationary period.
    - (3) Explain local resources available to assist the new sergeant during their probationary period. This shall include the assignment of a designated coach and mentor to assist during probation (refer to Chapter 5, Coaching/Mentoring Program, of this manual). Provide a copy of the CHP 27 to the new sergeant to serve as a personal reference guide.
  - b. Discussions. During initial and subsequent discussions, the coach shall ensure the new sergeant understands the relationships between their actions in the

particular tasks addressed, and command, division, and departmental processes. Throughout the probationary period, the coach should:

- (1) Check back frequently with the new sergeant to show personal interest.
- (2) Be available for consultation and advice.
- (3) Evaluate the adequacy and effectiveness of training and discuss the new sergeant's progress.
- (4) Assist in any manner which might help the new sergeant become a productive, useful, and satisfied member of the command.

c. Coach Comments. The coach shall appropriately comment on the new sergeant's observed performance throughout the probationary period.

(1) Each of the 15 tasks on the CHP 27 shall be checked off and initialed by the coach upon satisfactory completion of discussion and/or demonstration of proficiency. Dates of discussion and/or demonstration of proficiency shall be included whenever possible.

(2) All tasks shall be discussed and completed prior to the end of the new sergeant's probationary period. Once all tasks have been signed off, the new sergeant, the coach and the second-level reviewer shall sign and date the completed CHP 27.

d. Evaluations. The CHP 27 may be used as a source document to prepare subsequent evaluations, including probationary and interim reports. In the case of satisfactory completion of the first and second probationary periods, the evaluation reports may consist of completing page one of the CHP 118S, Performance Appraisal – Sergeant (refer to Highway Patrol Manual [HPM] 10.10, Performance Appraisal Manual, Chapter 4, Performance Appraisal Process for Sergeant, California Highway Patrol, Annex C); a brief summary of the new sergeant's performance; and copies of the completed portions of the CHP 27. This option will be exercised at the discretion of the commander.

e. Retention.

(1) Checklists shall be filed in Section B of the Field Personnel Folder with the new sergeant's performance appraisal reports.

(2) The checklist shall be retained for two years. Refer to HPM 10.10, Chapter 4 for additional information regarding retention of the CHP 118S.