**Performance Goals**

**Goal: Implement a documentation initiative to track the unit’s work assignment and follow-up practices**

**Target Date: 6/30/2011**  **Progress: 100%**  
**Status: Completed**  
**Molly Manager:**

**Rating: Exceeded expectations**

This was an ambitious goal that you successfully achieved by the due date. As we discussed during the year, there were a number of missed opportunities when you could have benefitted by increasing awareness of your efforts and receiving more input from staff. I believe that if you had involved your colleagues in the development process early on, that there would have been fewer iterations of your design along the way and more eventual buy-in from staff when it came to implement the new work assignment and follow-up practices. This approach would have been more consistent with your overall purpose of increasing efficiency and self-sufficiency. However, you were ultimately successful in engaging staff members and through my discussions with them, I have determined that the new practices are well-understood and are having the desired impact on unit performance.

**Goal: Provide high quality customer service to internal and external customers resulting in a 90% customer satisfaction rating on accuracy, timeliness and courtesy measures.**

**Target Date: 6/30/2011**  **Progress: 100%**  
**Status: Completed**  
**Molly Manager:**

**Rating: Fully achieved**

The two customer surveys that were conducted during the year (rating of 93%), along with the 4 letters and 2 e-mails we received from internal customers, indicate that you more than met the expectations for this goal. Your commitment to customer service has been an inspiration to other staff in the unit. One of the best examples from this year was in February when you took the time needed to help the customer who was struggling to complete his project application in time for submission. I observed how you were patient in listening to his questions and concerns and how you offered specific guidance on what he needed to do. It was clear how grateful he was. He approached me the next week and said how pleased he was with your service.

**Development Goals**

**Goal: Learn basic editing and formatting functions of InDesign**

**Target Date: 6/30/2011**  **Progress: 100%**  
**Status: Completed**  
**Molly Manager:**

**Rating: Fully achieved**
You have demonstrated some useful skills using the InDesign software as a result of the training. Although you completed an on-line course, I know you are still practicing with this software and are still learning some of the critical features. I expect that you will continue to improve your skills and be able to take on more graphic projects this next year. When this occurs, the expected cost savings of designing documents in-house will allow us to move forward with the overdue redesign of our customer "How to" guides.

Performance Factors

INDIVIDUAL CONTRIBUTION
Quantity
Quality
Innovation
Level of Effort
Commitment to Service
Attendance
Attention to Safety

Molly Manager:

Rating: Exceeded expectations

Your performance plan contains the specific expectations for this factor that we discussed at the beginning of the cycle year. As indicated in your plan, Level of Effort, Commitment to Service, and Innovation are particularly important for your position.

I appreciate how you approach situations with a "can do" attitude.

Since the beginning of your time here in the unit, you have demonstrated the ability to take on projects with minimal instruction. You see current processes from a different point of view and you are not afraid to ask questions if you think things can be done better. You have suggested streamlining and/or changing processes on more than a few occasions. A good example of this was in October, when you spearheaded revamping the "customer data checklist" used by your co-workers. It was a successful effort that resulted in giving the form a more contemporary feel as well as ensuring consistency.

As we've discussed in our one-on-meetings and at your last interim review, you have had 2-3 periods throughout the year when you were frequently running late from your breaks. Although you have made some progress, you need to continue to ensure that your breaks are only for the allotted time. When you are late it causes your co-workers to stop what they are doing in order to provide coverage for your customers until you return.

You have done really good work managing your current and new assignments this year. You have been able to meet all your important deadlines, and when you couldn't, you let me know in advance. The best example was how you successfully planned, organized and developed the office supply center by the agreed on completion date of January 4. All supplies and equipment were ordered on time and in an appropriate quantity, staying well below the stated budget.

Throughout this past year most of your feedback surveys have indicated that you provided a high level of internal customer service. You work well with your co-workers and you often share ideas and best practices with them in an effort to help.
PROFESSIONALISM
Adherence to County Standards and Policies
Integrity
Respect
Cooperation
Responsiveness
Reliability
Adaptability
Ethical Conduct

Molly Manager:

Rating: Competent and Effective

Your performance plan contains the specific expectations for this factor that we discussed at the beginning of the cycle year. At the beginning of this cycle, and throughout the year, we’ve discussed the importance of Respect, Cooperation, Responsiveness and Reliability and how this particular performance factor is key to being most effective in your position.

You are pleasant, helpful and respectful. You’re open to the suggestions of others and you are often consulted for your perspective on challenging situations.

You usually respond positively to new situations and unscheduled requests in a timely fashion. However, in February when two new assignments were added to your list, you were resistant to accepting the new responsibilities and this caused some workload balance issues with the team. At that time, I gave you feedback, and I was pleased that you offered to make some changes in how you support the team. As an example, while a colleague was on a 3-month special assignment (Mar-May), you volunteered to accept some additional departmental assignments to help ensure workload coverage.

