

9.01 Purpose

The Employee Performance Appraisal within the NEOGOV Perform System provides employees the ability to be evaluated on their performance while also offering opportunities for professional growth through goal setting and supervisor monitoring. The current system is an enhancement of tasks and performance standards approach that has been used since 1996.

Good performance appraisals benefit both employees and the organization. They promote common understanding of individual needs, work objectives and standards of acceptable performance. They also give employees and managers a useful tool to aid in employee development. The revised Employee Performance Appraisal System offers the following specific benefits:

1. Core Values measured
2. Supervisory and management skills measured
3. Standards tied to Job Description Questionnaire (JDQ)
4. Automatic calculations
5. Weighted measures

This section establishes procedures for appraising Career Service, Executive Support *and* EMS employee performance within the NEOGOV Perform System. Step-by-Step tutorials on how to complete evaluations within the NEOGOV Perform system can be found on the County Intranet site. (Process timelines will differ based on the type of appraisal being conducted.)

Senior Management employees will be assessed through self-rating and supervisor response within the NEOGOV Perform system as well on the basis of their accomplishments and continuous improvement in the areas of our Core Values as approved by the County Administrator.

9.02 Types of Appraisals

The following is a description of the types of performance appraisals:

1. **Probationary/Trial** - End of the 6 month probation or trial period.
2. **Extension of Probation Period** - At time of request for extension is approved for an additional 2 month period from the original probation end date.
3. **Annual** - Begins on June 1st of each year and due to be completed by August 1st.
4. **Special** - Beginning at end of special probation or when performance substantially dropped during a review period.
5. **Change in Classification** -Promotion/demotion/transfer, etc.

9.03 Responsibility for Appraisal

A month prior to an employee appraisal’s due date, the supervisor will receive a system generated email from the NEOGOV Perform system notifying them of their required tasks to complete. The Performance Appraisal shall be completed by the employee's immediate supervisor, be reviewed and approved by the next level Supervisor(s), and then by the Division Director (or designee); be signed by the employee; and signed by the immediate supervisor to complete the process.

9.04 Completion of the Employee Performance Appraisal

The Employee Performance Appraisal is used for the Progress Review, the Performance Appraisal, Annual Performance Pay increase determination, and Succession Planning. The directions included in the training guides on the County intranet in the Leon Learns Training Portal under the Resource Library should be followed precisely. It is required that all appraisals are complete on or before their due date.

9.04.1 The Progress Review

A Progress Review session is a meeting between the supervisor and the employee to determine, informally, the employee’s performance since the employee Future Goals were developed during the previous year’s appraisal process. The review allows the supervisor and employee to increase their level of communication concerning the employee’s ongoing performance.

When to Hold Progress Reviews

A Midpoint Progress Review should be held at least six months into the appraisal year or according to the deadlines set within the employee’s Future Goal’s section of the evaluation or development plan. However, Progress Reviews may be held more often if the supervisor notices an inadequate level of job performance. The employee may request a Progress Review if job changes occur during the appraisal period. A Special Appraisal may be conducted instead of a Progress Review.

9.04.2 Procedure: The Employee Performance Appraisal System

The performance appraisal is conducted using the following schedule:

Type of Employee	Conduct Performance Appraisal
1. <u>Career Service, Executive Support, and EMS</u> Employees hired prior to October 1 of the current fiscal year	Annually beginning June 1
2. <u>Career Service, Executive Support and EMS</u> Employees hired on or after October 1 of the current fiscal year	One hundred eighty (180) days after hire date.
3. <u>Career Service, Executive Support and EMS</u> Employee promoted, demoted, reinstated, reclassified, transitioned or transferred	One hundred eighty (180) days after position start date.
4. <u>Senior Management</u> Employees hired before April 1 of the current fiscal year	Annually beginning June 1

Prior to the Performance Appraisal Interview

- The supervisor rates each performance standard under each competency section, entering the whole number rating within the Employee Performance Appraisal in the NEOGOV Perform System as follows:

- 0 = Unacceptable
- 1 = Development Needed
- 2 = Fully Competent
- 3 = Exceeds Expectations
- 4 = Outstanding
- 5 = WOW

The supervisor provides justification for the performance level chosen in the comments section of each competency. Justification is required for any area rated a zero (0) or a five (5).

