

## Employee Self-Evaluation Exercise

### Employee Scenario - Olivia:

Olivia is an administrative assistant and has worked for the County for 8 years. While Olivia's performance has typically met expectations across the board, this past calendar year some challenges have surfaced. Performance evaluations will soon be due and Olivia's supervisor has requested that she complete her self-rating for the evaluation process. After you read through the following scenario, decide how Olivia should rate herself in each section of the County's performance evaluation.

Olivia has always had a way with clients who come to the service window. She listens carefully to customer requests and goes out of her way to help them reach a resolution. When the department can't provide the customer what they want and the answer needs to be "no," Olivia describes alternatives for consideration or ensures the customer knows what steps to take next if there is another agency that can assist with their request. Olivia consistently provides expert guidance on a wide variety of client questions in keeping with department policies and regulations. When she is working at the front counter, higher level staff rarely need to be called to assist because she is so well versed in the department's programs. Several times during the past year, Olivia has skillfully handled difficult and volatile customer interactions where she was able to calm the individual and redirect their focus to the business at hand.

In one situation which stands out, Olivia made the call to step back from the counter and involved a manager in dealing with a particularly angry citizen. This situation escalated and when the customer started slamming his fist down on the counter, yelling, and threatening to come back into the department staff area "to deal with the problem," Olivia promptly called security - and the security officer needed to escort the citizen out of the building.

Unfortunately, Olivia's interactions with other County employees outside the department have created some concern in the organization. Olivia will admit that she has snapped at employees who needed to request reports when she was feeling really stressed by her high workload - or simply failed to provide the material on time and avoided making contact with the requestor about this. During a particularly busy week, James came to her requesting reports for auditors who were on-site. Olivia informed him she was too busy this week to complete the reports....and later heard from James' manager directing her to move these reports to the top of the priority list. Olivia got the information over to them, but it was a day later than they wanted it and Olivia was bothered by the interference. Olivia's manager brought these issues up at their one-on-one meeting in May and conveyed expectations for improved customer service. Olivia made efforts to implement these directives, but by late June and July, there were a few more times when Olivia's patience just reached the limit with all these report requests coming in at the same time. Olivia feels the current request system just isn't very helpful to her in prioritizing requests, so it seems like internal customers from other County departments are often unhappy about report turnaround times. Finding herself stressed by this part of the job, Olivia tends to take it out on the internal customers requesting the reports.

Olivia prides herself on pulling together very accurate reports and using the department's technology to the fullest to create customized reports to meet other departments' needs. She just feels that no one appreciates the effort she puts into this, and she knows others are complaining about her interactions with neighboring department staff.

Olivia's job is a grade 6 and she doesn't take a clear leadership role in the department. Other staff members head up meetings and lead the department's project initiatives. Olivia is not sure how the "leadership" category of the County's performance evaluation applies to her as an administrative assistant.

Olivia has normally produced high quality and a high quantity of work – and she knows at least the first part of this year is no exception. She is skilled at using the computer systems in her area and can quickly produce reports including complex queries and custom reporting. She prides herself on the final product always being formatted nicely and the information accurate. Her computer skills far exceed what is needed for the position and as a result, in addition to completing her regular duties, Olivia has initiated some new electronic forms and tracking spreadsheets which have streamlined work for all the other staff in the division. Without even being asked by her supervisor, Olivia noticed the frustration staff was experiencing with some complex processes, and worked with them to create these new electronic tools which have really tightened up the workflow. Olivia feels she has really gone above and beyond with taking this initiative and contributing her skills at a level higher than what was expected.

In September, Olivia informed her supervisor that she needed 5 weeks of FMLA medical leave. When the 5 weeks were up, Olivia's doctor didn't give her the release to return to work that she expected – and she had to submit a new doctor note indicating she would require an additional 4 weeks off. Since her return to work in late November, Olivia has been struggling with errors in her work. Incorrect calculations have slipped through and sometimes the reports requested have included the wrong data. There was even an incident where a PowerPoint presentation for the Board, which Olivia regularly prepares for her supervisor, contained incorrect numbers - and this came to light while her supervisor was in the middle of the presentation at the Board meeting in December. Since Olivia is usually very conscientious about the accuracy of her work, she was really upset when she learned about this issue.

In Olivia's defense, there has been a lot of catch-up work after her leave and she feels that she has gotten a long list of overdue reporting requests out of the way. However, despite the incredible efforts put into addressing the work that piled up during her leave, she will still be finishing out the year with a backlog of work in her area. Although she's starting to get that back on track, she knows she's been making more errors in her work in November and December and is worried that the timing of these issues so close to her annual review are going to pull down her ratings. She wonders if there is a good way to address this with her supervisor...

*Decide how Olivia should reflect her performance in her self-evaluation and select the most appropriate ratings for each category.*

*How can Olivia engage in positive and productive communication with her supervisor regarding the challenges she has faced this year?*

**Performance Evaluation:**

**Rate Olivia on the County's six competencies and determine her "overall rating" score. Include comments for each area as time permits.**

**1. Customer Service & External Communications / Rating: \_\_\_\_\_**

Provides quality service to customers. Interacts with customers in a professional, respectful, helpful and effective manner. Responds to customers in a timely manner. Listens respectfully and ensures understanding. Demonstrates a positive image as a County representative. Maintains good working relationships with customers and anticipates their needs.

**2. Leadership / Rating: \_\_\_\_\_**

Inspires others to achieve results, promoting involvement, participation and teamwork. Serves as an appropriate role model and projects a positive, encouraging, enthusiastic image. Provides constructive criticism in a helpful and confidential manner. Takes charge willingly and is accountable. Conducts and/or participates in performance evaluations in a timely manner.

**3. Teamwork & Internal Communications / Rating: \_\_\_\_\_**

Works collaboratively with groups of people in order to achieve a goal. Builds and maintains effective work relationships. Understands work procedures and the relationship of their work and impact on others. Is flexible and willing to compromise to achieve group consensus. Expresses ideas, concerns, and concepts clearly so that they are easily understood. Shares information and ideas proactively, appropriately and respectfully.

**4. Productivity / Rating: \_\_\_\_\_**

Completes an appropriate amount of work. Produces high quality work that is thorough, accurate and complete within established deadlines. Plans, organizes, and carries out work effectively. Exerts extra effort willingly when necessary to get the job done. Drives to start projects/tasks and sees them through. Uses time wisely and efficiently. Is regularly prepared for work at starting time, returns from breaks in a timely manner, and arrives at meetings, appointments, assignments on time. Does not abuse/misuse leave benefits or privileges.

**5. Decision Making / Rating: \_\_\_\_\_**

Considers alternatives, possible results and impacts before making decisions. Takes problem solving actions and then follows through to insure improvement. Exercises sound judgment. Takes appropriate and acceptable risks. Demonstrates creativity and ingenuity in developing and improving work methods and results. Performs job duties as governed by policies, procedures, rules, regulations, and law. Conducts work in a safe manner. Recognizes, avoids, and prevents safety and health hazards in workplaces. Uses appropriate safety equipment and follows safety regulations.

**6. Job Knowledge & Application of Skills / Rating:** \_\_\_\_\_  
Essential Duties, Job Knowledge and Application of Skills as defined by the Class Specification, Job Description and/or work assignments.

**Overall Performance Rating:** \_\_\_\_\_