

Board of County Commissioners Agenda Request

Date of Meeting: April 11, 2006
Date Submitted: April 5, 2006
To: Honorable Chairman and Members of the Board
From: Parwez Alam, County Administrator *PA*
Lillian Bennett, Director of Human Resources
Subject: Approval to Award Transitional Bonuses to Career Service, EMS and Executive Support Employees and Adoption of Revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 - Pay Plan and Section 9.01- Employee Performance Appraisal

Statement of Issue:

This agenda item requests Board approval to award Transitional Bonuses to Career Service, Executive Support Service and Emergency Medical Services Employees and adopt revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 - Pay Plan (Attachment #1) and Section 9.01 Employee Performance Appraisal (Attachment #2).

Background:

Since March of 1988, annual, lump sum meritorious awards have been distributed to reward Career Service employees who have achieved "Exceeds" or "Outstanding" on their latest performance evaluation. In 1999, the Board determined that they would no longer award a merit bonus to employees who receive a "Meet Expectations" on their performance evaluations and would continue awarding those who are rated as "Exceed Expectations" or "Outstanding." In FY 04/05, a \$600.00 merit bonus was awarded to those Career Service employees who achieved "Outstanding" and \$400.00 for those with "Exceeds Expectations."

In FY 200~~4~~⁵/200~~5~~⁶, Merit Pay awards ranged from \$116.67 to \$600.00, for a total cost of \$151,266 (45 employees rated as "Outstanding" and 339 employees rated as "Exceeds Expectations"). A total of 384 Career Service employees received merit pay, representing approximately 70% of the total Career Service employees. Human Resource studies reflect that approximately 10-20% of a workforce perform at an exceptional level. Leon County's percentage is considerably higher. To address a number of issues concerning the performance evaluation system and pay process, a work team studied various approaches to employee evaluations and made a recommendation on a new system. A status report was presented and approved by the Board at the September 20, 2005 meeting (Attachment #3).

Agenda Request: Approval to Award Transitional Bonuses to Career Service, EMS and Executive Support Employees and Adoption of Revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 – Pay Plan and Section 9.01- Employee Performance Appraisal
April 11, 2006

Page 2

On January 13, 2006, the Board approved an agreement with Halogen Software as the vendor to implement the County's On-Line Employee Performance Appraisal System (Attachment #4). The on-line Employee Performance Appraisal System is scheduled to be phased in on October 2006.

Analysis:

The new Employee Performance Appraisal System (EPA) became effective on October 1, 2005. The EPA includes new rating categories and rating scale. (Excelling, Fully Competent, Development Needed and Unacceptable). Employees with appraisal review dates due after October 1 have been evaluated under the new EPA system. Those employees with appraisal review dates prior to October 1 were evaluated under the old appraisal system. As a result of the two evaluation systems, the traditional merit pay bonus amount of \$400 and \$600 is no longer applicable. Accordingly, staff is requesting a one-time transitional bonus in the amount of \$300 for all eligible employees.

FY 2005/06 Transitional Bonus -- The \$300 transitional bonus will be awarded to eligible Career Service, Executive Support Service and Emergency Medical Service employees. Senior Management and Temporary Service employees are not eligible for the transitional bonus. Eligibility will be based on employees obtaining a rating of "Fully Competent" or above under the new EPA system or a rating of "Meet Expectations" or above under the old appraisal system. A total of 534 Employees are eligible for the transitional bonus. At \$300 per employee, the total cost of the FY 2005/06 bonuses will be approximately \$150,832.00.

The transitional bonus award will be made in accordance with the attached Guidelines for the Administration of the Transitional Bonus (Attachment #5) and is based on the employee's most recent annual or probationary performance evaluation, prepared for the April 1, 2005 through March 31, 2006, evaluation cycle. The transitional bonuses are scheduled for distribution in April 2006. Currently, funds are available in the Reserve for Pay Adjustments account for this purpose.

Performance Bonus - In accordance with the new EPA system, a Performance Bonus will replace the traditional merit pay bonus after April 2006. The Performance Bonus is intended as a means of rewarding Career Service, Executive Support or EMS employees for meritorious performance that includes noteworthy service in providing work unit services, accomplishing work unit goals or outstanding service to citizens. The performance bonus is also designed to encourage careers with the County, to provide employees incentive, and to recognize individual differences in performance of employees. The Performance Bonus is not automatic, but must be based upon a written performance evaluation of the employee in accordance with the County's performance review system. To be considered for the Performance Bonus, the employee must have an "Excelling" score on their annual performance evaluation. However, the "Excelling" score does not guarantee that the employee will receive the Performance Bonus but only that the employee is under consideration for the Performance Bonus.

