

<i>Jefferson County Policies &amp; Procedures</i>			
Policy Name:	Annual Performance Appraisal	Approved:	03/20/2025
Policy Number:	217	Author:	James
Associated:	Compensation	Original-	Grove 6/21/2018 Revised- James 10/17/2024

*PURPOSE:*

The purpose of the Jefferson County Commission Annual Employee Assessment is to provide a structured, consistent approach to evaluating employee performance. This policy encourages open discussions regarding employee contributions, achievements, and areas for growth, ensuring that evaluations align with the County’s mission. The County’s mission emphasizes exemplary constituent relations, professionalism, and pride in work, the Commission, and the County.

Performance appraisals also serve as a basis for determining merit-based salary increases, providing training opportunities, and, when necessary, taking corrective actions, including demotion or dismissal. This system does not preclude disciplinary actions that may be taken according to the County’s disciplinary policies.

*COVERED EMPLOYEES:*

This policy applies to all probationary and regular County Commission employees. Employees in elected offices are only covered if the elected official has adopted this policy for their staff.

*PERFORMANCE REVIEW PERIOD:*

The performance review period will assess employee performance as of **October 1** and consider the previous 12 months, from **October 1 to October 1**. Employee performance will be evaluated based on their contributions, alignment with the County’s mission, and achievement of Key Performance Indicators (KPIs). KPIs are measurable values that track progress toward specific objectives.

*DEPARTMENT HEAD RESPONSIBILITIES:*

Department Heads are responsible for ensuring that all employees under their supervision are evaluated annually in alignment with this policy. They will establish KPIs and educate employees on expectations related to KPIs, professionalism, constituent relations, engagement, and ownership. Additionally, Department Heads are expected to meet with their direct reports quarterly to assess progress on these expectations and to address any incidents of non-performance or substandard performance throughout the review period.

*EMPLOYEE RESPONSIBILITIES:*

Employees are expected to perform their duties at a “Meets Expectations” level or higher. Employees must meet or exceed their KPIs. Those struggling to meet KPIs or expectations are expected to proactively seek assistance from their Director to enhance their performance.

#### *MERIT INCREASE ELIGIBILITY CRITERIA:*

To be eligible for merit increases, employees must meet the following criteria:

- Be employed full-time with the Commission.
- Not be placed on an employee improvement plan during the review period.
- Take any required training.
- Achieve at least a "Meets Expectations" rating on all mission-based assessments, including professionalism, constituent relations, and engagement in their work.
- Achieve a "Meets KPI" rating for annual KPIs. While not all KPIs may be met quarterly, a "Meets KPI" rating on an annual basis is required for merit consideration.

#### *PERFORMANCE RATINGS:*

The performance appraisal uses a three-tier rating system:

- **Exceeds Expectations:** Performance consistently surpasses expected standards.
- **Meets Expectations:** Performance meets job standards and expectations, delivering intended results.
- **Needs Improvement:** Performance falls short of expectations, requiring immediate corrective action.

#### *EMPLOYEE RESPONSE TO APPRAISAL:*

Employees who receive a "Needs Improvement" rating on their annual performance appraisal may submit a written statement to be included in their Official Personnel File. The content of the performance appraisal, including comments, ratings, and merit increases, is not subject to the County's grievance procedure.

#### *UNSATISFACTORY PERFORMANCE:*

Supervisors will address specific incidents of unsatisfactory performance or non-performance throughout the appraisal period, up to and including disciplinary action. Repeated or serious incidents of unsatisfactory performance will be reflected in the employee's annual performance appraisal and may affect merit-based salary increases.

#### *PERFORMANCE-BASED SALARY INCREASES:*

Merit increases will be determined based on an attached rubric that evaluates employee performance and growth over the review period. Employees must achieve an overall rating of "Meets Expectations" or higher in each review category to qualify for salary increases. Base salaries will not exceed the maximum of the classified pay band. Temporary employees are not eligible for annual salary increases.

#### *FINAL CONSIDERATIONS:*

This Annual Employee Assessment policy ensures that employee evaluations are aligned with the County's mission and reward employees for their growth over the review period. All evaluations will adhere to the County's Equal Employment Opportunity policies, ensuring assessments are based solely on objective, performance-related factors.