

PALM BEACH COUNTY
BOARD OF COUNTY COMMISSIONERS

WORKSHOP SUMMARY

Meeting Date: January 30, 2024

Department: Administration/Human Resources

I. EXECUTIVE BRIEF

Motion and Title: Staff requests Board direction regarding: Performance appraisal process for contractual staff: County Administrator, County Attorney and Internal Auditor.

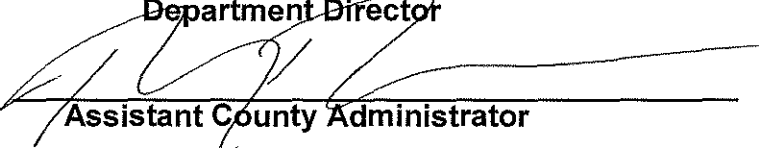
Summary: Pursuant to Board direction at the Palm Beach County Board of County Commissioner’s Board meeting of December 19, 2023, Human Resources was tasked with providing suggestions for a performance appraisal process for contractual staff to include the County Administrator, County Attorney and the Internal Auditor. Countywide (DO)

Background and Policy Issues: Human Resources reviewed the personnel files of the predecessors of current contractual staff in an effort to recapture the performance appraisal process previously utilized. Human Resources also performed benchmark surveys with various counties, municipalities and other entities in an effort to capture additional options for consideration:

Attachments:

1. Performance Appraisal PowerPoint Presentation
2. County Administrator Performance Appraisal Form
3. County Attorney Performance Appraisal Form
4. County Internal Auditor Performance Appraisal Form

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Recommended by:	<u>Wayne Condry</u> <small>Wayne Condry (Jan 19, 2024 15:05 EST)</small>	Jan 19, 2024
	Department Director	Date
Approved by:	 Assistant County Administrator	<u>1/26/2024</u> Date

II. FISCAL IMPACT ANALYSIS

A. Five Year Summary of Fiscal Impact:

Fiscal Years	2024	2025	2026	2027	2028
Capital Expenditures					
Operating Costs	N/A	N/A	N/A	N/A	N/A
External Revenues					
Program Income(County)					
In-Kind Match(County)					
NET FISCAL IMPACT					
#ADDITIONAL FTE					
POSITIONS (CUMULATIVE)					

Is Item Included in Current Budget? Yes No
 Does this item include the use of federal funds? Yes No
 Does this item include the use of state funds? Yes No

Budget Account **Fund** **Agency** **Organization** **Object**
No: _____

B. Recommended Sources of Funds/Summary of Fiscal Impact:

Modifying or adding to the existing performance appraisal process will not incur a fiscal impact.

C. Departmental Fiscal Review: _____

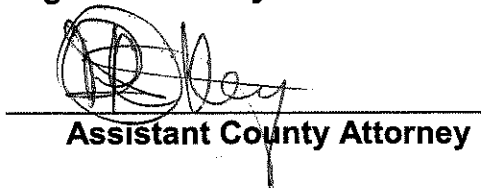
III. REVIEW COMMENTS:

A. OFMB Fiscal and/or Contract Dev. and Control Comments:


 Lisa Martin 1/29/2024
 KK 1/23 OFMB


 Lanny M. Arini 1/29/24
 Contract Dev. & Control

B. Legal Sufficiency


 Assistant County Attorney

C. Other Department Review

 Department Director



Performance Appraisals

January 30, 2024

Attachment 1

BCC Performance Appraisal Peer Review

Based on Board direction received on December 19, 2023, Human Resources began a peer review of performance appraisals by contacting several counties and cities in an effort to benchmark new or existing performance appraisal practices for contractual staff.

BCC Performance Appraisal History

Human Resources also reviewed previously existing processes within the County.

Human Resources compiled the past County practices and existing benchmarked data to present you with a proposed performance appraisal instrument.

Benchmarking Results

- Broward County
- Florida City/County Management Association
- Hillsborough County
- International City/County Management Association
- Leon County
- Miami-Dade County
- Orange County
- Pinellas County
- Sarasota (City)
- School District of PBC
- Treasure Coast RPC
- Village of Wellington

Performance Appraisal Option 1 - Status Quo

- Maintain current process of self reporting highlights and accomplishments with annual contractual renewals.