Agenda Request: Approval to Award Transitional Bonuses to Career Service, EMS and Executive Support Employees and Adoption of Revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 – Pay Plan and Section 9.01- Employee Performance Appraisal
 April 11, 2006
 Page 3

Division Directors will recommend employees for the bonus and Department Directors will be responsible for the final selection. Each department will have a prorated share of available funds based upon total FTE positions within the department. The Department Directors will have flexibility in developing a selection process and in the distribution of funds based on criteria outlined by Human Resources. The maximum bonus amount awarded per employee will be \$1,200.00 with a minimum bonus amount of \$600.00. Staff estimates that approximately 15% or a minimum of 112 employees will receive a performance evaluation score at the "Excelling" level and potentially be eligible for the bonus. The total estimated cost impact of the Performance Bonus at \$1,200 each is \$135,000 annually. Unlike the old appraisal and merit system, since the funds allocated are based on total FTE positions, the total dollars expended should remain relatively constant in future years. The new Performance Bonus is scheduled for award in December 2006 and will be brought to the Board for final approval.

Pay for Performance - In addition to the Performance Bonus which rewards employees with outstanding and exemplary accomplishments, the new EPA system includes a "Pay for Performance" component with the objective of relating employee pay to their performance. The "Pay for Performance" component of the EPA system will be effective with annual increases approved in the FY 2006/07 budget.

Career Service employees may receive an annual pay increase based on performance. The purpose of this increase is to recognize and reward those employees who are "Fully Competent" or "Excelling" in their positions during the rating period. The amount of the performance pay will be determined annually by the Board of County Commissioners. Staff is recommending that employees who are rated as "Development Needed" receive a cost of living increase which is 2% less than the increase approved for "Fully Competent" and "Excelling" categories. Performance pay increases are not guaranteed and may vary in amount contingent upon funding availability and annual Board approval. Senior Management, Executive Support Service and EMS salary increases will be determined annually by the County Administrator. For Career Service employees, the proposed rating schedule for pay for performance is as follows:

Table 1
Proposed Pay for Performance Annual Increase,
Career Service Only
Effective 10/1/06

Rating Category	Rating Range	Proposed Pay Increase 10/1/06
Unacceptable	0.00 - .99	No pay increase; usually, employee would not be retained
Development needed	1.00 - 1.99	Cost of living increase/2% less than Board approved amount
Fully competent	2.00 - 2.79	Increase voted by the Board to exceed the cost of living increase
Excelling	2.80 - 3.00	

Agenda Request: Approval to Award Transitional Bonuses to Career Service, EMS and Executive Support Employees and Adoption of Revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 – Pay Plan and Section 9.01- Employee Performance Appraisal
April 11, 2006
Page 4

In summary, staff requests Board approval of the FY 2005/06, \$300 transitional bonus for Career Service, EMS and Executive Support employees. In addition, staff request Board approval of policies related to implementation of the new Employee Performance Appraisal System which includes the annual "Pay for Performance" and Performance Bonus components by formally adopting revisions to Section 5.01 – Pay Plan and Section 9.01- Employee Performance Appraisal of the Leon County Polices and Procedures Manual.

Options:

1. Approve the award of a \$300 Transitional Bonus to eligible Career Service, Emergency Medical Services, and Executive Support employees.
2. Adopt the revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 – Pay Plan and Section 9.01- Employee Performance Appraisal in accordance with the new Employee Appraisal System, which includes the "Pay for Performance" and Performance Bonus components.
3. Do not approve the award a \$300 Transitional Bonus to eligible Career Service, Emergency Medical Services, and Executive Support employees
4. Do not adopt the revisions to the Leon County Personnel Policies and Procedures Manual, Section 5.01 – Pay Plan and Section 9.01 Employee Performance Appraisal.
5. Board Direction

Recommendation:

Options #1 and #2.

