

HILLSBOROUGH COUNTY
CIVIL SERVICE BOARD

EMPLOYEE HANDBOOK

April 30, 2006

CONTENTS

Introduction	1
Process Overview	2
Probationary Review Periods	2
Forms Overview	5
Performance Management Job Definition Form	5
Performance Report.....	6
Custom Rating Scale Worksheet.....	7
Coaching Card	8
Self-Evaluation Report	8
Rating Response Form	8
Impact On Pay.....	8
Meeting 1: Performance Planning Meeting.....	10
Observation, Coaching, And Documentation.....	10
Meeting 2: Mid-Term Meeting.....	11
Meeting 3: End-Of-Term Meeting.....	12
Management Review And Pay Increase Authorization.....	13
Meeting 4: Employee Review / Planning Meeting.....	14
Attachment A - Job Definition Form	15
Attachment B - Performance Report.....	19
Attachment C - Coaching Card.....	25
Attachment D - Self-Evaluation Report.....	29
Attachment E - Rating Response Form	33
Attachment F - Dimension Definitions And Job Performance Rating Scales.....	37
Glossary	58

INTRODUCTION

This edition of the Hillsborough County Civil Service Board's Performance Management Employee Handbook and all related forms included in this Handbook are effective for each employee upon their first Performance Planning Meeting occurring on or after April 30, 2006. Since Performance Review Dates are spread throughout the year, changes to the Process must be phased in rather than implemented on a single date. Previous editions and updates of forms and Handbook pages will no longer be in effect for any employee as of April 30, 2007.

The Employee Handbook contains copies of the required and related forms used throughout the Process. The Handbook and its related forms are available on COIN and through the Civil Service Office Internet site (<http://www.hccsb.org>) in Microsoft Word, and Adobe Acrobat format and may be downloaded, printed and completed as the need arises.

The Civil Service Office also publishes a Rater Handbook for the Performance Management Process. The Rater Handbook is written from a supervisor's perspective and contains additional information not contained in this Handbook. The Rater Handbook is available in the same formats and from the same sources as the Employee Handbook.

Questions or comments concerning the Performance Management Process, Employee or Rater Handbooks and forms should be sent to:

Ronald E. Gardner, Director
Hillsborough County Civil Service Board
601 E. Kennedy Blvd., 17th Floor
Tampa, Florida 33601
(813) 272-5625
(813) 272-5538 (Fax)
(813) 272-5623 (TDD)
<http://www.hccsb.org>

PROCESS OVERVIEW

The Hillsborough County Civil Service Board's *Performance Management Process* emphasizes the following points:

- Collaboration between supervisors and employees in defining job duties and responsibilities.
- Teamwork between supervisors and employees in setting up job-related measures of successful job performance.
- Frequent discussions between supervisors and employees about the job and job performance.
- Job specific performance ratings.
- An overall job performance rating.
- Raters trained to use the process correctly.
- Procedures that are clear and fair.

The *Performance Management Process* is based on the principle that people can only do their best when they know *what they are expected to do* and *receive accurate and frequent information on how well they are doing*. The Performance Management Process is a continuous process of communicating expectations and providing constructive feedback (coaching) to improve job performance.

The purpose of this Handbook is to help employees understand the Hillsborough County Civil Service Board's Performance Management Process. The procedures described in this Handbook are consistent with **Rule 12** of the Civil Service Board Rules.

PROBATIONARY REVIEW PERIODS

Each employee's career as a classified County employee is divided into a series of Performance Review Periods. Employees newly hired begin their career in County government on initial probation which normally lasts six months. Initial probationary employees are evaluated twice during the review period prior to achieving permanent status: Once at the mid-point of the probationary period, and again 2-4 weeks prior to the end of the probationary period. Both rating periods are documented on one Performance Report.

The Performance Reports for probationary employees should be signed and due in the Civil Service Office prior to the end of the probationary employees' probationary periods. If the Performance Report is not signed and finalized prior to the expiration of the probationary period, the employee is awarded permanent status by default under Civil Service Rule 7. After the new hire successfully completes initial probation, the next review period will be six months in length and documented on a new Performance Report. At the successful completion of the second review

period, the employee's review periods will be twelve months in length or until the employee is promoted. An example, including dates, is shown below.

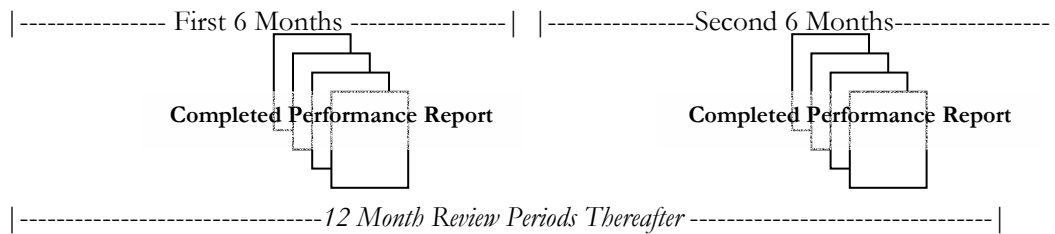
Example: In the example provided below, a new employee is hired into the classified Civil Service on October 3rd and begins a six month initial probationary period:

Employee Hire Date.....	October 3
Performance Planning Meeting.....	October 3 – November 3 (within 30 days of hire)
Mid-Term Meeting.....	January 3 (midpoint of 6-month review period)
End-of-Term Meeting.....	March 3 (4 weeks prior to the end of probation)
Submit Signed Report to CS Office.....	No later than April 3
Permanent Status.....	April 3 (Based on successful overall rating)
Next Performance Review Date.....	October 3

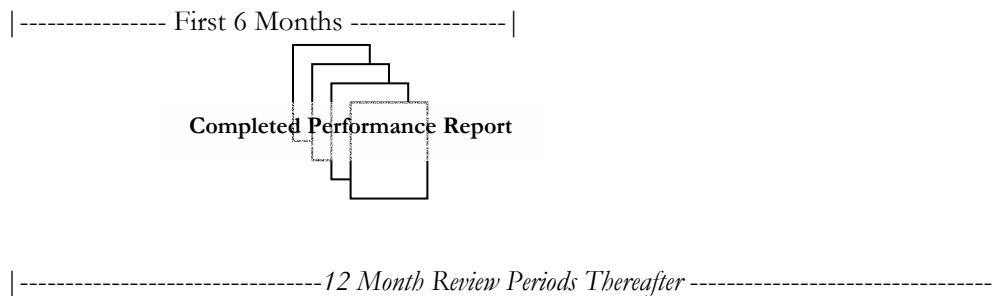
NOTE: A new employee is not eligible for a pay increase at the end of Initial Probation. A second six month Review Period follows Initial Probation (see graphic below). At the end of the second six month Review Period, new employees who achieve a Successful or higher Overall Rating are eligible for their first pay increase and their review periods from then on will be 12 months long. One exception to the above statement is when an employee is **Promoted**. When promoted, employees will be evaluated during a six month Review Period called **Conditional Probation**. A completed Performance Report is submitted at the end of the Conditional Probation period. Employees who successfully complete the conditional probationary period are awarded a salary increase and their review periods from then on will be 12 months long. Other exceptions are in cases of **extended leaves of absence of 30 days or more** or implementation of the **Performance Improvement Program (PIP)**. In these cases, the Performance Review Period is extended by the amount of time on leave or length on PIP.

Review the following graphics to differentiate between Initial and Conditional Probationary periods.

Initial Probationary Employee:



Conditional Probationary Employee:



The Performance Management Process described in this Handbook requires the Rater to formally meet with the employee and Reviewer at specific stages in the employee's Review Period. Briefly, the meetings are described below:

First Meeting - Performance Planning Meeting. At this meeting the Rater and employee discuss and agree upon the dimensions and priority ratings which the employee will be rated on in the upcoming review period.