Performance Appraisal Option 2 - Oral Presentation

- Revise current process to include an oral presentation before the Board with data and accomplishments for review from the Board.
- Expectations, Goals and Objectives from the Board to be set for the next rating period.

Performance Appraisal Option 3 - New Process

- Adopt a new performance appraisal instrument and process.

Sample Performance Appraisal Instrument

Palm Beach County
Performance Appraisal Form for County Administrator

Employee Name: _____ Date of Hire: _____
Commissioner: _____
Date of Evaluation: _____ Period of Evaluation From: _____ To: _____

Evaluation Instructions:
This form shall be completed by each Commissioner to evaluate the County Administrator's performance in each of the areas noted below. Each member of the Board shall sign below and forward it to the Human Resources Director. Performance levels can be noted based on the following scale:

<input type="checkbox"/> 5 = EXCELLENT:	The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
<input type="checkbox"/> 4 = SUPERIOR:	The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrated no appreciable performance deficiencies.
<input type="checkbox"/> 3 = SATISFACTORY:	The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
<input type="checkbox"/> 2 = FAIR:	The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
<input type="checkbox"/> 1 = UNSATISFACTORY:	The incumbent frequently fails to meet minimum performance expectations.

Signature of Commissioner: _____ Date: _____

Acknowledgment by Employee: _____ Date: _____
(Employee Signature)

Employee Comments: _____

Sample Performance Appraisal Instrument

Final Rating

PART I

JOB DIMENSIONS

TEAMWORK SKILLS

	<u>Rating/Comments</u>				
1. Team Management	5	4	3	2	1
<p>Ability/willingness to understand the overall needs and priorities of entire County government and community at large; conscientiously contributes in administrative decision making that affects the entire County; maintains a proper perspective on their role and is sensitive to competing needs of the Board; works effectively and positively with all members of the management team.</p>					
<p>Comments:</p> <hr/> <hr/>					
2. Management Reporting	5	4	3	2	1
<p>Ability and willingness to submit complete and accurate information to the Board on major issues and projects. Monitor the progress of matters of concern and keep the Board informed of occurrences hereafter.</p>					
<p>Comments:</p> <hr/> <hr/>					

Sample Performance Appraisal Instrument

PART I	
JOB DIMENSIONS	
<u>COMMUNICATION SKILLS</u>	
	<u>Rating/Comments</u>
1. Public Communication	5 4 3 2 1
<div style="border: 1px solid black; padding: 2px;">Clearly explains programs and issues to the public, establishes good rapport with diversity of interest groups; listens well and responds directly.</div>	
Comments:	<hr/> <hr/> <hr/>
2. Internal Communication	5 4 3 2 1
<div style="border: 1px solid black; padding: 2px;">Maintains open lines with subordinates, solicits their input and advice on various matters, involves staff in decision making, informs them of changes in direction.</div>	
Comments:	<hr/> <hr/> <hr/>
3. Administrative and Legislative Communication	5 4 3 2 1
<div style="border: 1px solid black; padding: 2px;">Communicates closely with the Senate, and other governmental entities on key issues concerning the County.</div>	
Comments:	<hr/> <hr/> <hr/>

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
PROBLEM-SOLVING SKILLS					
	Rating/Comments				
	5	4	3	2	1
1. Innovation					
Creativity, insight, ideas, willingness to take calculated risks, enterprisingness.					
Comments:					

2. Analysis					
Clearly identifies issues, develops full range of possible alternatives, considers potential impacts or consequences, quantifies variables where reasonable.					
Comments:					

3. Decision-Making/Judgment					
Final results of analytical process tested against judgment, experience or intuition. Appropriate timing, avoids procrastination and avoids acting impulsively without adequate information involvement.					
Comments:					

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
PROBLEM-SOLVING SKILLS - CONT'D.					
	Rating/Comments				
4. Implementation	5	4	3	2	1
Lays foundation so staff is willing to accept decisions; delegates to involve staff throughout process, able to tell the final decision and create a control system to monitor results.					
Comments:	<hr/> <hr/>				

