

## UNIFIED PERSONNEL SYSTEM

Annex Building 4th Floor  
400 S. Fort Harrison Ave.  
Clearwater, Florida 33756  
Phone: (727) 464-3367  
FAX: (727) 464-3949  
[www.co.pinellas.fl.us/persnl](http://www.co.pinellas.fl.us/persnl)  
Website: [www.pinellascounty.org](http://www.pinellascounty.org)



Peggy Rowe  
Director

TO: The Honorable Chair and Members  
of the Unified Personnel Board

FROM: Peggy Rowe, Director of Human Resources

SUBJECT: Performance Standards

DATE: February 24, 2012

A handwritten signature in black ink, appearing to be "P. Rowe", written over the name "Peggy Rowe" in the "FROM:" line.

As discussed at the February 2, 2012 Personnel Board meeting, attached is a revised Performance Appraisal Form in order to facilitate the annual review of my performance. My annual performance review is typically discussed at the August Personnel Board meeting.





# MANAGEMENT STAFF PERFORMANCE APPRAISAL

Employee:	Margaret R. Rowe	Employee ID #	27766
Job Title:	Director Human Resources	Rating Period:	
Dept.:	Human Resources	Choose appraisal type in box below ↓	
Rater:			
Perf. Plan Date:		Effective Date:	

## PERFORMANCE SUMMARY

**Instructions:** On this page, the reviewer will assign weights to each row in the "Competencies" section, and the "Performance Expectations" section if required by the Appointing Authority/Department/Section. (Performance Expectations are otherwise *optional*. If used, only the most significant expectations should be listed.) The other columns ("Rating # Equiv." and "Section Rating") are not entered on this page. Instead, they are entered on the individual worksheets and the scores roll forward automatically onto this sheet. Calculations are also automatic.

	Section	Weight	Rating # Equiv.	Section Rating
Competencies	Leading People <i>(weight of 10 - 20)</i>	12	0	0
	Communicating & Building Coalitions <i>(weight of 10 - 20)</i>	12	0	0
	Public Sector Business Knowledge <i>(weight of 10 - 20)</i>	12	0	0
	Technical Credibility <i>(weight of 30 - 60)</i>	36	0	0
	Competencies Subtotals and Rating ⇒	72		BELOW
	Goals/standards shall not exceed a cumulative total weight of 40.			
Performance Expectations	#1 Organizational Learning	8	0	0
	#2 Wellness and Engagement	8	0	0
	#3 Value of Volunteer Services	7	0	0
	#4 Review of Personnel Rules	5	0	0
	#5		0	0
	Goals/Performance Standards Subtotals and Rating ⇒	28		BELOW
Total of weighting <i>(Must equal 100)</i> =		100		

Overall Rating = BELOW

Use the feature to the right **only** when "over-riding" the "Overall Rating" above - either when 1) two or more competencies or 2 or more performance expectations are rated as "Below" OR 2) the Rater and Reviewer are both in concurrence that the overall rating should be "Below" regardless of the overall calculated score. An explanation should be provided below in either case.

Revised  
Overall  
Rating (if  
applicable)  
→

## SUMMARY COMMENTS BELOW





# MANAGEMENT STAFF PERFORMANCE APPRAISAL

Employee:

Margaret R. Rowe

Period:

0

## COMPETENCIES - OBSERVED MASTERY

Instructions: Fill in an assessment value in the right-most box for each category below. Fill in a value in the summary box at the bottom. A section at the end of the "Competencies" ratings is provided for comments. Evaluating/scoring: Enter a numerical indicator of your assessment of the employee's observed/documented mastery of each listed competency. The established values are 2 = Exceeds, 1 = Meets, 0 = Below Expectations, N/O = Not Observed/No Opportunity to Observe, or N/A = Not Applicable to the position. You may use a "+" or a "-" symbol to indicate that the employee is either close to the next higher rating or that there is room for improvement within the rating. Example: 1+ would indicate the employee is a "Meets," but is close to earning an "Exceeds."