Attachments:

1. Proposed revisions to Section 5.01 – Pay Plan, Leon County Policies and Procedures Manual
2. Proposed revisions to Section 9.01- Employee Performance Appraisal. Leon County Policies and Procedures Manual
3. Board Agenda Item dated September 20, 2005 on Status Report on New Performance Appraisal System
4. Board Agenda Item dated January 16, 2006 on approval of Halogen Software for the new on-line Performance Appraisal Program (without attachments)
5. Guidelines for Administration of Transitional Bonus

**SECTION V
PAY PLAN**

5.01 Contents

The procedure for establishment, maintenance, and administration of an equitable pay plan shall be applicable to all positions. The salary schedules shall include the minimum and maximum rates of pay for all skill levels. For EMS, in addition to the salary schedule, the pay plan includes shift differentials and Special Pays. The guidelines for EMS shift differentials and special pays can be found in the Emergency Medical Services Standard Operating Guidelines Manual. When an employee reaches the ceiling of a salary range they are "red circled" and receive no additional pay increases until the pay grade schedule raises the maximum above the employee's salary or through other Board action.

5.02 Administration

The Human Resources Division shall maintain the salary schedule which includes the EMS shift differentials and special pays. This includes conducting a general salary survey periodically from which recommendations may be made to adjust the schedules. The salary survey shall consider prevailing pay rates and fringe benefits within the appropriate market.

When approved by the Board, the Pay Plan shall constitute the County's pay schedule for pay grades of all positions, EMS shift differentials and special pays shall become effective as designated.

5.03 Changes in Pay

5.03.1 Promotion

Upon a promotion of one grade level, the employee will receive 5% or will be placed at the new grade minimum which ever is greater. Upon a promotion of two grade levels, the employee will receive 10% or will be placed at the new grade minimum which ever is greater.

In no case will the promotional increase place an employee's salary above the maximum of the assigned pay grade, even if this results in less than a 5% increase.

5.03.2 Demotion

Upon demotion for cause, the employee's salary will be placed on the new pay grade level at a rate determined by the Department Head based upon the recommendation of the Human Resources Director.

If the adjusted salary is above the maximum of the lower grade, the salary will be red circled until changes in the pay grade schedule raise the maximum above the employee's salary.

5.03.3 Transfer to Lower Classification

An employee may be transferred to a position in a lower pay grade, without cause, and without a pay reduction, and the transfer may not be considered a demotion if the transfer is voluntary or if it is the result of the employee's position being terminated. The employee shall not be eligible for a subsequent promotional pay increase if the employee is later transferred to a position in a pay grade equal to the position occupied prior to the initial transfer as a result of a merit promotion for a period of two years. The employee shall be eligible for pay adjustments as they occur annually. Employees placed in a higher pay grade as a result of competitive selection shall have pay established in accordance with Competitive Initial Placement.

5.04 Educational Attainment Compensation

Benefits-eligible full-time and part-time employees with two years of service earning diplomas or degrees (GED, associate, bachelor, masters, doctorate) or professional certification, in job-related areas may be eligible to receive a 5% pay increase for each job-related diploma, degree, or certification above that required for the position at the time the employee was hired into the position. The maximum lifetime educational compensation benefit is 10%. No additional compensation will be approved for educational attainment once the 10% maximum has been reached. Employees who participate in the Tuition Assistance Program will not be eligible to participate in the Educational Attainment Compensation Program.

All diplomas, degrees or certifications considered for educational attainment increases must be completed while employed with Leon County. Requests for educational attainment increases must be received within six (6) months of completing the degree, diploma or certification. No retroactive pay increases will be granted for degrees, diplomas, or certifications completed prior to initial placement in the current position.

Employees contemplating completion of education or certification to qualify for educational attainment compensation should consult with their supervisor or Department/Division Director and the Human Resources Division to determine whether the education or certification is eligible for educational attainment compensation. In cases where an employee was previously enrolled in a certification, diploma or degree program, the eligibility for educational attainment compensation will be determined by the Human Resources Director and the Department/Division Director on a case-by-case basis.

Pay Plan

The qualifying criteria for educational attainment compensation shall have a direct relationship with either the employee's present position or preparation for a promotional opportunity, and shall be determined by the Human Resources Director after consultation with the respective Department/Division Director. Diplomas, degrees, or certifications used for educational attainment compensation must have a study requirement or study guidelines for completion. The study required must be at least 42 clock hours. The diploma, degree, or certification must also include an assessment of knowledge or skills required for successful completion. Class time without assessment is not sufficient. Diplomas or degrees must be from an educational institution that is accredited by one of the accrediting bodies approved by the U. S. Department of Education.

Educational Attainment Compensation is not an entitlement and is contingent upon the availability of funds.