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
MANAGEMENT SKILLS					
	Rating/Comments				
1. Planning/Organization	5	4	3	2	1
<p>Identifies long term and mid term goals and potential problems, develops action plans to accomplish goals, monitors projections versus actual and makes timely adjustments; characterized by a minimum of excuses and flexibility in responses.</p>					
Comments:					
<hr/>					
<hr/>					
2. Financial Management	5	4	3	2	1
<p>Oversees preparation of annual budget, considers long term consequences, searches for revenue sources, constantly in touch with operational literature and activities of other communities to assist in identifying cost effective levels of service and in developing increased productivity, avoids over budgeting and continually tracks actual versus projected to ensure targets are met.</p>					
Comments:					
<hr/>					
<hr/>					

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
MANAGEMENT SKILLS – CONT'D					
	Rating/Comments				
3. Emotional Intelligence	5	4	3	2	1
Implements policy that may be contrary to original recommendations; even tempered, dependable, consistent; candidly admits problems when they occur and pursues corrective action.					
Comments:					
<hr/>					
<hr/>					
4. Personal Management	5	4	3	2	1
Effective personal time management; establishes issues by impact; effective delegation.					
Comments:					
<hr/>					
<hr/>					

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
<u>LEADERSHIP SKILLS</u>					
	<u>Rating/Comments</u>				
	5	4	3	2	1
1. Human Resources Management					
<div style="border: 1px solid black; padding: 5px; margin: 5px;"> Leadership by example; creates a positive environment for work; supportive, fair and firm. Delegates with accountability; provides continuous feedback to staff on progress; assists staff with professional and personal development. </div>					
Comments:					

2. Results Orientation					
<div style="border: 1px solid black; padding: 5px; margin: 5px;"> Emphasis on solving problems; acceptance of responsibility; independent; recognizes potential problems and seeks solutions. </div>					
Comments:					

3. Initiative					
<div style="border: 1px solid black; padding: 5px; margin: 5px;"> Motivated; high energy; strong desire to succeed; positive; diligent; impartial and objective. </div>					
Comments:					

Sample Performance Appraisal Instrument

PART I					
JOB DIMENSIONS					
<u>LEADERSHIP SKILLS -- CONT'D.</u>					
	<u>Rating/Comments</u>				
4. Professionalism and Ethics	5	4	3	2	1
<input type="text" value="Represents the County in a professional and ethical manner."/>					
Comments:					
<hr/>					
<hr/>					
<hr/>					

Sample Performance Appraisal Instrument

PART II
GOALS AND OBJECTIVES

Future goals and objectives for next rating period:

1.

2.

3.

Proposed Timeline

1. Sixty (60) days prior to date of the Performance Appraisal, Human Resources notifies the Contractual Employee and the Board that the Performance Appraisal is due.
 - Commissioners may meet with the Contractual Employee to individually discuss the Performance Appraisal.
2. Thirty (30) days prior to the Performance Appraisal deadline, completed Performance Appraisal instrument is provided to Human Resources for processing.
3. Human Resources creates and Agenda Item for the Performance Appraisal process to be discussed at the first regularly scheduled meeting in April.

Performance Appraisal Options Recap

- Option 1 - Status Quo -Current Process of Self Reporting Highlights and Accomplishments with Contract Renewal
- Option 2 - Oral Presentation Before the Board
- Option 3 - Adopt a New Performance Appraisal Instrument and Process



Performance Appraisal

Questions?

Palm Beach County

Performance Appraisal Form for County Administrator

Employee Name: _____ Date of Hire: _____

Commissioner: _____

Date of Evaluation: _____ Period of Evaluation From: _____ To: _____

Evaluation Instructions:

This form shall be completed by each Commissioner to evaluate the County Administrator's performance in each of the areas noted below. Each member of the Board shall sign below and forward it to the Human Resources Director. Performance levels can be noted based on the following scale:

- 5 = EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 = SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrated no appreciable performance deficiencies.
- 3 = SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 = FAIR** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 = UNSATISFACTORY** The incumbent frequently fails to meet minimum performance expectations.