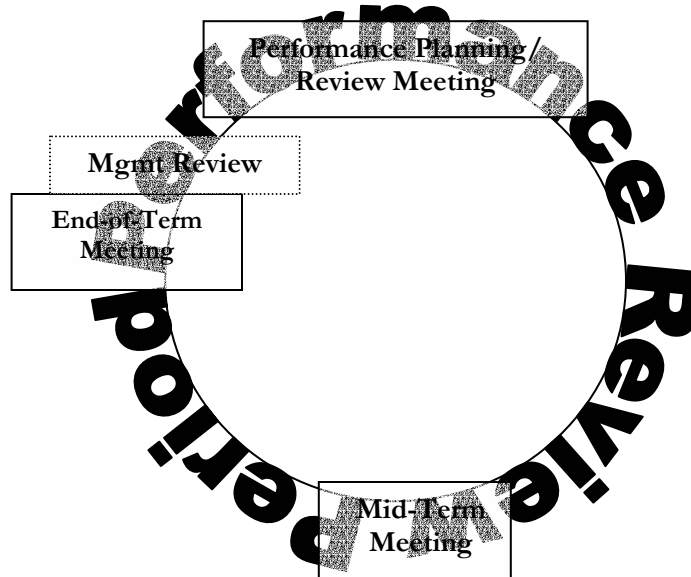
Second Meeting - Mid-Term Meeting. This meeting occurs halfway through the Review Period for the Rater to explain to the employee his/her performance during the first-half of the Review Period.

Third Meeting - End-of-Term Meeting. Approximately 4 weeks prior to the end of the employee's Review Period, the Rater and employee meet to discuss individual performance ratings for the entire Review Period and for the Rater to inform the employee of his/her Overall Rating.

Management Review - The employee's Performance Report and Rating Response form is reviewed by the Reviewer and Agency Head (or delegate) who in turn may provide comment but at a minimum sign and date the Performance Report.

Final Meeting - Performance Review Meeting. At this meeting the Rater and employee meet to discuss the final disposition of the Report; employee reviews comments made by the Reviewer and Agency Head (or delegate); employee signs and dates the Report. This meeting also serves as the first meeting of the next Review Period and the cycle starts over again.

Keep in mind that whenever the Rater is not formally meeting with the employee to discuss performance, the Rater is focusing on being a good “Coach” and providing the employee with frequent and informal feedback concerning job performance, and in particular, ways to improve performance. The graphic below represents a performance review period and shows the relative position when each of the required meetings occur.



FORMS OVERVIEW

This section is organized around the following form titles and types:

- Performance Management Job Definition Form
- Performance Report
- Custom Rating Scale Worksheet
- Coaching Card
- Self-Evaluation Report
- Rating Response Form

PERFORMANCE MANAGEMENT JOB DEFINITION FORM

The key to making the evaluation of job performance meaningful is to make it job related. The key to making it job related is to use a current description of position duties and responsibilities and link the duties to two or three related performance dimensions. A Performance Management Job Definition Form is provided for you at Attachment A to help you categorize position duties and link them to performance dimensions.

PERFORMANCE REPORT

A copy of the Performance Report is provided at Attachment B of this Handbook. The Report is tailored, by the Rater with input from the employee, to fit each job. Raters tailor the Report by selecting the most relevant *Dimensions* from a menu of Dimensions. Raters also may tailor the *Dimension Rating Scales*, as necessary, to more closely match job duties and responsibilities. Dimensions are explained, in detail, later in this section.

The Performance Report has *four pages*:

- ***PAGE 1*** provides space to identify general information about the employee and Rater, the purpose of the job performance evaluation, the outcome of the job performance evaluation, and areas to sign and date showing that the Performance Planning Meeting took place.
- ***PAGE 2*** provides space for the Rater to rate the employee's job performance during the first half of the Review Period and areas to sign and date showing that the Mid-Term Meeting took place.
- ***PAGE 3*** provides space for the Rater to rate the employee's job performance during the entire Performance Review Period and an area (for the Rater only) to sign and date showing that the End-Of-Term Meeting took place.
- ***PAGE 4*** provides space for the Rater's supervisor and the Agency Head or Delegate to write comments about the employee's job performance and sign and date the Report. Space is also provided for the employee to write comments, and sign and date the Report.

Dimensions describe broad groups of job duties. Attachment F includes descriptions of the twenty Dimensions used in this Process. The following is a brief summary of how your supervisor will be working with Dimensions. The Rater:

- Selects Dimensions that best match job duties and responsibilities from the *Performance Management Job Definition Form*.
- Assigns a Priority Rating to each Dimension.
- Tailors Dimension Rating Scales, as necessary.
- Discusses the links between job duties, Dimensions, and Priority Ratings with the employee.
- Rates the employee's job performance on each Dimension listed on the Performance Report at the Mid-Term and End-of-Term Meetings and writes down examples of specific job performance that support the ratings assigned.

Six *Standard Dimensions* have been pre-selected for all jobs and are pre-printed on the top half of Pages 2 and 3 of the Performance Report. No substitutions may be made for the six Standard Dimensions. All employees must be rated on each of them.

The six Standard Dimensions are: * Attendance * Customer Service * Interpersonal Relations * Job Knowledge * Rule Conformance * Team Work

Five blank spaces are provided on Pages 2 and 3 of the Performance Report for **Custom Dimensions**. It is the Rater's responsibility to select the custom dimensions and include them on the bottom-half of each page.

The Rater selects up to five Custom Dimensions to cover the employee's job duties and responsibilities, and places them the blank rows on Pages 2 and 3 of the Performance Report. The following rules apply to selecting Custom Dimensions:

1. Dimensions may not be used or listed more than once.
2. The Rater may not rewrite or tailor Dimension definitions nor create new ones. The Rater may, however, tailor the Dimension rating scales.
3. The Dimensions the Rater selects must be job-related.
4. The Dimensions listed on Page 2 of the Performance Report must match those listed on Page 3.

A job related Dimension describes important things done in a specific job. A Dimension that is very job related for one position may not be as job related for another position. This is often true even when the two positions share the same Civil Service job title.

After your supervisor selects the Custom Dimensions to use, a **Priority Rating** is assigned to all Dimensions on the Report. Priority Ratings show which Dimensions are more important than others. Priority Ratings are written on Pages 2 and 3 of the Report in the Columns headed with a "I" (Roman numeral one).

After your supervisor discusses job duties, the Dimensions on the Report, and Priority Rating assignments with you at the Planning Meeting, the Rater sets the Performance Report aside and does not use it again until just before the Mid-Term Meeting and just before the End-Of-Term Meeting. At those times, the Rater must **rate** your job performance on each Dimension shown on the Performance Report and write comments to support those ratings.

Job Performance Ratings are placed in the column headed with a "II" (Roman numeral two) to the far right of each Dimension title on Pages 2 and 3 of the Report. **Comments** are written in the large space next to each Dimension title. Comments are written examples of employee job performance that support the ratings you received for each Dimension. Mid-Term Comments are optional but may be written on Page 2 of the Performance Report. End-Of-Term Comments are mandatory and written on Page 3 of the Performance Report.

CUSTOM RATING SCALE WORKSHEET

The **Custom Rating Scale Worksheet** is used to tailor some or all Dimension Rating Scales to better match the duties and responsibilities of a specific employee's job. Use of the Worksheet is optional. The Worksheet is most useful when a Dimension's Rating Scale does not fit well with the duties of your job.

COACHING CARD

A *Coaching Card* is provided at Attachment C of this Handbook. The Card is used by your supervisor to write down or *document* significant job performance *events* (both positive and negative) *AND* to describe, in writing, the *Coaching* provided to you about the event.

SELF-EVALUATION REPORT

A *Self-Evaluation Report* is provided at Attachment D of this Handbook. Space is provided on the Self Evaluation Report for you to document your significant achievements during the Review Period. Space is also provided for you to rate your own job performance in each area listed on the Self Evaluation.

You rate your job performance by writing the first letter of the rating (U,M,S,E,O) in the appropriate block. To be fair and consistent, always review the *Dimension Rating Scales* in Attachment F before rating your job performance. Your Rater will use the dimension definitions and rating scales in the same way.