In no case will an educational attainment increase place an employee's salary above the maximum of the assigned pay grade.

All educational attainment compensation must be approved by the County Administrator. The effective date of the salary increase shall be the date of approval.

This policy will become effective immediately, regardless of when certification or degree was obtained.

5.04.1 Procedure: Educational Attainment

Leon County encourages employee development and knowledge expansion.

After employment, should an employee obtain a job related higher level of education the supervisor shall request proof of attainment. This proof is presented through line management to the Human Resources Director with a letter of justification for salary adjustment. The Human Resources Director will evaluate the request in accordance with County policy, and will make a recommendation to the County Administrator. The line management is notified of the disposition of the request by the Human Resources Director.

5.05 Merit Pay - Performance Bonus

Merit pay The Performance Bonus is intended as a means of rewarding ~~an~~ a Career Service, Executive Support or EMS employee for meritorious performance, to encourage careers with the County, to provide employees incentive, and to recognize individual differences in performance of employees. Merit pay The Performance Bonus is not automatic, but must be based upon a written performance evaluation of the employee in accordance with the County's performance review system. To be considered for the Performance Bonus, the employee must have an Excelling score on their performance

Pay Plan

evaluation. However, the Excelling score does not guarantee that the employee will receive the Performance Bonus but only that the employee qualifies for consideration of a Performance Bonus. Division Directors will recommend employees for the Performance Bonus and Department Directors will be responsible for the final selection. The annual bonus amount will be determined annually and may vary in amount contingent upon funding availability.

If funds for the purpose of awarding merit payments the Performance Bonus are appropriated by the Board, the Board shall determine the timing and range of amount for the award of the Performance Bonus merit payments.

5.06 Annual Salary Adjustments

Applicable to Career Service positions only.

The Human Resources Director will recommend to the County Administrator, for approval by the Board, any adjustments in the salary structure or segments of the salary structure and levels of such adjustments.

Performance Pay

Career Service employees may receive an annual pay increase based on performance. The purpose of this increase is to recognize and reward those employees who are Fully Competent or Excelling in their positions during the rating period. The amount and timing of the performance pay will be determined annually by the Board of County Commissioners. Employees who are rated as Development Needed will receive a cost of living increase which will be less than the increase that is approved for the Fully Competent and Excelling categories. Performance pay increases and cost of living increases are not guaranteed and may vary in amount contingent upon funding availability.

Senior Management, Executive Support and EMS salary increases will be determined annually by the County Administrator.

In temporary (O.P.S.) positions of longevity or seasonal return the employee may meet the requirements of annual salary adjustment movement, when the incumbent has been in the same position at least six (6) months prior to salary adjustment period or the incumbent has returned for three (3) consecutive seasons with total employment of six (6) months or more.

5.07 Other Pay Adjustments

It is anticipated that the needs of employees and departments will be met within the framework of the Wage and Salary Program; however, should unforeseen circumstances occur which may be considered in the best interest of the County, the Department Head may request a rate adjustment. This request may be submitted through the Human

**SECTION IX
EMPLOYEE PERFORMANCE APPRAISAL**

9.01 Purpose

The Employee Performance Appraisal System provides to employees, descriptions and evaluations of work expectations. The current system is an enhancement of a 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:

- * Core Values measured
- * Supervisory and management skills measured
- * Standards tied to Job Description Questionnaire (JDQ)
- * Automatic calculations
- * Weighted measures

This section establishes procedures for appraising Career Service, Executive Support and EMS employee performance, completing the Employee Performance Appraisal System Form, and processing the form. Detailed instructions for the appraisal system are contained in the Leon County Employee Performance Appraisal System Handbook, which can be found on the County Intranet site. ~~Generally, the same appraisal process is used for all County employees.~~ (Time tables will differ based on the type of appraisal being conducted.)

This section does not pertain to Senior Management employees. Senior Management employees will be assessed on the basis of their accomplishments and continuous improvement efforts 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 probation or trial period.
2. Extension of Probation Period - At time of request for extension.
3. Annual - One year from date of last review.
4. Special - Beginning at end of special probation or when performance substantially dropped during a review period.

**SECTION IX
EMPLOYEE PERFORMANCE APPRAISAL**

5. **Change in Classification** -Promotion/demotion/transfer, etc.
6. **Separation** - Separation from County service, when it has been more than nine (9) months since the affected employee's performance has been evaluated.