Signature of Commissioner: _____

Date: _____

Acknowledgment by Employee: _____

Date: _____

(Employee Signature)

Employee Comments: _____

***This performance appraisal process is not intended to and shall not be constructed as a re-opening or modification of the existing County Administrator's employment contract.**

Final Rating

PART I

JOB DIMENSIONS

TEAMWORK SKILLS

Rating/Comments

1. Team Management

5 4 3 2 1

Ability/willingness to understand the overall needs and priorities of entire County government and community at large: constructively contributes in administrative decision-making that affects the entire County; maintains a proper perspective on their role and is sensitive to competing needs of the Board; works effectively and positively with all members of the management team.

Comments:

2. Management Reporting

5 4 3 2 1

Ability and willingness to submit complete and accurate information to the Board on major issues and projects. Monitors the progress of matters of concern and keeps the Board informed of departures from schedule.

Comments:

PART I
JOB DIMENSIONS
COMMUNICATION SKILLS

Rating/Comments

1. Public Communication

5 4 3 2 1

Clearly explains programs and issues to the public; establishes good rapport with diversity of interest groups; listens well and responds directly.

Comments:

2. Internal Communication

5 4 3 2 1

Maintains open lines with subordinates, solicits their input and advice on various matters; involves staff in decision-making, informs them of changes in direction.

Comments:

3. Administrative and Legislative Communication

5 4 3 2 1

Communicates closely with the Board, and other governmental entities on key issues concerning the County.

Comments:

PART I
JOB DIMENSIONS
PROBLEM-SOLVING SKILLS

Rating/Comments

1. Innovation 5 4 3 2 1

Creativity, insightfulness, willingness to take calculated risks, entrepreneurship.

Comments:

2. Analysis 5 4 3 2 1

Clearly identifies issues; develops full range of possible alternatives, considers potential impacts or consequences; (quantifying variables where reasonable).

Comments:

3. Decision-Making/Judgment 5 4 3 2 1

Final results of analytical process tested against judgment, experience or intuition. Appropriate timing: avoids procrastination and avoids acting precipitously without adequate information involvement.

Comments:

PART I

JOB DIMENSIONS

PROBLEM-SOLVING SKILLS – CONT'D.

Rating/Comments

4. Implementation

5 4 3 2 1

Lays foundation so staff is willing to accept decisions; dedicated to involve staff throughout process; able to sell the final decision and create a control system to monitor results.

Comments:

DRAFT

PART I

JOB DIMENSIONS

MANAGEMENT SKILLS

Rating/Comments

1. Planning/Organization

5 4 3 2 1

Identifies long-term and mid-term goals and potential problems; develops action plans to accomplish goals; monitors projections versus actual and makes timely adjustments; characterized by a minimum of surprises and flexibility in responses.

Comments:

2. Financial Management

5 4 3 2 1

Oversees preparation of annual budget, considers long-term consequences, searches for revenue sources; constantly in touch with professional literature and activities of other communicates to assist in identifying cost effective levels of service and in developing increased productivity; avoids over budgeting and continually tracks actual versus projected to ensure targets are met.

Comments:

PART I

JOB DIMENSIONS

MANAGEMENT SKILLS – CONT'D

Rating/Comments

3. Emotional Intelligence

5 4 3 2 1

Implements policy that may be contrary to original recommendations; even-tempered, dependable, consistent; candidly admits problems when they occur and pursues corrective action.

Comments:

4. Personal Management

5 4 3 2 1

Effective personal time management; prioritizes issues by impact; effective delegation.

Comments:

PART I

JOB DIMENSIONS

LEADERSHIP SKILLS

Rating/Comments

1. Human Resources Management

5 4 3 2 1

Leadership by example; creates a positive environment for work; supportive, fair and firm; delegates with accountability; provides continuous feedback to staff on progress; assists staff with professional and personal development.

Comments:

2. Results Orientation

5 4 3 2 1

Emphasis on solving problems; acceptance of responsibility; independently recognizes potential problems and seeks solutions.

Comments:

3. Initiative

5 4 3 2 1

Motivated, high energy; strong desire to succeed; positive, diligent, impartial and objective.

Comments:

PART I
JOB DIMENSIONS
LEADERSHIP SKILLS – CONT'D.