**LEADING PEOPLE:** This core competency emphasizes the ability to develop and implement strategies to maximize employee performance excellence and foster high ethical standards in meeting the County's vision, mission, and goals. **Weight (10-20)** **12**

### Interpersonal Skills ⇌

- 1 Assesses and responds to the needs, feelings, and capabilities of different people in various situations.
- 2 Is tactful, compassionate, sensitive, and treats others with respect.
- 3 Manages and resolves conflicts in a positive and constructive manner.
- 4 Openly shares information with appropriate individuals to meet organizational objectives.

### Leveraging Diversity ⇌

- 5 Recruits, develops, rewards, and retains a diverse high quality workforce in an equitable manner in accordance with applicable laws.
- 6 Understands, values, and seeks out individual differences and strengths to achieve the vision and mission of the organization.
- 7 Develops and uses measures and rewards to hold self and others accountable for achieving results that embody the principles of diversity.
- 8 Accurately assesses employees and provides developmental opportunities to maximize their capabilities and contributions to achieve the organization's goals.

### Team Building ⇌

- 9 Acknowledges and reinforces individual contributions to team efforts
- 10 Encourages and facilitates cooperation within the organization and with customers to develop team spirit and common focus.
- 11 Develops leadership skills in others through coaching, mentoring, rewarding, and guiding employees.
- 12 Assumes responsibility for team shortcomings and shares accolades for success with the team.
- 13 Contributes to morale and organizational climate by identifying, preventing and/or managing negative confrontation.

### Integrity/Honesty ⇌

- 14 Creates a culture that fosters a high standard of ethics.
- 15 Behaves in a fair and ethical manner.

**Rating Summary** for WORKING WITH PEOPLE: This is an overall assessment, not a mathematical computation of the above. Enter Whole numbers only. (Neither N/O nor N/A may be entered here.) Do not enter either a "+" or a "-" in this overall score as it will cause the rating to roll forward to the summary and calculations as a zero. The rating will transfer to the "Performance Summary" sheet.

**COMMUNICATING AND BUILDING COALITIONS:** This core competency involves the ability to explain and advocate facts and ideas in a convincing manner while communicating and negotiating with individuals and groups. It also includes the ability to develop a professional network with other organizations and individuals to assist in solving issues and identifying the internal and external forces that impact the work of the organization. **Weight (10 - 20)** **12**

### Oral Communication ⇌

- 16 Uses correct English grammar.
- 17 Makes clear and convincing oral presentations and discussions.
- 18 Listens effectively to ensure mutual understanding and clarifies information as needed to achieve mutual understanding.



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19	Facilitates an open exchange of ideas and fosters an atmosphere of open communication through demonstrated respect and receptiveness to other's ideas and contributions.	
<b>Written Communication ⇨</b>		
20	Uses correct English grammar, punctuation, and spelling.	
21	Expresses technically accurate facts and ideas in a clear, convincing, logical, organized and professional manner.	
22	Ensures that all documents generated reflect the position and work of the organization.	
23	Chooses the appropriate communication vehicles and formats to achieve desired results.	
<b>Influencing/Negotiating ⇨</b>		
24	Persuades others, builds consensus through give and take.	
25	Gains cooperation from others to obtain information and accomplish organizational goals.	
26	Facilitates "win-win" situations.	
<b>Partnering ⇨</b>		
27	Establishes and maintains working relationships with internal units and strengthens internal support bases.	
28	Develops and enhances networks and alliances.	
29	Engages in cross-functional activities.	
30	Collaborates across functional boundaries; finds common ground with a wide range of stakeholders.	
<b>Rating Summary</b> for COMMUNICATING AND BUILDING COALITIONS: This is an overall assessment, not a mathematical computation of the above. Enter Whole numbers only. (Neither N/O nor N/A may be entered here.) Do not enter either a "+" or a "-" in this overall score as it will cause the rating to roll forward to the summary and calculations as a zero. The rating will transfer to the "Performance Summary" sheet.		