PROBLEM SOLVING and JUDGEMENT
Quality of job-related decisions
Organizational skills
Leadership
Creativity

Molly Manager:

Rating: Exceeded expectations

Your performance plan contains the specific expectations for this factor that we discussed at the beginning of the cycle year. There were two specific areas of focus for you, related to this factor: Quality of job-related decisions and Organizational skills.

You have excellent analytical skills, as demonstrated by your thoroughness in conducting a review of our work order methods. You consistently gather facts before making key decisions and your decisions are timely and made with good judgment. You have the ability to develop good options and make appropriate recommendations. A recent example was last month when you suggested a change to the customer tracking system. This was just implemented and will likely save the department valuable time.

You continue to demonstrate good organizational skills based on your consistent ability to find files and back-up information quickly. You also have reliable time management skills and manage your workload efficiently. This has allowed you the ability to successfully manage your current and new assignments and meet most all of the expectations we agreed
INTERPERSONAL SKILLS
Oral communication
Written communication
Respects different cultures and values
Interpersonal communication

Molly Manager:

Rating: Competent and Effective
Your performance plan contains the specific expectations for this factor that we discussed at the beginning of the cycle year. In your position we agreed that one primary area of focus for you, related to this factor, is: expressing facts and ideas in writing. Interpersonal communication is also very important, and is something you do very well.

Your writing skills could use some improvement. As we've discussed during our Performance Planning meeting, and at our first Interim Review meeting, you are expected to write clear, well-written and well-formatted correspondence, free from grammatical errors. Even though we have discussed these expectations, I have some concerns since two of your project progress reports submitted in January and February were not well organized and contained significant typographic errors. Correcting these errors and editing the reports resulted in a delay in distribution to the management team, which then affected the group's next step planning process. I recommend that we discuss adding the completion of a "Business Writing" workshop to your developmental goals for next year.

You are a good listener, which seems to help you to resolve customer issues so effectively. When a difficult message must be conveyed to a customer in a clear and consistent manner, I always rely on you to handle it effectively. This occurred frequently last November when the unit had a large number of weather-related problems that resulted in an increase of customer complaints.

You keep me involved when necessary and tend to resolve situations at the lowest level.

JOB SPECIFIC CONTRIBUTION
Job specific knowledge
Job specific skills

Molly Manager:

Rating: Competent and Effective
Your performance plan contains the specific expectations for this factor that we discussed at the beginning of the cycle year.

You continue to maintain an appropriate level of technical skills and knowledge based on the feedback I have received from your customers and from my work with you on the Unit's Technical Committee. When you ask questions, they are relevant and it's apparent you've already conducted research into possible solutions. I encourage you to participate in any technical training that may become available, particularly as it relates to creating documents to support the field staff.

MANAGING EMPLOYEE PERFORMANCE (For Managers and Supervisors)
Molly Manager:

Not applicable

DISCRETIONARY FACTOR - OTHER (To be added by Supervisor)
Instructions: Using the Comments box below, add criteria applicable to the Department or Unit, not already covered by the Countywide categories, enter your comments or notes regarding such criteria and then select a rating.

Molly Manager:

Not applicable

Overall Performance Rating and Comment

Employee's Overall Performance

Molly Manager:

Rating: Competent and Effective
One of your assets is your knowledge of technology and your ability to share information with others. I hope you’ll continue to share what you know. I think both you and the department would benefit if you learned more about database software to assist with upcoming projects.

You have been a big help to the Admin team in planning and carrying out special meetings and events throughout this past year. You respond quickly and thoroughly to multiple needs and requests and you show initiative in finding solutions. I know you are interested in exploring other career opportunities within the field and I think you will benefit from spending additional time with the other managers and staff in our department, learning more about their approach to handling the customer issues we face.

Although you achieved good results for your performance and development goals, I believe you can work to improve your goal setting ability. I appreciate the fact that you like to set high goals for yourself, however you have frequently underestimated what was necessary to achieve them which caused you a lot of stress. Setting attainable goals will help you improve your performance and productivity, and will likely provide you with even more incentive. I believe that if you also continue to improve your writing skills you will be in a better position to take on some of the new responsibilities you requested during your Interim Review.

One of the positives from this past year has been how you have cooperated through the difficult restructuring and redesign of the division's organizational structure and workload. You have demonstrated a willingness to work with the transition teams and you are an excellent example of how cooperation can yield positive results.
Over the past year, your attention to customer satisfaction has not gone unnoticed. You work with customers until their problems are resolved and often go the extra step to help customers who are having difficulties.

Emmy, you are a reliable and valued member of the unit. You have met most all of the expectations for your work product and job performance and I'm pleased to have you on our team.

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**Schedule Performance Review Meeting**

On the space provided below, please note down date and time of review meeting with employee.

**Molly Manager:**

Meeting schedule for April 1, 2011 at 11:00 AM