**Employee Performance Evaluation Rating Exercise for Supervisors**

**Employee Scenario - Jack:**

Jack is a mid-level professional in your department who regularly performs fieldwork in the community, as well as complex technical work in the office. Jack’s position and duties provide significant latitude for independent operation and decision making, which Jack routinely handles with ease. During his three years of employment with the County, he has proven himself to be skilled technically, and a highly effective staff member who knows how to prioritize and balance a demanding workload. If every employee on your team could complete the amount of work that Jack independently accomplishes in a week, you could probably turn all your attention to special projects and would hardly need to worry about the hands-on supervision and staff guidance that typically consume your days.

As you review your supervisory file documenting Jack’s performance and achievements throughout the year, you pause over notes on the cross-departmental project in which Jack played a key role during second quarter. When the project was announced to your team, Jack quickly volunteered to join the initiative and immediately picked up on the objective to streamline exchange of information between the two departments involved, through implementation of a new technology system. His problem-solving skill and technical expertise made Jack a standout contributor on the project team. In addition, he took on a large portion of the system configuration and testing, working extra hours to ensure your department could capitalize on the new technology investment. Jack pushed the system vendor during implementation to secure enhancements that would benefit the County as well as other users, resulting in a highly successful implementation.

Most of your monthly one-on-one meetings with Jack reflect reports of positive accomplishments including impressive stats on workload completion (well above average compared to team members who have been doing the job for many more years), discussion of unique challenges that have arisen and the work Jack completed to research and recommend solutions, in addition to reports on Jack’s progress in developing technical reporting capabilities that will benefit the department exponentially.

Several emails from community members Jack interacted with during the year are included in your file, complementing his positive engagement and ability to clearly convey knowledge and expertise that helped guide individuals to the information they needed. Another message from a County Commissioner commends your department on a project Jack completed almost single-handedly, connecting the public to new resources via the County’s website.

Paging through additional notes in your file, you are reminded of several issues you’d prefer to overlook. On several occasions, Jack became argumentative with another coworker, Nolan. In one incident, it turned out Nolan had dropped the ball on his portion of data conversion work for the new technology system. Everyone knew it was a problem, but Jack lost his cool and swore at Nolan, describing him with some choice words that required a closed-door discussion with Jack afterward, along with an assignment to review the County’s Respectful Workplace Policy.

About a month later, there was another incident in which Jack apparently became impatient with Nolan’s progress and rather than checking in with Nolan directly to discuss an agreeable completion date for his portion of the work (or bringing his concerns to management overseeing project assignments), Jack decided to stay late one night and without telling anyone, completed the entire set of requirements assigned to Nolan. The work was done well, and everyone moved on from it, but you had to discuss with Jack that there were better options for handling the situation. (Jack doesn’t know that Nolan is on a Performance Improvement Plan, and his unauthorized take-over of Nolan’s assignment actually interfered with management’s ability to determine if Nolan would follow through to successfully complete his portion of the project.)

Then there were a few issues with Jack making sharp remarks toward other team members who were struggling to catch on to new procedures during a third quarter training session. This wasn’t the first time Jack expressed his frustration with others needing to take things more slowly or ask questions about information that was presented. Typically, Jack’s displeasure was only apparent through body language or subtle comments at team meetings. While new concepts and processes come easily for Jack, he often lacks empathy and patience for those who fail to match his quick pace. If Jack could just recognize how improving his soft skills would change the dynamics during department and project team meetings, it would go a long way. At times, it seems like others pick up on his subtle reactions and shut down, or are too intimidated to ask for clarification during group discussions. The disregard for the importance of building relationships and working effectively with team members who bring strengths in different areas, are really the only issues placing a damper on Jack’s overall success at work.

Because Jack is such a strong contributor who brings invaluable technical expertise and carries far more than his share of the workload, you’ve been hesitant to include these types of concerns in prior performance evaluations. However, this year presented additional team interactions that tested Jack’s ability to problem-solve with regard to people interactions. In addition, it feels like the one-on-one coaching discussions you’ve had with Jack in follow-up to the more significant incidents maybe haven’t gotten to the root of the issue.

As you sit down to write Jack’s performance evaluation, you know this will be hard… You’ll have to carefully weigh how to best approach this situation with someone who (most days) seems to be one of your department’s top performers.

**Annual Performance Evaluation:**

**Rate Jack on the County’s five competencies and determine his “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: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_**