<b>PUBLIC SECTOR KNOWLEDGE AND PERFORMANCE:</b> This core competency involves the efficient and effective management of financial, human, and technological resources to accomplish the organization's mission. Inherent in this ability is the need to balance change with stability and continuity while striving to improve customer service with the basic governmental framework. It also involves the ability to foster a work environment that encourages creative thinking and the ability to maintain focus, intensity, and persistence, even under adversity and in the face of specific as well as institutional resistance to change.		<b>Weight (10- 20)</b>	<b>12</b>
<b>Organizational Awareness ⇨</b>			
31	Identifies the internal and external environment that impacts the work of the organization.		
32	Approaches each situation with a clear perception of organizational and governmental reality; recognizes the impact of alternative courses of action.		
33	Understands linkages between administrative competencies, mission needs, and legal constraints.		
34	Develops plans to deal with, and responds appropriately to, unanticipated internal and external changes (e.g., budget cuts, new legislation, emergencies, disasters, or public health problems).		
<b>Vision ⇨</b>			
35	Takes a long-term view and acts as a catalyst for organizational change.		
36	Builds a shared vision with others.		
37	Has the ability to motivate and influence others to translate vision into action.		
38	Leads the organization's potential for driving performance to higher levels of effectiveness and productivity.		
39	Leads others to fulfillment of the vision.		
<b>Accountability ⇨</b>			
40	Assures that effective and efficient controls are developed and maintained to ensure the integrity of the organization including working within legal authority, structure, and frameworks.		
41	Holds self and others accountable for rules and responsibilities.		
42	Can be relied upon to ensure that projects and products/services within areas of specific responsibility are completed in a timely manner and within budget.		
43	Develops, monitors, evaluates, and implements plans.		
44	Takes corrective actions that focus on results and measure attainment of meaningful outcomes.		
<b>Service Motivation ⇨</b>			
45	Creates and sustains an organizational culture that fosters the quality of service essential to high performance.		
46	Enables others to acquire the tools and support they need to perform well.		
47	Shows a commitment to public service.		





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48	Influences others toward a spirit of service and meaningful contributions to both internal and external customers.	
	<b>Problem Solving</b> ⇨	
49	Identifies and analyzes problems.	
50	Distinguishes between relevant and irrelevant information to make logical decisions.	
51	Provides constructive solutions to individual and organizational problems.	
<b>Rating Summary</b> for PUBLIC SECTOR KNOWLEDGE AND PERFORMANCE: This is an <i>overall assessment</i> , <u>not</u> a mathematical computation of the above. Enter whole numbers only. (Neither N/A nor N/O may be used here.) <b>Do not</b> enter either a "+" or a "-" in this overall score as it will cause the rating to roll forward to the summary and calculations as a zero. The rating will transfer to the "Performance Summary" sheet.		

<b>TECHNICAL CREDIBILITY:</b> This core competency requires broad knowledge, skills, and abilities in the technical area(s) for which the leader is responsible.		<b>Weight (30-60)</b>	<b>36</b>
	<b>General</b> ⇨		
52	Is knowledgeable about the subject matter and understands and appropriately applies procedures, requirements, regulations, and policies related to specialized expertise.		
53	Provides expert advice to supervisors and staff, higher-level management, peers, internal and external customers and stakeholders.		
54	Makes sound capital resource decisions to support technical functions.		
55	Identifies and addresses training and development needs.		
	<b>Specific (Provide at least one, but as many as five specific competencies.)</b> ⇨		
56	Prepares and justifies budgets, stays within budget limitations, and maintains cost-effective practices.		
57	Effectively coordinates issues with stakeholders, including the Personnel Board, all Appointing Authorities, various levels of management, the Employees' Advisory Council, and others as appropriate.		
58	Effectively diagnoses problem situations and makes sound program policy recommendations and decisions.		
59	Establishes and maintains effective systems for data collection and evaluation and conveys useful information to stakeholders.		
60	Prepares staff and stakeholders adequately for change through proper coordination with affected parties.		
<b>Rating Summary</b> for TECHNICAL CREDIBILITY: This is an <i>overall assessment</i> , <u>not</u> a mathematical computation of the above. Enter whole numbers only. (Neither N/A nor N/O may be entered here.) <b>Do not</b> enter either a "+" or a "-" in this overall score as it will cause the rating to roll forward to the summary and calculations as a zero. The rating will transfer to the "Performance Summary" sheet.			