Rating/Comments

4. Professionalism and Ethics 5 4 3 2 1

Represents the County in a professional and ethical manner.

Comments:

DRAFT

PART II
GOALS AND OBJECTIVES

Future goals and objectives for next rating period:

1.

2.

3.

Palm Beach County

Performance Appraisal Form for County Attorney

Employee Name: _____ Date of Hire: _____

Commissioner: _____

Date of Evaluation: _____ Period of Evaluation From: _____ To: _____

Evaluation Instructions:

This form shall be completed by each Commissioner to evaluate the County Administrator's performance in each of the areas noted below. Each member of the Board shall sign below and forward it to the Human Resources Director. Performance levels can be noted based on the following scale:

- 5 = EXCELLENT:** The incumbent consistently demonstrates performance at a very high standard that significantly surpasses reasonable expectations.
- 4 = SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrated no appreciable performance deficiencies.
- 3 = SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 = FAIR** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 = UNSATISFACTORY** The incumbent frequently fails to meet minimum performance expectations.

Signature of Commissioner: _____

Date: _____

Acknowledgment by Employee: _____

Date: _____

(Employee Signature)

Employee Comments: _____

*This performance appraisal process is not intended to and shall not be constructed as a re-opening or modification of the existing County Attorney's employment contract.

Final Rating
PART I
JOB DIMENSIONS
TEAMWORK SKILLS

Rating/Comments

1. Team Management

5 4 3 2 1

Ability/willingness to understand the overall needs and priorities of entire County government and community at large; constructively contributes in administrative decision-making that affects the entire County; maintains a proper perspective on their role and is sensitive to competing needs of the Board; works effectively and positively with all members of the management team.

Comments:

2. Management Reporting

5 4 3 2 1

Ability and willingness to submit complete and accurate information to the Board on major issues and projects. Monitors the progress of matters of concern and keeps the Board informed of departures from schedule.

Comments:

PART I

JOB DIMENSIONS

COMMUNICATION SKILLS

Rating/Comments

1. Public Communication

5 4 3 2 1

Clearly explains programs and issues to the public; establishes good rapport with diversity of interest groups; listens well and responds directly.

Comments:

2. Internal Communication

5 4 3 2 1

Maintains open lines with subordinates, solicits their input and advice on various matters; involves staff in decision-making, informs them of changes in direction.

Comments:

3. Administrative and Legislative Communication

5 4 3 2 1

Communicates closely with the Board, and other governmental entities on key issues concerning the County.

Comments:

PART I
JOB DIMENSIONS
PROBLEM-SOLVING SKILLS

Rating/Comments

1. Innovation 5 4 3 2 1

Creativity, insightfulness, willingness to take calculated risks, entrepreneurship.

Comments:

2. Analysis 5 4 3 2 1

Clearly identifies issues; develops full range of possible alternatives, considers potential impacts or consequences; (quantifying variables where reasonable).

Comments:

3. Decision-Making/Judgment 5 4 3 2 1

Final results of analytical process tested against judgment, experience or intuition. Appropriate timing: avoids procrastination and avoids acting precipitously without adequate information involvement.

Comments:

PART I

JOB DIMENSIONS

PROBLEM-SOLVING SKILLS – CONT'D.

Rating/Comments

4. Implementation

5 4 3 2 1

Lays foundation so staff is willing to accept decisions; dedicated to involve staff throughout process; able to sell the final decision and create a control system to monitor results.

Comments:

DRAFT

PART I
JOB DIMENSIONS
MANAGEMENT SKILLS

Rating/Comments

1. Planning/Organization

5 4 3 2 1

Identifies long-term and mid-term goals and potential problems; develops action plans to accomplish goals; monitors projections versus actual and makes timely adjustments; characterized by a minimum of surprises and flexibility in responses.

Comments:

2. Financial Management

5 4 3 2 1

Oversees preparation of annual budget, considers long-term consequences; avoids over budgeting and continually tracks actual versus projected to ensure targets are met.