RATING RESPONSE FORM

The *Rating Response Form* is provided at Attachment E of this Handbook. It is a mandatory form that must be completed by all employees. Employees must complete the Rating Response Form and return it to the Rater within a timely manner following the End-of-Term Meeting.

The purpose of the Rating Response Form is to give employees an opportunity to have their opinion of their supervisor's ratings seen by two higher levels of management above the Rater. In addition, the employee's comments on the Form become a part of their official Civil Service record.

IMPACT ON PAY

The topic of pay increases is of interest to most employees and supervisors. However, it is not part of the Hillsborough County Civil Service Board's Performance Management Process. The Performance Management Process concludes with the assignment and discussion of End-Of-Term Dimension Ratings and an Overall Rating.

In Hillsborough County Government, the Overall Performance Rating is used to make pay increase decisions. There is variation among County agencies as to how the Overall Performance Rating is used to determine pay increases. Civil Service Board Rules require that all agency policies include the following provisions:

- Fair and consistent treatment of all employees.
- No pay increases may be awarded to employees with an Overall Performance Rating of "Marginal" or "Unsatisfactory"

At the beginning of each fiscal year, each agency publishes a policy that identifies the pay increase percentage that will be awarded for each of the five possible Overall Performance Ratings. Ask your human resources or administration department for your agency's policy for the current fiscal year.

Most County Agencies now have a Pay Increase Policy similar to one of the two examples shown below. The table simply shows the link between each Overall Performance Rating and a Pay Increase Percentage. Notice that in Example 1, the size of the Pay Increase Percentage varies depending on the Overall Rating received (variable). In Example 2 it does not (flat).

THESE ARE ONLY EXAMPLE PAY INCREASE POLICIES. The specific percentages shown in the table are not intentionally meant to reflect current policies.

Overall Performance Rating	Example 1 Pay Increase %	Example 2 Pay Increase %
Outstanding	5.0%	3.0%
Exceptional	3.5%	3.0%
Successful	2.5%	3.0%
Marginal	0.0%	0.0%
Unsatisfactory	0.0%	0.0%

Table 1. Pay Increase Policy Examples

MEETING 1: PERFORMANCE PLANNING MEETING

Overview

- WHAT: A meeting attended by you and your Rater.
- WHEN: The Performance Planning Meeting should occur as early as possible in the Performance Review Period or even before the Review Period begins. *This meeting may be combined with the final meeting of the preceding Performance Review Period.*
- WHY: To provide you with guidance to focus your job performance efforts.
To get input from you about the job and how to do it.
- HOW: Review and agree upon job duties and responsibilities.
Work together with your supervisor to identify the Dimensions that will be used to rate your job performance.
Sign and date page 1 of the Performance Report in the space provided.
At the end of the Planning Meeting, you should receive a copy of page 2 of the Performance Report indicating selected dimensions and priority ratings.

OBSERVATION, COACHING, AND DOCUMENTATION

Overview

Observation means looking and listening. In Performance Management, we observe job performance so we can improve job performance. One of your Rater's job duties is to observe your job performance and help you improve (coach you) throughout each Review Period

Coaching involves helping you to do your job as well as you can. Your Rater should frequently talk and listen to you about your work: how well you are doing, what can be done differently, what should be done more often (priorities), etc. Listen to your Rater carefully and be willing to do things differently.

Documentation means writing. In Performance Management we Document to help us remember events from the beginning of each Review Period. Good and consistent documentation makes the task of rating job performance much easier. Documentation is intended to be a reminder for the Rater, it is not intended to be used as the Rater's "Black Book" or secret list of poor job performance examples.

- WHEN: Active observation, coaching, and documentation takes place throughout the Review Period.

MEETING 2: MID-TERM MEETING

Overview

WHAT: A meeting attended by you and your Rater to discuss your job performance during the FIRST HALF of the Review Period.

WHEN: The Mid-Term Meeting should occur as close to the middle of the Performance Review Period as possible.

If the Review Period is one year (as it is with most employees), the Mid-Term Meeting should occur at the six month point.

If the Review Period is six months (as it is for newly hired and promoted employees serving on Initial or Conditional Probation), the Mid-Term Meeting should occur at the three month point.

WHY: To give you feedback concerning your job performance during the FIRST HALF of the Review Period.

To help you to improve your job performance during the second half of the Review Period.

HOW: Discuss your job performance during the FIRST HALF of the Review Period with your Rater. You may complete a Self-Evaluation Report and bring it to the meeting. A Self-Evaluation Report is included at Attachment D.

Both you and your Rater should sign and date Page 2 of the Performance Report.

You should receive a copy of Page 2 of the Performance Report that includes the Mid-Term Ratings.

MEETING 3: END-OF-TERM MEETING

Overview

- WHAT: A meeting attended by you and your supervisor to discuss your job performance during the ENTIRE Performance Review Period.
- WHEN: The End-Of-Term Meeting should occur four weeks before the end of the Performance Review Period to allow enough time to complete the Report and process related paperwork (Change of Status Form for example). Four weeks is recommended to be sure that the employee receives the pay raise he or she has earned on the earliest possible pay period following the conclusion of the performance review period.
- WHY: To provide you with job performance feedback about your job performance during the ENTIRE Performance Review Period.
- To help you improve job performance during the next Review Period.
- HOW: Discuss your job performance during the ENTIRE Performance Review Period with your Rater. You may complete a Self-Evaluation Report and bring it to the meeting.

You should NOT sign the Report at this time.

Your Rater must provide you with a Rating Response Form. You should complete the Response Form and return it to your Rater within a timely fashion or within the time frame predetermined by your Rater.

You should receive a copy of Page 3 of the Performance Report that includes the End-Of-Term Ratings.

MANAGEMENT REVIEW AND PAY INCREASE AUTHORIZATION

Routing the Performance Report (complete with End-Of-Term Ratings, Comments, an Overall Rating, a recommended Pay Increase Percentage, and the Rater's signature) and your completed Rating Response Form to two levels of management above your Rater and, then, back to your Rater.

The Management Review and Pay Increase Authorization Process should begin about 2-3 weeks before the end of the Performance Review Period to provide two levels of management above your Rater the opportunity to include their comments and signatures in your Performance Report. This review process also occurs to provide you with an opportunity to have your written opinion (by what you write on the Rating Response Form) of the job performance ratings you received seen by two higher levels of management above your supervisor.

Management Review also takes place to ensure the Report is accurate and complete; and that the Overall Performance Rating is an accurate summary of your job performance during the entire Performance Review Period; and to receive final approval for the recommended Pay Increase Percentage.

WHEN DOES THE MANAGEMENT REVIEW PROCESS BEGIN?

When your Rating Response Form is turned into your supervisor and routed along with the Performance Report through the Reviewer to the Agency Head (or Delegate) for signature and comments.

WHAT DOES THE REVIEWER AND AGENCY HEAD DO?

The Reviewer and Agency Head review the Performance Report and Rating Response Form to provide comments, and to give due consideration to rating disagreements. Any rating disagreements are resolved by the Agency Head (or delegate) in accordance with Civil Service Rule 12. They also provide comment and sign and date their respective sections of page 4 of the Performance Report.

Upon completion by the Agency Head (or delegate), the Performance Report is returned to the Rater in preparation for MEETING 4: The Employee Review/Performance Planning Meeting.

MEETING 4: EMPLOYEE REVIEW / PLANNING MEETING

Overview

WHAT: A meeting attended by you and your supervisor to complete the past year's Performance Report and begin the next year's Performance Report.

WHY: To give you the opportunity to review the completed Performance Report, including comments made by the Reviewer and Agency Head, and to comment on, sign and date the Report.

To close-out the current Review Period and to begin a new Review Period.

WHEN: About 1 week before the end of the Performance Review Period.

HOW: You review the comments written by the Reviewer and Agency Head (or delegate) on the Performance Report.

You will have an opportunity to write comments and to sign and date the Performance Report at the bottom of Page 4.

