**Olivia - Performance Evaluation Exercise for Supervisors**

**Employee Scenario - Olivia:**

Olivia is the administrative assistant for your department 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. As you sit down to complete Olivia’s annual performance evaluation, you review the notes in your desk file and think back on the events of the last year….

Olivia has always had a way with clients who come to your 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, you observed Olivia skillfully handle 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 and threatening to come back into the department, Olivia promptly called security who needed to escort the citizen out of the building.

Unfortunately, you have heard that Olivia’s interactions with other County employees outside your department have created some concern. While you haven’t observed any of these interactions directly, a couple of other department managers told you that Olivia snapped at employees who needed to request some reports or blew them off and didn’t provide the material on time. One manager sent you an email stating “Olivia told James she was too busy this week to complete the special report he requested. This information was needed to respond to auditors. I finally had to get involved and tell her to get the job done - and even then, we received the information a day late!” You locate a note documenting a discussion you had with Olivia about this in May. It seemed like the situation improved for a while…but by July you had an email from another department liaison asking if she could work with someone else in your area to get routine reports delivered. One of your staff members told you that Olivia had been argumentative with a department head, and another manager told you Olivia seemed pretty short with her staff anytime they needed to request a customized report, although the work delivered was always accurate and met their needs.

Olivia’s job is a grade 6 and she doesn’t take an obvious leadership role in your division. She doesn’t head up any meetings or initiatives like your other staff members whose positions require a higher level of responsibility in this area. You’re not sure you have anything in your desk file on Olivia that really applies to the “leadership” category of the County’s performance evaluation.

You’ve always been impressed with the high quality and quantity of work Olivia produces. She is highly skilled at using the computer systems in your area and can quickly produce reports including complex queries and custom reporting. The final product is always formatted nicely and information is 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 your division. You didn’t even request this, but Olivia just noticed the frustration staff within your department was experiencing with some complex processes, and worked with line staff to create these new electronic tools which have really tightened up the workflow.

In September, Olivia informed you she needed 5 weeks of FMLA medical leave. This really set the department back. When the return to work date rolled around, Olivia submitted a new doctor note indicating she would require an additional 4 weeks off. Since her return to work in late November, you’ve noted a number of errors in Olivia’s work. Calculations have been incorrect and sometimes the reports you’ve requested have included the wrong data. There was even an incident where a PowerPoint presentation for the Board, which Olivia regularly prepares with direction from you, contained incorrect numbers and you didn’t notice until you were at the podium! Since Olivia has been creating these presentation slides for years and has always demonstrated great attention to detail in the past, you don’t normally take the time to proof her work - so this created quite an embarrassing situation for you during your presentation in December.

In Olivia’s defense, there has been a lot of catch-up work after her leave and she’s gotten a long list of overdue reporting requests back on schedule. You’re concerned about this recent change in work quality however, and you wonder if it has something to do with Olivia’s medical condition and might be a problem going forward - or if it’s just a result of working too fast to catch up. Olivia is finishing out the year with a backlog of work in her area, although she’s starting to get that back on track – but her work is also filled with errors and inconsistencies based on what you’ve seen from late-November through December. You wish you had a little more time to evaluate this change in work quality, but now is the eleventh hour and it’s time to complete her annual performance evaluation……

**Annual Performance Evaluation:**

**Rate Olivia on the County’s five competencies and determine her “overall rating” score.**

**Include comments for each area as time permits.**

1. **Customer Service & Communication / Rating: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**

Provides quality service to customers. Interacts with customers in a professional, respectful, helpful and effective manner. Responds to customers in a timely manner. Maintains good working relationships with customers, anticipates their needs, and works to find solutions. Works collaboratively with groups of people at all levels in order to achieve a goal. Builds and maintains effective and professional work relationships and supports effective teamwork. Expresses ideas, concerns, and concepts clearly so that they are understood. Shares information and ideas proactively, appropriately and respectfully.

1. **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.

1. **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.

1. **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.

1. **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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**