Comments:

PART I

JOB DIMENSIONS

MANAGEMENT SKILLS – CONT'D

Rating/Comments

3. Emotional Intelligence

5 4 3 2 1

Implements policy that may be contrary to original recommendations; even-tempered, dependable, consistent; candidly admits problems when they occur and pursues corrective action.

Comments:

4. Personal Management

5 4 3 2 1

Effective personal time management; prioritizes issues by impact; effective delegation.

Comments:

PART I
JOB DIMENSIONS
LEADERSHIP SKILLS

Rating/Comments

1. Human Resources Management

5 4 3 2 1

Leadership by example; creates a positive environment for work; supportive, fair and firm; delegates with accountability; provides continuous feedback to staff on progress; assists staff with professional and personal development.

Comments:

2. Results Orientation

5 4 3 2 1

Emphasis on solving problems; acceptance of responsibility; independently recognizes potential problems and seeks solutions.

Comments:

3. Initiative

5 4 3 2 1

Motivated, high energy; strong desire to succeed; positive, diligent, impartial and objective.

Comments:

PART I
JOB DIMENSIONS
LEADERSHIP SKILLS – CONT'D.

Rating/Comments

4. Professionalism and Ethics 5 4 3 2 1

Represents the County in a professional and ethical manner.

Comments:

DRAFT

PART I
JOB DIMENSIONS
LEGAL REPRESENTATION

Rating/Comments

1. Representation

5 4 3 2 1

Aggressively represents the County's interests as directed by the Board.

Comments:

2. Approach

5 4 3 2 1

Approach is effective in achieving the best possible legal outcomes for the County's interests given the issues that arise.

Comments:

3. Neutrality and Fairness

5 4 3 2 1

Impartially and objectively performs duties and responsibilities.

Comments:

PART II
GOALS AND OBJECTIVES

Future goals and objectives for next rating period:

1.

2.

3.

DRAFT

Palm Beach County

Performance Appraisal Form for Internal Auditor

Employee Name: _____ Date of Hire: _____

Commissioner: _____

Date of Evaluation: _____ Period of Evaluation From: _____ To: _____

Evaluation Instructions:

This form shall be completed by each Commissioner to evaluate the County Administrator's performance in each of the areas noted below. Each member of the Board shall sign below and forward it to the Human Resources Director. Performance levels can be noted based on the following scale:

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- 4 = SUPERIOR:** The incumbent consistently demonstrates performance that generally exceeds reasonable expectations. The individual demonstrated no appreciable performance deficiencies.
- 3 = SATISFACTORY:** The incumbent consistently meets reasonable performance expectations. The individual demonstrates an acceptable degree of competence and performance.
- 2 = FAIR** The incumbent achieves the minimum of performance expectations. The individual requires development in specific areas in order to meet reasonable expectations of performance.
- 1 = UNSATISFACTORY** The incumbent frequently fails to meet minimum performance expectations.

Signature of Commissioner: _____

Date: _____

Acknowledgment by Employee: _____

Date: _____

(Employee Signature)

Employee Comments: _____

*This performance appraisal process is not intended to and shall not be constructed as a re-opening or modification of the existing Internal Auditor's employment contract.

Final Rating

PART I

JOB DIMENSIONS

TEAMWORK SKILLS

Rating/Comments

1. Team Management

5 4 3 2 1

Ability/willingness to understand the overall needs and priorities of entire County government and community at large; constructively contributes in administrative decision-making that affects the entire County; maintains a proper perspective on their role and is sensitive to competing needs of the Board; works effectively and positively with all members of the management team.

Comments:

2. Management Reporting

5 4 3 2 1

Ability and willingness to submit complete and accurate information to the Board on major issues and projects. Monitors the progress of matters of concern and keeps the Board informed of departures from schedule.

Comments:

PART I

JOB DIMENSIONS

COMMUNICATION SKILLS

Rating/Comments

1. Public Communication

5 4 3 2 1

Clearly explains programs and issues to the public; establishes good rapport with diversity of interest groups; listens well and responds directly.

Comments:

2. Internal Communication

5 4 3 2 1

Maintains open lines with subordinates, solicits their input and advice on various matters; involves staff in decision-making, informs them of changes in direction.

Comments:

3. Administrative and Legislative Communication

5 4 3 2 1

Communicates closely with the Board, and other governmental entities on key issues concerning the County.