You should be provided with a copy of the final, completed Performance Report for the recently closed Performance Review Period.

At the end of this Meeting, you should receive a copy of Page 2 of the Performance Report for the upcoming Performance Review Period that indicates selected Dimensions and Priority Ratings.

ATTACHMENT A
JOB DEFINITION FORM

PERFORMANCE MANAGEMENT JOB DEFINITION FORM

JOB DUTIES & ASSOCIATED PERFORMANCE DIMENSIONS

- Column 1: List the job duties of the position, regardless of importance. List both routine and special duties. Describe duties as completely and accurately as possible. If necessary, copy page two of this form before beginning if you think you will need additional space to write job duties. **Make sure the duty descriptions are clear so that someone unfamiliar with your job can understand what you do.**
- Column 2: Read the Dimension definitions beginning on page 37 of the Employee Handbook to identify two or three of the most important dimensions that relate or show a relationship to the job duty.

Example	Column 1: Job Duties	Column 2: Associated Dimensions
	<i>Reviews mechanical design drawings and technical specifications from turbine manufacturers to verify compliance with contract specifications.</i>	<i>Job Knowledge Decision Making</i>
	<i>Writes correspondence, various reports, and agenda items to communicate information to others and document activities for audit trail purposes.</i>	<i>Written Communication Job Knowledge</i>
	<i>Interviews employees to identify important job duties for use in developing position descriptions.</i>	<i>Oral Communication Interpersonal Relation</i>

ATTACHMENT B

PERFORMANCE REPORT

HILLSBOROUGH COUNTY CIVIL SERVICE BOARD
CLASSIFIED SERVICE PERFORMANCE REPORT (Page 1)

INSTRUCTIONS: Complete this Report using a computer, a typewriter, or by printing in BLACK ink (it is essential that you print clearly). Instructions for completing this Report can be found in the most recent edition of the Hillsborough County Civil Service Board Employee Handbook.

EMPLOYEE INFORMATION

Name: _____		
(Last)	(First)	(Middle)
Employee Number: _____	Review Period: _____ to _____	
	(From)	(Perf Review Date)
Job Class Title & Job Class Code: _____		
Department Name & Number: _____		

RATER INFORMATION

Name: _____ Employee No: _____		
(Last)	(First)	(MI)
Months During Review Period Employee Reported Directly to Rater: _____		

PROCESSING INFORMATION

Purpose:	<input type="checkbox"/> 12 Month Rating	<input type="checkbox"/> 6 Month Rating	<input type="checkbox"/> Other: _____
Outcome:	<input type="checkbox"/> Initial Probation Completed (Not Eligible For Pay Increase)	<input type="checkbox"/> Pay Increase of _____%	
	<input type="checkbox"/> Conditional Probation Completed (Eligible For Pay Increase)	<input type="checkbox"/> Increase Denied	
	<input type="checkbox"/> Probation Extended _____ Months	<input type="checkbox"/> Enroll in PIP	

OVERALL PERFORMANCE RATING

Assign an overall performance rating based upon a careful review of performance throughout the current performance Review Period using the rating scales below:	
<input type="checkbox"/>	O utstanding..... Exemplary benchmark performer; Outstanding in all or almost all Dimensions.
<input type="checkbox"/>	E xceptional..... Performance consistently exceeds the minimum requirements of the position.
<input type="checkbox"/>	S uccessful..... Consistently proficient in meeting the minimum requirements of the position.
<input type="checkbox"/>	M arginal..... Sometimes falls below the requirements of the position; Marginal in one or more Dimensions.
<input type="checkbox"/>	U nsatisfactory Performance is consistently below minimum requirements of the position.

CERTIFICATION OF DISCUSSION HELD AT BEGINNING OF REVIEW PERIOD

Certification by Rater: I hereby certify that I met with this employee today and discussed my expectations of his/her job performance for the coming Review Period.	
Signature of Rater: _____	Date: _____
Certification by Employee: I hereby certify that I met with my Rater today, discussed my expected job performance, and now have an understanding of my rater's expectations of me in the coming Review Period. I received a copy of this form. My signature does not indicate agreement with my rater's expectations, only that I understand what they are.	
Signature of Employee: _____	Date: _____

Hillsborough County Civil Service Board Classified Service Performance Report (Page 2)

EMPLOYEE NAME: _____

STANDARD DIMENSIONS: MID-TERM COMMENTS (OPTIONAL)

	I	II
Attendance		
Customer Service		
Interpersonal Relations		
Job Knowledge		
Rule Conformance		
Team Work		

CUSTOM DIMENSIONS: MID-TERM COMMENTS (OPTIONAL)

Certification by Rater: I hereby certify that I met with this employee today, discussed his/her job performance since the beginning of the Review Period and what he/she should do throughout the remainder of the Review Period.

Signature of Rater: _____ Date: _____

Certification by Employee: I hereby certify that I met with my Rater today, discussed my job performance since the beginning of the Review Period and what I can do to perform well throughout the remainder of the Review Period. I received a copy of this form. My signature does not indicate agreement with the feedback provided by my Rater, only that we met and discussed my past and future job performance.

Signature of Employee: _____ Date: _____

DIMENSION PRIORITY RATING SCALE

I	A = High Priority
	B = Medium Priority
	C = Low Priority

JOB PERFORMANCE RATING SCALE

II	O = Outstanding M = Marginal
	E = Exceptional U = Unsatisfactory
	S = Successful

STANDARD DIMENSIONS: END-OF-TERM COMMENTS (MANDATORY)

	I	II
Attendance		
Customer Service		
Interpersonal Relations		
Job Knowledge		
Rule Conformance		
Team Work		

CUSTOM DIMENSIONS: END-OF-TERM COMMENTS (MANDATORY)

Certification by Rater: I hereby certify that the above comments and ratings constitute my best judgement of the job performance of this employee and are based on personal knowledge of his/her work during the most recent Review Period.

Signature of Rater: _____ Date: _____

EMPLOYEE NAME: _____

REVIEWER COMMENTS

Comments:

I hereby certify that I have carefully reviewed this report and discussed any inconsistencies/errors noted with the Rater.

Signature of Reviewer: _____

Date: _____

AGENCY HEAD (OR DELEGATE) COMMENTS

Comments:

I hereby certify that I have reviewed this report. I authorize the pay increase percentage indicated on the front of this report.

Signature of Agency Head (or delegate): _____ Date: _____

Printed Name of Agency Head (or delegate): _____ Date: _____

EMPLOYEE COMMENTS

Comments:

I hereby certify that I have received a copy of this performance report and that it has been discussed with me. My signature does not indicate agreement or disagreement with this report.

Signature of Employee: _____

Date: _____

ATTACHMENT C

COACHING CARD

COACHING CARD - FOR ALL JOBS

RATER'S NAME: _____ EMPLOYEE'S NAME: _____

REVIEW PERIOD: ___ / ___ / ___ through ___ / ___ / ___
 MID-TERM MEETING DATE: ___ / ___ / ___ END-OF-TERM MEETING DATE: ___ / ___ / ___

TIPS ON USING THIS FORM:

- ✓ WRITE down Successful and Non-successful events.
- ✓ TALK to the employee about each event before you write it down. You don't have to show the employee this form, just discuss what happened.
- ✓ SCHEDULE Mid-Term (middle of Review Period) and End-Of-Term Meetings (1 month before end of Review Period) EARLY and TELL employee.