The supervisor should document performance throughout the appraisal period, keeping written records of employee accomplishments. This information should be used in rating the employee’s performance.

- The supervisor completes the rating and comment portions for each of the appraisal competencies: agency wide, job specific and supervisory (if applicable). Notable performance by the employee is to be listed also within the comments for any sections applicable. The overall score is the combined score of each competency section total score which is weighted as follows:

Agency Wide Competencies = 50%

Job Specific Competencies= 50% for (non-supervisors) and 40% (for supervisors)

Supervisory Competencies = 10% (for supervisors)

3. Supervisors should speak to the employee meeting or not meeting previous year goals set under the Current Goals section. New employees who were not hired for the past appraisal period will not have any current goals listed.
4. Under the Future Goals section, supervisors should identify areas for improvement that the employee is expected to work on over the course of the next year, including the recommended action for improvement and setting completion deadlines. Supervisor are expected to complete check-ins with the employee to monitor the progress of completing goals.
5. The Succession Planning section offers supervisors the ability to speak to the employee's readiness for promotion. Supervisors will rate employees based on the following scale:
 - Too new to rate
 - Well placed in current role
 - Promotable immediately or within 1 year
 - Promotable within 2 – 3 years
6. The next-level supervisor(s), and the Division Director reviews the rated appraisal, collaborating with the immediate supervisor to resolve any areas of disagreement, and provides approval.
7. After the next level supervisor(s), and Division Director (or designee) approves the appraisal, the immediate supervisor will meet with the employee to review their evaluation.

During and Following the Performance Appraisal Interview

8. The immediate supervisor conducts the Performance Appraisal Review with the employee to discuss the level of performance on each performance standard. The employee is encouraged to bring evidence of performance to this review.
9. The following rating scale is used for interpreting the averaging of scores:

Unacceptable =	0 - 0.99
<i>Development Needed</i> =	1.00 - 1.99
Fully Proficient =	2.00 - 2.99
Exceeds Expectations =	3.00 – 3.99
Outstanding =	4.00 – 4.79
WOW! =	4.80 – 5.00

10. The supervisor should mark the Meet with Employee task complete and then the system will release the appraisal to the employee for signature.
11. The employee signs the performance appraisal.
12. The appraisal is returned to the supervisor after the employee has signed, for the supervisor to provide final signoff.

9.05 Annual Employee Appraisal for Performance Pay Increases

The overall Annual Employee Performance Appraisal score is used as a tool to aide in the determination of Performance Pay increases for employees hired, promoted or transferred prior to October 1st of the current fiscal year of the appraisal period.

In instances where an employee is hired, promoted, transitioned or transferred on or after October 1st but before April 1st of the current fiscal for the appraisal cycle, the overall score earned for the Probationary or Trial appraisal will be used for Annual Performance increase calculations.

Only Career Service employees newly hired between April 1st and September 30th of the current fiscal year, will be eligible for a Probationary Pay increase after successful completion of the probationary period.

Senior Management Incentive Pay increases are not determined by their employee appraisal but at the recommendation of the Division Director (or designee) and approval of the County Administrator.

Performance Pay increases are not guaranteed and may vary in amount contingent upon funding availability. See Policy section 5.06: Annual Salary Adjustments.

9.06 Employee Disagreement with Appraisal

If an employee disagrees with any statement in a performance appraisal, he or she may attach a written rebuttal of performance standards, job tasks, ratings or the overall appraisal to the Performance Appraisal System under the Note & Attachment section within NEOGOV Perform or type comments into the comment section under the Employee signature task. **Performance Appraisals are not open to grievance by employees.**