Comments:

PART I
JOB DIMENSIONS
PROBLEM-SOLVING SKILLS

Rating/Comments

1. Innovation 5 4 3 2 1

Creativity, insightfulness, willingness to take calculated risks, entrepreneurship.

Comments:

2. Analysis 5 4 3 2 1

Clearly identifies issues; develops full range of possible alternatives, considers potential impacts or consequences; (quantifying variables where reasonable).

Comments:

3. Decision-Making/Judgment 5 4 3 2 1

Final results of analytical process tested against judgment, experience or intuition. Appropriate timing: avoids procrastination and avoids acting precipitously without adequate information involvement.

Comments:

PART I

JOB DIMENSIONS

PROBLEM-SOLVING SKILLS – CONT'D.

Rating/Comments

4. Implementation

5 4 3 2 1

Lays foundation so staff is willing to accept decisions; dedicated to involve staff throughout process; able to sell the final decision and create a control system to monitor results.

Comments:

DRAFT

PART I

JOB DIMENSIONS

MANAGEMENT SKILLS

Rating/Comments

1. Planning/Organization

5 4 3 2 1

Identifies long-term and mid-term goals and potential problems; develops action plans to accomplish goals; monitors projections versus actual and makes timely adjustments; characterized by a minimum of surprises and flexibility in responses.

Comments:

2. Financial Management

5 4 3 2 1

Oversees preparation of annual budget, considers long-term consequences; avoids over budgeting and continually tracks actual versus projected to ensure targets are met.

Comments:

PART I
JOB DIMENSIONS
MANAGEMENT SKILLS – CONT'D

Rating/Comments

3. Emotional Intelligence

5 4 3 2 1

Implements policy that may be contrary to original recommendations; even-tempered, dependable, consistent; candidly admits problems when they occur and pursues corrective action.

Comments:

4. Personal Management

5 4 3 2 1

Effective personal time management; prioritizes issues by impact; effective delegation.

Comments:

PART I

JOB DIMENSIONS

LEADERSHIP SKILLS

Rating/Comments

1. Human Resources Management

5 4 3 2 1

Leadership by example; creates a positive environment for work; supportive, fair and firm; delegates with accountability; provides continuous feedback to staff on progress; assists staff with professional and personal development.

Comments:

2. Results Orientation

5 4 3 2 1

Emphasis on solving problems; acceptance of responsibility; independently recognizes potential problems and seeks solutions.

Comments:

3. Initiative

5 4 3 2 1

Motivated, high energy; strong desire to succeed; positive, diligent, impartial and objective.

Comments:

PART I

JOB DIMENSIONS

LEADERSHIP SKILLS – CONT'D.

Rating/Comments

4. Professionalism and Ethics 5 4 3 2 1

Represents the County in a professional and ethical manner.

Comments:

DRAFT

PART I
JOB DIMENSIONS
INTERNAL AUDIT REPRESENTATION

Rating/Comments

1. Planning & Organizing

5 4 3 2 1

Develops Comprehensive Annual Internal Audit Plan.

Comments:

2. Risk Assessment

5 4 3 2 1

Develops Annual Risk Assessment Plan.

Comments:

3. Risk Assessment

5 4 3 2 1

Provides thoughtful Annual Risk Assessment.

Comments:

PART I

JOB DIMENSIONS

INTERNAL AUDIT REPRESENTATION – CONT'D.

Rating/Comments

4. Implementation 5 4 3 2 1

Implements Annual Audit Plan.

Comments:

5. Audits 5 4 3 2 1

Conducts audits of County programs in an independent, fact-based and objective manner.

Comments:

6. Audits 5 4 3 2 1

Develops the most effective and efficient means of delivering high quality audit services.

Comments:

PART I

JOB DIMENSIONS

INTERNAL AUDIT REPRESENTATION – CONT'D.

Rating/Comments

7. Special Projects

5 4 3 2 1

Performs timely Special Projects as requested.

Comments:

DRAFT

PART II
GOALS AND OBJECTIVES

Future goals and objectives for next rating period:

1.

2.

3.

DRAFT