What Happened...	What You Did... (Talked with employee, provided feedback, etc.)	Follow Up/Results/Employee's Response...etc.
Date: ___ / ___ / ___ Time: Description:	Date: ___ / ___ / ___ Time: Description:	Date: ___ / ___ / ___ Time: Description:
Date: ___ / ___ / ___ Time: Description:	Date: ___ / ___ / ___ Time: Description:	Date: ___ / ___ / ___ Time: Description:

What Happened...	What You Did... (Talked with employee, provided feedback, etc.)	Follow Up/Results/Employee's Response...etc.
Date:___/___/___ Time: Description:	Date:___/___/___ Time: Description:	Date:___/___/___ Time: Description:

ATTACHMENT D

SELF-EVALUATION REPORT

DIMENSION PRIORITY RATING SCALE

I	A = High Priority
	B = Medium Priority
	C = Low Priority

JOB PERFORMANCE RATING SCALE

II	O = Outstanding M = Marginal
	E = Exceptional U = Unsatisfactory
	S = Successful

STANDARD DIMENSIONS: COMMENTS	I	II
Attendance:		
Customer Service:		
Interpersonal Relations:		
Job Knowledge:		
Rule Conformance:		
Team Work:		

CUSTOM DIMENSIONS: COMMENTS	I	II

ATTACHMENT E

RATING RESPONSE FORM

HILLSBOROUGH COUNTY CIVIL SERVICE BOARD
PERFORMANCE MANAGEMENT PROCESS

RATING RESPONSE FORM

Employee Name/Job Title: _____

Employee Number: _____

Rater's Name/Job Title: _____

Department Name: _____

Rating Period: _____ - _____

(FROM) (THROUGH)

DIRECTIONS: It is **mandatory** that each employee complete this form at the end of each Performance Review Period. When complete, this form should be returned to the Rater, attached to the Performance Report and reviewed, along with the Report, by the Reviewer and Agency Head (or delegate).

If you **DO NOT** have comments concerning the Performance Report, simply check the box below and sign and date the form at the bottom to indicate that you were afforded the opportunity to provide written comments.

I have no written comments to make at this time (sign below).

If you **DO** have comments, check the box below, write your comments in the spaces provided below and sign and date the form.

My comments are written below.

1. What comments do you have concerning your Performance Report?

2. Explain any agreements or disagreements you have with your job performance ratings (give examples of **specific** job performance):

Signature: _____ Date: _____

ATTACHMENT F

DIMENSION DEFINITIONS AND

JOB PERFORMANCE RATING SCALES

S = STANDARD
C = CUSTOM

C	ADMINISTRATIVE SUPPORT ACTIVITIES	38
S	Attendance	39
C	Care Of Equipment/Tools/Vehicles.....	40
S	CUSTOMER SERVICE	41
C	Decision Making.....	42
C	Following Directions	43
S	Interpersonal Relations	44
C	Job Effort	45
S	Job Knowledge	46
C	Management	47
C	Oral Communication	48
C	Performance Management	49
S	Rule Conformance	50
C	Safety Awareness	51
C	Supervision	52
S	Team Work	53
C	Word Processing/Data Entry	54
C	Work Quality	55
C	Work Quantity	56
C	Written Communication.....	57

NOTE: This Dimension does not include word processing or data entry.

Definition: The extent to which the employee performs a wide variety of administrative support tasks in a timely and accurate manner. Examples of tasks included in this Dimension are filing, scheduling meetings and use of rooms, receiving and screening visitors and calls, taking/relaying messages, making mathematical calculations, distributing information, operating office machines, supply stock maintenance, etc.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Often falls below meeting office standards concerning the timeliness and accuracy of administrative support tasks.

MARGINAL

Occasionally falls below office standards concerning the timeliness and accuracy of administrative support tasks.

SUCCESSFUL

Meets, and may occasionally exceed office standards concerning the timeliness and accuracy of administrative support tasks.

EXCEPTIONAL

Performance consistently exceeds office standards concerning the timeliness and accuracy of administrative support tasks. The employee has produced highly positive results with a high level of achievement.

OUTSTANDING

Far exceeds office standards concerning the timeliness and accuracy of administrative support tasks. Highest level of achievement possible; an exemplary benchmark performer.

Definition: The overall impact of the employee's job performance in areas related to attendance on the effectiveness of the organization or work unit. Includes such issues as:

- Arriving on time for work, limiting breaks and lunches to the allotted time, and leaving on time.
- Use of leave in accordance with rules and policies.
- Communication and cooperation with management in providing proper notice of leave.
- Patterns of leave usage.
- Amount of sick leave usage relative to established standards.

LEGITIMATE USES: The following types of absence should NOT normally be considered in evaluating the Attendance Dimension of an employee's job performance: Properly Scheduled and Approved Annual Leave; Properly Scheduled and Approved Sick Leave (e.g., outpatient surgery, medical appointments, etc.); Civic Leave; Emergency Leave; Bereavement Leave; Military Leave; Family and Medical Leave Act Leave; Supplement Worker's Compensation Benefit

RATING SCALE

Rating

Definition

UNSATISFACTORY

Attendance falls below successful standards for the position; employee has been coached and/or reminded on many occasions regarding his/her attendance.

MARGINAL

Attendance occasionally falls below successful standards for the position; employee has been coached and/or reminded on more than one occasion regarding his/her attendance.

SUCCESSFUL

Attendance meets successful standards for the position; is a timely and dependable employee.

EXCEPTIONAL

Attendance exceeds the successful standard regarding arriving on time for work, limiting breaks and lunches to the allotted time, and leaving on time. Always conforms to the use of leave in accordance with rules and policies and communication and cooperation with management in providing proper notice of leave. The amount of unscheduled sick leave usage falls within the relative benchmark set for exceptional performers.

OUTSTANDING

Attendance is exemplary; always arrives at work on time; rarely, if ever, has this employee arrived late from breaks or lunch; rarely, if ever, did the employee call in sick during the review period or use unscheduled leave; highest level of achievement possible; benchmark attendance. The amount of unscheduled sick leave usage falls within the relative benchmark set for outstanding performers.

Definition: The willingness and ability to take care of equipment, tools and vehicles according to prescribed standards and schedules.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Rarely shows proper care for equipment/tools/vehicles; rarely checks for proper operation prior to use of equipment or tools; often does not report equipment wear and damage; scheduled maintenance is rarely done on time.

MARGINAL

Occasionally fails to meet the requirements in care of equipment/tools/vehicles; inconsistent in following standard operating procedures regarding equipment, tools, vehicles, etc.

SUCCESSFUL

Proficient in meeting all the requirements in the care of equipment, tools, and/or vehicles. Reliably performs care of equipment/tools; checks for proper operation prior to use of equipment or tools; reports equipment or vehicle wear and damage; scheduled maintenance is done on time; equipment, tools and/or vehicles are cleaned regularly.

EXCEPTIONAL

Frequently exceeds the requirements in the care of equipment, tools, and/or vehicles; immediately reports problems; tools are kept exceptionally clean and organized.

OUTSTANDING

Time and again far exceeds requirements in the care of equipment/tools; goes out of the way to make sure equipment/tools/vehicles work properly at all times; is a model for other employees in the safe and proper use and care of equipment/tools/vehicles.

NOTE: Hillsborough County government is a large, complex organization with many internal and external customers. Hillsborough County government has an organizational philosophy to provide the best possible products and services to citizens and staff. Everyone is a customer who directly or indirectly receives knowledge, services, products, and information from staff.

Definition: The willingness and ability to provide high quality products and services to requests from customers of all types: both those outside the organization and those within the organization.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Provides an unacceptable level of customer service.

MARGINAL

Occasionally does not meet customer needs; sometimes indifferent in dealing with customers; occasionally rude or inaccurate in the dispensing of information or in providing service; sometimes does not take the customer's perspective into consideration.

SUCCESSFUL

Shows proficiency in areas relating to customer service by providing polite, accurate and timely information in response to customer requests; informs and educates customer regarding available alternatives where they exist; uses customer feedback to improve customer service; establishes positive relationships with internal and external customers; focuses on service quality within everyday activities and tasks; demonstrates to other persons or departments how the services of the organization can support their needs; expresses the importance of maintaining a customer-focused mindset.

EXCEPTIONAL

Provides customer services that exceeds the requirements of the position and consistently projects an exceptional image to customers; remains calm and courteous with difficult customers; explains information in a manner focused on the customer's perspective and level of knowledge; has a track record of maintaining excellent relations with customers.