9.03 Responsibility for Appraisal

The first week of each month, the Human Resources Division will notify Department Directors and Division Directors of employee appraisals due to be completed by the end of the month. The Performance Appraisal System Form (See template copy in Appendix M) shall be completed by the employee's immediate supervisor, be reviewed by the next level Supervisor, and then by the Division Director ~~Department Director~~ (or designee); be signed by the employee; and returned to Human Resources.

At six-month intervals the Human Resources Division will also notify Department and Division Directors of performance progress reviews due. These reviews are informal sessions where the employee and the supervisor meet to discuss the employee's status on performance standards and job tasks and contributions to unit work goals.

9.04 Completion of the Employee Performance Appraisal System Form

The Employee Performance Appraisal System Form (See County Intranet site) is used for Performance Planning, the Progress Review, and the Performance Appraisal. The directions included in the form should be followed precisely.

9.04.1 Performance Planning

The performance plan is a combination of the common factors and major functions. The common factors portion of the performance appraisal form contains one section to be used for all employees who are appraised-Career Service, Executive Support or EMS employees. A second section of common factors is for the Career Service, Executive Support or EMS employees who manage people or programs.

The major functions portion is for capturing any major functions that are not adequately addressed by the common factors. These major functions should be tied to the responsibilities outlined in the Job Description Questionnaire (JDQ). The JDQ should be kept current so that the employee's major functions reflect the functions that are important to carry out the major goals and objectives of the work unit.

Employee Performance Appraisal

This phase is conducted at the beginning of the appraisal period according to the following schedule:

Type of Employee	Planning Session Time
<u>Career Service and Executive Support</u> Employees hired prior to October 1, 1975	On or about <u>January 1</u> October-1
All other ongoing employees	On or about <u>first day of the month of employment in the current job classification</u>
New hires, promotions, reassignments- <u>Career Service, Executive Support and EMS employees hired on or after 10/1/75 as well as promotions and reassignments</u>	Within two weeks of the employment date <u>two months of beginning of new employment, new evaluation period or new promotion</u>
Executive and Senior Management	Month of October

The steps to the Performance Planning process can be found in the Employee Performance Appraisal System Handbook located on the County Intranet site.

The Performance Planning process includes the following steps:

1. The supervisor conducts the Performance Planning Session with the employee to develop job tasks and performance standards. The supervisor lists the job tasks and accompanying performance standards in the appropriate section of the Employee Performance Appraisal System Form.
2. The next level supervisor, the Division Director and the Group Director (or designee) review the job tasks and performance standards.
3. The employee, supervisor, Division Director, and Group Director (or designee) sign the form to indicate approval.
4. The employee receives a copy of the performance plan.
5. The Group Director (or designee) sends the performance plan and a copy of the sign-off page to the Human Resources Office. A copy is kept in the employee's records in the respective Department.

9.04.2 The Progress Review

Employee Performance Appraisal

A Progress Review session is a meeting between the supervisor and the employee to determine, informally, the employee's performance since the plan was developed. 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 is required six months into the appraisal year. 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.

The steps to the Progress Review process can be found in the Employee Performance Appraisal System Handbook.

A progress review is conducted midway through the appraisal period using the following steps:

- ~~1. The supervisor meets with the employee and discusses progress to date on job tasks and accompanying performance standards. Any areas of needed improvement are identified and recommendations for improvement are developed. Also, changes to performance standards may be made.~~
- ~~2. The supervisor and the employee sign the Employee Performance Appraisal System Form to indicate that the midpoint discussion was held. The supervisor indicates on the form, whether changes are made to the performance standards.~~
- ~~3. If the performance standards changes are necessary at this point, the process for developing a performance plan is followed to develop and approve the changes.~~
- ~~4. A copy of the completed sign-off sheet and any changes to the performance plan are sent to the Human Resources Office immediately following the performance review. A copy of any changes is given to the employee and a copy is kept in the employee's records in the Department.~~

9.04.3 The Employee Performance System Appraisal

The performance appraisal is conducted using the following schedule:

Type of Employee	Conduct Performance Appraisal
------------------	-------------------------------

Employee Performance Appraisal

1	<u>Career Service and Executive Support</u> Employees hired prior to October 1, 1975	October 1-January 1
2.	<u>Career Service, Executive Support and EMS</u> Employees hired on or after October 1, 1975	First day of the month of most recent employment
3.	Employee is promoted, demoted, reinstated, reclassified, or transferred within sixty (60) days prior to his or her annual Performance Appraisal date	Group Director may delay the performance appraisal for up to one hundred twenty (120) days to allow time for the supervisor to properly evaluate the employee in the new position
4.	Executive and Senior Management	Month of October