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## PERFORMANCE EXPECTATIONS

### INSTRUCTIONS

Goals/Performance Standards should always be: **S** - Specific, **M** - Measurable (verifiable), **A** - Achievable, **R** - Realistic, **T** - Time Bound

1. **Weight:** Do not enter weight here. This is entered on the summary page and carried forward to this page.
2. **Expectation(s):** Briefly describe the Goal or Performance standard expectation(s).
3. **Measurement:** How will the goal/performance standard be evaluated? (Use quantitative measures such as % increase in production/accuracy levels; time deadlines; and/or use qualitative measures which are descriptive of criteria.)
4. **Summarize:** Describe the results the employee achieved in meeting the goal/performance standard.
5. **Goal Score.** The only acceptable values are: **2** = Exceeded goal, **1** = Met Goal, **0** = Did not accomplish goal. The score will automatically transfer to the "Goal Summary" sheet.

**NOTE:** It is extremely important to keep the Performance Expectations accurate and vital. If, for example, a Goal/Performance Standard is no longer valid, then zero-out the assigned weight (redistribute the weights) and explain the reason in the summary. Other changes can, and should, be made in the descriptions, measurements, and/or weights as the rating period progresses and changes in the emphasis and/or necessity of the goal/performance standard changes..

### GOAL/PERFORMANCE STANDARD # 1

DESCRIBE  
EXPECTATION(S):

Organizational Learning: Implement Unified Personnel System Leadership training initiative. Implement Succession Management development program for supervisory level.

MEASURE(S) TO  
BE USED:

Unified Personnel System Leadership training initiative implemented throughout most UPS departments; training for Succession Management development program for supervisory level initiated by April 2012.

### Rating Period Results - Standard # 1

SUMMARIZE  
RESULTS:

Assigned Weight:

8

SCORE:

### GOAL/PERFORMANCE STANDARD # 2

DESCRIBE  
EXPECTATION(S):

Wellness and Engagement: Implement second year Health and Wellness Incentive Programs, expanding to include spouses. Foster employee engagement in healthy behavior through robust communication plan. More than 75% of employees participate in wellness incentive programs.

MEASURE(S) TO  
BE USED:

Implementation of additional wellness incentives for employees. Participation of employee spouses in the program. Percentage of employees who have qualified for one or more wellness incentive payments.

### Rating Period Results - Standard # 2

SUMMARIZE  
RESULTS:

Assigned Weight:

8

SCORE:





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GOAL/PERFORMANCE STANDARD # 3			
DESCRIBE EXPECTATION(S):	Value of Volunteer Services: Increase the monetary value of volunteer services from \$3.47 million to \$4.5 million.		
MEASURE(S) TO BE USED:	Overall monetary value of volunteer services provided to all UPS organizations during fiscal year 2012, as measured by the per hour rate established by the Independent Sector.		
Rating Period Results - Standard # 3			
SUMMARIZE RESULTS:			
Assigned Weight:	7	SCORE:	

GOAL/PERFORMANCE STANDARD # 4			
DESCRIBE EXPECTATION(S):	Review of Personnel Rules: Conduct a thorough review of all Personnel Rules to determine what changes are necessary and desired to streamline and align the rules with modern HR practices and principles of high performing organizations.		
MEASURE(S) TO BE USED:	Review of the rules completed by June 2012 and recommendations provided to Appointing Authorities and Personnel Board by August 2012.		
Rating Period Results - Standard # 4			
SUMMARIZE RESULTS:			
Assigned Weight:	5	SCORE:	

GOAL/PERFORMANCE STANDARD # 5			
DESCRIBE EXPECTATION(S):			
MEASURE(S) TO BE USED:			
Rating Period Results - Standard # 5			
SUMMARIZE RESULTS:			



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Employee:		Margaret R. Rowe		Rating Period:		0	
Assigned Weight:	0			SCORE:			





## MANAGEMENT STAFF PERFORMANCE APPRAISAL

Employee:  
Rating Period:

Margaret R. Rowe  
0

Ref #s	COMMENTS

*This is to document that the undersigned have, on this date, discussed the employee's performance during the rating period. The employee's signature below does not necessarily indicate agreement with the ratings or comments contained herein. However, if any items/ competencies/ expectations have been identified as below the "Meets" rating and/or if any comments have identified need for improvement, the employee will be held accountable for the required changes.*

RATER:

\_\_\_\_\_  
*Signature and Date*

REVIEWER:

\_\_\_\_\_  
*Signature and Date*

EMPLOYEE:

\_\_\_\_\_  
*Signature and Date*