OUTSTANDING

Far exceeds customer expectations by anticipating needs and proactively making recommendations; actively and frequently seeks feedback from customers to identify ways to continuously improve customer service; establishes highly effective relationships of trust and collaboration with new and ongoing customers; works to eliminate barriers that interfere with providing outstanding customer service; fosters a customer-focused climate by constantly challenging others to "think like a customer" and provides internal and external customers with the highest levels of service; highest achievement possible, being an exemplary benchmark performer.

Definition: The ability to identify the relevant facts in a situation, arrive at one or more viable solutions and recommend a course of action in a timely manner.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Work-related decisions or problems remain unsolved or unaddressed; does not make the effort to think of new ideas for future change; frequently makes unwise decisions that reflect an undeveloped understanding of problems and outcomes and of the organization's vision.

MARGINAL

Decisions are more reactive than thought out; sometimes may be short-sighted in problem solving; focuses primarily on short-range, day-to-day issues; sometimes does not consider the impact and risks of decisions on individuals and operating units; lacks broad perspective. Judgments are many times not customer focused; inconsistencies occur in the positive outcomes of decisions.

SUCCESSFUL

Makes effective decisions regarding routine problems using appropriate resources as needed. Able to stand apart from day-to-day activities and focus on broader issues when necessary; usually aware of risks and impacts of decisions on individuals and operating units; thinks of and considers possible future change.

EXCEPTIONAL

Decisions are clear-cut; makes excellent, workable decisions quickly; foresees potential problems. Proactively anticipates and addresses concerns of employees, peers, and customers; considers the total organization when making decisions; provides well-considered solutions and can be counted on to make very good decisions; has developed a broad view of the organization and is good at identifying threats to and opportunities for the organization; is capable of translating mission statements into effective action plans; provides a clear, customer-focused sense of direction for the department.

OUTSTANDING

Continually makes outstanding decisions even under extreme pressure; decisions consistently reflect excellent judgment; others look to this employee for guidance in decision making; keeps the organization's long-term goals in mind when addressing short-term issues and problems; effectively identifies innovative and fiscally sound business strategies that work for the organization on both value and cost. Benchmark performance to which others should aspire.

NOTE: The rating scale for this Dimension is based on the presumption that the employee has been provided with proper training, supplies, equipment, etc.

Definition: The extent to which the employee pays attention to and accurately follows oral and written instructions from legitimate sources; must be supervised or monitored; and seeks supervisory approval before deviating from established procedures.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Often fails to follow instructions; requires constant supervision and coaching.

MARGINAL

Sometimes does not follow routine instructions; requires more than normal amount of supervision to follow non-standard or complex instructions; sometimes deviates from established procedures without informing the supervisor.

SUCCESSFUL

Follows routine instructions with the normal amount of supervision and coaching; requires a normal amount of supervision to follow non-standard or complex instructions; consistently seeks approval from supervisor when deviating from established schedules.

EXCEPTIONAL

Follows instructions with a minimal level of supervision or coaching; requires little supervision to follow non-standard or complex instructions; deviations from established procedures are always approved by supervisor.

OUTSTANDING

Always follows all routine instructions with no supervision or coaching; follows non-standard and complex instructions without supervision and coaching; can be counted on at all times to execute even complex instructions with precision in the absence of the supervisor.

Definition: The manner in which the employee responds emotionally and verbally to the public, other employees, and supervisors. This Dimension also relates to the image the employee projects and includes cleanliness and personal grooming.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Often confrontational, temperamental, or argumentative with coworkers, members of the public, or supervisors; frequently untidy and careless in appearance; image projected is habitually unprofessional and a discredit to the department.

MARGINAL

Occasionally unfriendly with coworkers, members of the public, or supervisors; sometimes shows temper; appearance is sometimes untidy and careless and from time to time projects an unprofessional image.

SUCCESSFUL

Friendly, courteous, and tactful with coworkers, members of the public, and supervisors; willing to help others; rarely shows temper; appearance is neat and projects an acceptably professional image.

EXCEPTIONAL

Very friendly and outgoing with coworkers, members of the public, and supervisors; usually shows genuine concern for, is very polite towards, and is willing to help others; rarely shows temper; develops and maintains interpersonal relationships that are congenial and promote efficient functioning; maintains tactfulness and is patient; appearance is very neat; projects a very professional image.

OUTSTANDING

Always outgoing and extremely friendly with coworkers, members of the public, and supervisors; always shows genuine concern for and is willing to help others; exemplary employee in establishing goodwill; never shows temper; appearance is consistently very neat; always projects a professional image that is a model for other employees.

CUSTOM

JOB EFFORT

CUSTOM

Definition: The effort the employee puts into job duties, group meetings, and training classes; the willingness to contribute ideas and actions without being prompted or instructed to do so; the willingness to adapt to changes.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Frequently requires prompting to complete job tasks; resists changes; resists training.

MARGINAL

Occasionally neglects work that he/she is not interested in; sometimes requires significant prompting to complete job tasks; sometimes resists changes; occasionally resists training.

SUCCESSFUL

Requires minimal prompting to complete job tasks; looks for ways to accept additional responsibilities; receptive to change and training.

EXCEPTIONAL

Rarely requires prompting to complete job tasks; frequently looks for ways to accept additional responsibilities; is highly receptive to change; consistently takes advantage of training opportunities.

OUTSTANDING

Does not require prompting to complete job tasks; consistently assumes responsibility for making own job or unit the best; always highly receptive to change and suggests additional changes; always takes advantage of training opportunities and engages in self-study; highest level of job effort possible.

Definition: The extent to which the employee demonstrates knowledge of job-related terms, procedures, and underlying principles.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Lacks basic understanding of job duties, procedures or functions of the organization despite training; fails to keep up-to-date on services provided by department; demonstrates little interest in increasing knowledge level; cannot be counted on to perform job well.

MARGINAL

Knowledge of job duties and procedures is sometimes inadequate despite coaching and training; frequent instruction and assistance are needed; uninformed about some aspects of own job and frequently must ask repeated questions of others.

SUCCESSFUL

Possesses good technical, administrative, or other specialized knowledge required to perform job well; demonstrates desire to increase knowledge of department operations outside of own job; applies job knowledge effectively to practical situations.

EXCEPTIONAL

Understands and knows very well all phases of work; very knowledgeable about principles and practices of subject matter related to job; other employees come to this level of employee when they have job-related questions.

OUTSTANDING

The top-notch resource person often sought out by others to learn and understand procedures and policies; knowledge of many job-related topics far exceeds what is expected; considered by most workers to be “the expert” on job-related topics.

NOTE: This Dimension applies to jobs which require supervision of other supervisors and/or coordination and oversight of major projects.

Definition: The degree to which the employee gets the work done; exhibits skill in planning, scheduling, and delegating work; exhibits skill in coordinating activities and anticipating problems.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Fails to meet reasonable deadlines; is very disorganized; plans poorly; consistently fails to anticipate common problems; fails to handle changes in plans adequately; delegates tasks improperly.

MARGINAL

Often does not meet reasonable deadlines; occasionally is disorganized; occasionally plans poorly; inconsistently anticipates common problems; occasionally does not handle changes in plans adequately; sometimes does not delegate tasks properly.

SUCCESSFUL

Meets reasonable deadlines; organized; plans adequately; anticipates common problems; handles changes in plans adequately; delegates tasks properly.

EXCEPTIONAL

Almost always completes work before deadlines; is frequently very well organized; consistently exhibits exceptional planning skills; anticipates both common and unusual problems; excellent at motivating subordinates; consistently delegates meaningful tasks to subordinates according to a plan.

OUTSTANDING

Always completes work before deadlines; is always very well organized; exhibits outstanding planning skills; always anticipates both common and unusual problems; always delegates tasks according to individual strengths and deadlines. Benchmark performance; others can rely on this person to do outstanding work managing any project at any time.

Definition: The ability to express ideas, information, and/or instructions clearly and concisely through speech and non-verbal communication; the extent to which spoken presentations promote audience attention, understanding and retention; the willingness and ability to listen attentively to others.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Does not speak clearly; speech is consistently misunderstood due to problems such as poor grammar, slang, mumbling or interjecting "ahs" and "ums"; ignores, misuses or misinterprets non-verbal communication; ignores others when they speak.

MARGINAL

Usually speaks clearly; however, speech is occasionally misunderstood due to problems such as poor grammar, slang, mumbling or interjecting "ahs" and "ums"; a fair understanding and use of non-verbal communication; occasionally is not a good listener.

SUCCESSFUL

Displays proficient ability in speaking clearly; speech is consistently understood; communicates and appropriately makes known his/her point of view; proficiently uses and understands non-verbal communication; is a good listener.

EXCEPTIONAL

Displays a higher than normal ability in speaking clearly and confidently in a concise and well organized manner; exceptional skills in counseling, informing, public speaking, debating issues, settling disputes or conducting difficult interviews; very perceptive of non-verbal communication and is highly skilled in its use; is always a good listener.

OUTSTANDING

Possesses the highest capability and is exemplary in articulating views and ideas to be understood by a wide variety of audiences; always gives outstanding speeches, lectures, or presentations; always picks-up on even the slightest of non-verbal cues and is extremely skilled in their use; is always an outstanding listener. Sets the standard in oral communication such that others attempt to emulate this individual's skill.

NOTE: This Dimension applies only to employees who were active “Raters”, as defined in the Civil Service Classified Employee Performance Management Process, during some or all of the current Review Period.

Definition: The degree to which the employee implements the Performance Management Process willingly and according to established rules and guidelines.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Conducts required meetings late; usually does not define subordinate job duties or performance expectations; usually does not document subordinate job performance; substandard use of Dimension rating scales in evaluating job performance; usually does not complete “Comments” section without prompting and comments are very general; submits paperwork late.

MARGINAL

Occasionally conducts required meetings late or not at all such as the Planning, Mid-Term or End-of-Term meetings; inconsistently defines and documents only very general subordinate job duties; job performance documentation in “Comments” section is occasionally too general and/or fails to note positives; is occasionally too subjective in evaluating job performance; occasionally submits paperwork late.

SUCCESSFUL

Conducts required meetings in a timely manner; does a good job of clearly defining and documenting subordinate job duties; job performance documentation in "Comments" section is specific and captures both positive and negative examples of job performance; shows objectivity in evaluating job performance; submits paperwork in a timely manner.

EXCEPTIONAL

Always conducts required meetings in a timely manner; always displays excellence in clearly defining and documenting subordinate job duties; always sets job-related subordinate goals; job performance documentation in "Comments" section is markedly above average in its specificity and coverage of both positive and negative examples of job performance; always shows excellent objectivity in evaluating job performance; always submits paperwork in a timely manner.

OUTSTANDING

In addition to everything listed under “Exceptional,” exemplary use of performance management as a motivational tool; always ties subordinate goals to organizational goals; expertly uses coaching cards and consistently meets with subordinates regarding their job performance; continually works in contributing to the improvement of the performance management process.

Definition: The extent to which the employee follows standard office procedures and County rules/policies and safety policies/procedures; willingness to work overtime and accept temporary duty assignments.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Ignores or refuses to follow established rules and procedures; on various occasions resists working mandatory overtime and/or temporary duty assignments; fails to incorporate safety considerations into work.

MARGINAL

Sometimes does not conform to established rules and procedures; occasionally resists working mandatory overtime and/or temporary duty assignments; requires occasional reminders concerning safety considerations.

SUCCESSFUL

Conforms to established rules and procedures willingly; is willing to work mandatory overtime and/or temporary duty assignments; does an adequate job of incorporating safety considerations into work.

EXCEPTIONAL

Almost always conforms to established rules and procedures in a very cooperative manner; almost always is willing and enthusiastic about working mandatory overtime and/or temporary duty assignments; almost always does an adequate job of incorporating safety considerations into work.

OUTSTANDING

Always conforms to established rules and procedures in a very cooperative manner; is always willing and enthusiastic about working overtime and/or temporary duty assignments; always does an outstanding job of incorporating safety considerations into work; exemplary benchmark employee.

Definition: Extent to which employee follows safety procedures; meets standards for frequency, severity, and at-fault status of vehicle accidents, other accidents, and injuries of all types; participates in identifying and resolving causal factors for accidents; participates in promoting safety on the job.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Fails to follow safety procedures; frequency or severity of at-fault accidents does not meet safety standards; does not participate in identifying and resolving causal factors for accident conditions.

MARGINAL

Inconsistently follows safety procedures; occasionally does not meet standards regarding accidents and injuries; occasionally does not participate in identifying and resolving causal factors for accident conditions.

SUCCESSFUL

Follows safety procedures; meets standards regarding accidents and injuries; contributes to identifying and resolving causal factors for accident conditions; promotes safety on the job.

EXCEPTIONAL

Always follows safety procedures; almost always exceeds minimum standards regarding accidents and injuries; almost always contributes in identifying and resolving causal factors for accident conditions; an advocate in promoting safety on the job.

OUTSTANDING

Always follows safety procedures; time and again exceeds standards regarding accidents and injuries; always offers substantive thoughts and ideas in resolving causal factors for accident conditions; is always active in promoting safety on the job; motivates others in safety awareness; is an exemplary leader in actively promoting safety and resolving safety issues.

Definition: The degree to which the employee provides initial job orientation to subordinates; coaches subordinates to improve current job performance and to develop themselves for promotional opportunities; accomplishes desired results through subordinates; delegates assignments appropriately; ensures equal opportunities for training.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Provides little or no job information to new employees; plays favorites; delegates randomly or not at all; does little to develop employees using effective coaching or training techniques.

MARGINAL

Sometimes fails to provide new employees with an adequate job orientation; occasionally has problems communicating with employees; occasionally gets too involved in details or fails to delegate appropriately; inconsistently provides coaching or training.

SUCCESSFUL

Provides new employees with an adequate job orientation; is a proficient and competent job performance coach; accomplishes desired results through subordinates; delegates work properly; ensures that subordinates take advantage of training opportunities.

EXCEPTIONAL

Almost always provides new employees with a very thorough job orientation; always a very good job performance coach; achieves desired results through subordinates; uses delegation to challenge and develop employees; almost always ensures that subordinates take advantage of training opportunities.

OUTSTANDING

Always provides new employees with a very thorough and exemplar job orientation; always displays excellence as a job performance coach; always achieves desired results through subordinates, usually surpassing intended outcome levels; inspires the highest level of loyalty and devotion among employees possible; always ensures that subordinates take advantage of training opportunities.

STANDARD

TEAM WORK

STANDARD

Definition: The degree to which the employee works with other team members to achieve group goals by contributing ideas in group settings, accepting ideas contributed by others, operating within team rules, participating in team activities (such as meetings), working with team members to improve job knowledge and skills, putting team goals over personal goals, and supporting team leaders once decisions are made.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Works poorly with other team members; places own goals ahead of team's when the two conflict; needs immediate development in being a "team player".

MARGINAL

Occasionally works poorly with other team members; occasionally places own goals ahead of team's when the two conflict; is an inconsistent "team player".

SUCCESSFUL

Works well with other team members; places team goals ahead of own when the two conflict; is a good "team player".

EXCEPTIONAL

Almost always works exceptionally well with other team members; almost always places team goals ahead of own when the two conflict; is an excellent "team player".

OUTSTANDING

Always works exceptionally well with other team members; always places team goals ahead of own when the two conflict; is an exemplary "team player". Others enjoy working with this employee and request this employee's presence on their teams.

Definition: The speed and accuracy with which the employee uses a typewriter or word processor to produce written material quickly and accurately; uses a keypad or keyboard to quickly and accurately enter numeric and alphanumeric data.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Speed is slow; work is late, contains many errors or is incomplete; work quality is below position requirements.

MARGINAL

Speed is sometimes slower than the minimum requirements of the position; work is occasionally late, contains some errors, and is typically incomplete.

SUCCESSFUL

Speed meets the minimum requirements of the position; work is on-time, acceptably accurate, complete and is at a sufficient level of proficiency.

EXCEPTIONAL

Speed is almost always faster than successful benchmark; work is almost always completed ahead-of-time, very accurate, and displays a high level of excellence; almost always handles rush jobs with little, if any, impact on regular work load; work looks neat and professional; almost always able to prepare tables, figures or other formats that require extra knowledge, time and effort.

OUTSTANDING

Speed is always exceedingly faster than what position requires; work is almost always completed ahead-of-time, very accurate, and is exemplary; is called upon to type/input the most difficult and/or critical materials; displays excellence in typing/entering data under stressful conditions and when a rush job is required; always able to prepare tables, figures or other formats that require extra knowledge, time and effort.

CUSTOM

WORK QUALITY

CUSTOM

Definition: The degree of skill exhibited by the employee in work products; the accuracy, thoroughness and neatness of work performed.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Work quality is consistently less than acceptable on first submission.

MARGINAL

Work quality is usually less than acceptable on first submission.

SUCCESSFUL

Work quality is usually acceptable on first submission; work is usually neat and complete.

EXCEPTIONAL

Work quality is usually above average on first submission.

OUTSTANDING

Work quality is consistently above average on first submission; work is the best in terms of accuracy, thoroughness, and attention to quality details.

CUSTOM

WORK QUANTITY

CUSTOM

Definition: The amount of work the employee produces within a fixed amount of time and within quality tolerance standards.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Volume and output of work is typically lower than the minimum position requirements; works slowly and accomplishes little.

MARGINAL

Overall volume of work accomplished is inconsistent in relation to meeting the successful volume standards required of the position; occasionally works slower and accomplishes less than is required.

SUCCESSFUL

Volume of work accomplished is consistent with position requirements and produced in a proficient amount of time.

EXCEPTIONAL

Volume of work accomplished almost always exceeds the minimum position requirements and is almost always produced more quickly than average.

OUTSTANDING

Volume of work accomplished time and again far exceeds minimum position requirements and is always produced much more quickly than the minimum standard.

Definition: The extent to which the employee expresses ideas, information, and/or instructions clearly and concisely in writing; the extent to which writing is understood by the intended audience; the extent to which the rules of grammar, punctuation, spelling and sentence structure are followed.

RATING SCALE

Rating

Definition

UNSATISFACTORY

Writes in an unclear and unorganized manner; intended message is misunderstood by most members of the audience; does not follow rules of grammar, etc.

MARGINAL

Sometimes writes in a clear and organized manner but occasionally falls below position standards; intended message occasionally is not understood by most members of intended audience; often does not follow rules of grammar, etc.

SUCCESSFUL

Writes in a clear and concise manner; intended message is regularly understood by most members of intended audience; does a capable job of following rules of grammar, punctuation, spelling and sentence structure.

EXCEPTIONAL

Almost always writes in a very clear and concise manner; intended message is almost always understood by most members of intended audience; almost always displays excellence in following rules of grammar, etc.

OUTSTANDING

Always writes in a very clear and concise manner; intended message is always understood by all members of intended audience; always does an exemplary job of following rules of grammar, etc. Benchmark performance in writing skill; others aspire to this level of competence in written communication.

GLOSSARY

NOTE: TERMS ARE DEFINED AS THEY RELATE TO JOB PERFORMANCE.

AGENCY - any commission, board, elected official's organization, or other unit of County Government which is not a subdivision of a larger unit of County Government.

AGENCY HEAD - the individual whose administrative authority supersedes that of all other individual's within an Agency.

CLASSIFICATION - a group of positions with similar job duties. Under the County Civil Service System all positions in the same classification have the same formal title (e.g. Clerk II).

CLASSIFIED EMPLOYEE - a permanent employee whose position is subject to the rights contained in the County Civil Service Board Law and Rules.

COACHING - communication from the Rater to the employee having two basic components:
1) it concerns job performance and 2) it is supportive, positive, or constructive in nature.

COACHING CARD - a form used to document job performance observations.

CRITERIA - measures of job behavior. May range from subjective (poor definition of job behavior such as "good employee") to objective (clear definition of job behavior such as counts of work produced). Dimension rating scales are good examples.

CUSTOM DIMENSION - performance Dimension which should be used to rate job performance only for those job's to which it is relevant.

DELEGATE - an individual who has been given the authority to act on behalf of and independently of someone higher in the organization.

DIMENSION - see Performance Dimension.

DOCUMENTATION - written observations of job performance and the related circumstances.

EMPLOYEE - a person legally occupying a position in either the classified or exempt service.

EMPLOYEE REVIEW/PLANNING MEETING - a meeting between the Rater and employee held at the very end of the Performance Review Period to review Rater and Agency Head comments, ask questions, and move forward into the next Performance Review Period..

END-OF-TERM MEETING - a required meeting between the Rater and employee held one month prior to the end of the Performance Review Period to discuss job performance.

EXCEPTIONAL - see individual Dimension Rating Scales in Attachment D.

FEEDBACK - job performance evaluation information provided by Raters to employees.

JOB - a group of tasks normally accomplished by a single person. See Position.

JOB PERFORMANCE - what people do and say at work.

MARGINAL - see individual Dimension Rating Scales in Attachment D.

MANDATORY DIMENSIONS - See "Standard Dimension."

MID-TERM MEETING - a required meeting between Rater and employee held at the midpoint of the Performance Review Period to discuss job performance.

OBJECTIVE - not open to opinion. Based on direct observation or counting of events.

OBSERVATION - paying attention to employee job performance or the results of job performance.

OPTIONAL DIMENSION - See "Custom Dimension."

OUTSTANDING - see individual Dimension Rating Scales in Attachment D.

OVERALL PERFORMANCE RATING - a single performance rating which summarizes an employee's performance throughout a Performance Review Period. A combination of individual Dimension ratings.

PAY INCREASE MEETING - see "Employee Review/Planning Meeting."

PAY INCREASE PERCENTAGE - the percentage pay increase awarded to an employee based on his/her Overall Performance Rating.

PERFORMANCE DIMENSION - a group of related job behaviors.

PERFORMANCE INCREASE - see Pay Increase Percentage.

PERFORMANCE MANAGEMENT - the process of observing, identifying, measuring and developing job performance in organizations.

PERFORMANCE PLANNING MEETING - a formal meeting held at the beginning of the Performance Review Period where the employee and Rater agree upon Dimensions to be rated during the upcoming period.

PERFORMANCE REPORT - the formal, required form used to document each classified employee's job performance during each Performance Review Period.

PERFORMANCE REVIEW DATE - the date that a Performance Review Period ends.

PERFORMANCE REVIEW PERIOD - the time between Performance Review Dates during which an employee's job performance is observed and evaluated. Normally a one year period. A six month period for recently hired (Initial Probation) or recently promoted or demoted (Conditional Probation) employees.

POSITION - a single job. Usually filled by a single person.

POSITION DESCRIPTION - a description of the job duties & responsibilities associated with a single job.

PRIORITY RATING - a value assigned to a Performance Dimension which indicates importance to the job as compared to other Dimensions.

RATER - the person who observes and directs the day-to-day job performance of a classified employee. Also the individual with primary responsibility for completion of the Performance Report for an employee. May be a lead person providing work direction.

RATING ERRORS - errors made by a Rater when evaluating the job performance of an employee.

RATING RESPONSE FORM - a mandatory form completed by employees to indicate areas of agreement/disagreement with final job performance ratings.

REVIEWER - The Rater of the Rater.

SALARY INCREASE PERCENTAGE - see Pay Increase Percentage.

SELF-EVALUATION REPORT - a form used by employees to rate their own job performance.

STANDARD DIMENSIONS - Performance Dimensions which every employee must be rated on.

SUBJECTIVE - open to opinion, not based on direct observation or counting of events.

SUCCESSFUL - see individual Dimension Rating Scales in Attachment D.

TASK - a specific group of behaviors performed on the job.

UNSATISFACTORY - see individual Dimension Rating Scales in Attachment D.