Prior to the Performance Appraisal Interview

- The supervisor rates each performance standard, entering the whole number rating on the Employee Performance Appraisal System Form as follows:
 - 0 = ~~Below Expectations~~ Unacceptable
 - 1 = ~~Meets Expectations~~ Development Needed
 - 2 = ~~Exceeds Expectations~~ Fully Competent
 - 3 = ~~Outstanding Performance~~ Excelling

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 narrative portions of the form except for the justification for the overall score.
- The supervisor lists areas which need improvement along with recommendations for improvement. Notable performance by the employee is listed also.
- The next-level supervisor, and the Division Director ~~and the group Director (or designee)~~ reviews the partially completed appraisal, collaborating with the supervisor to resolve any areas of disagreement.
- The supervisor, and Division Director ~~and Group Director (or Designee)~~ sign the appraisal to indicate agreement.

During and Following the Performance Appraisal Interview

Employee Performance Appraisal

6. The supervisor conducts the Performance Appraisal Interview with the employee to discuss the level of performance on each performance standard. The employee is encouraged to bring evidence of performance to this interview.
7. ~~After the discussion is completed, the supervisor computes the job task ratings and the overall performance appraisal score. This step may be conducted outside of the interview. The performance standards ratings are averaged to get the job task rating. The job task ratings are averaged to get the overall performance appraisal score.~~ The following rating scale is used for interpreting the averaging of scores:

Below Expectations <u>Unacceptable</u> =	0 - .99
Meets Expectations <u>Development Needed</u> =	1 - 1.99
Exceeds Expectations <u>Fully Competent</u> =	2 - 2.79
Outstanding Performance <u>Excelling</u> =	2.80 - 3

8. The supervisor enters the calculations on the performance appraisal form and provides justification for the performance level.
9. The employee signs the performance appraisal.
10. The Group Director (or designee) distributes the completed Employee Performance Appraisal System Form as follows:

Original to the Human Resources Office via the Group Director.

Copy to the employee.

Copy to the employee's file in the Department.

9.05 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 form in the County's Human Resources files. Performance Appraisals are not grievable.

Back **Print**

Board of County Commissioners Agenda Request 7

Date of Meeting: September 20, 2005

Date Submitted: September 14, 2005

To: Honorable Chairman and Members of the Board
From: Parwez Alam, County Administrator
Lillian Bennett, Director of Human Resources
Subject: Status Report on New Performance Appraisal System

Statement of Issue:

This item provides a status report on the new performance appraisal system for career service and executive support employees (Attachment #1).

Background:

Since 1996, employees in the Board of County Commissioners organization have used a performance appraisal system that lists specific job tasks and standards. Job tasks are rated using the scores of "below expectations (0)", "meets expectations (1)", "exceeds expectations (2)", and "outstanding (3)." The task ratings are then averaged to get the overall score. Following are the current overall score categories:

**Table 1
Current Performance Appraisal System Score Categories**

Score Category	Range
Below Expectations	0 - .99
Meets Expectations	1.00 - 1.99
Exceeds Expectations	2.00 - 2.79
Outstanding	2.80 - 3.00

Corrective employee action plans are required for all employees with task ratings below 1.00. These plans are monitored during the appraisal year to ensure performance improvement. Until July 1, 2005, this system was used for all full-time Board employees. Beginning July 1, senior management employees are appraised on the basis of program and professional accomplishments using a less formal system.

For career service employees, the overall scores are used to determine eligibility for merit pay bonuses. Employees who score at least 2.00 on the performance appraisal have been awarded merit increase bonuses since 1997. Career service employees with scores in the range, 2.00-2.79 received \$400 and those in the range, 2.80-3.00 received \$600.

A review of appraisal ratings from April 1, 2004 to March 30, 2005, revealed that 71% of career service employees met the requirement for merit pay. That percentage included 336 in the "exceeds" category and 44 in the "outstanding" category.

Analysis:

Reviews of the current employee performance appraisal system revealed at least the following shortcomings:

- All tasks were assigned equal weight.
- Supervisory/managerial skills were often not measured.
- Organization core values were not measured.
- Standards were not tied to job descriptions.

New Appraisal System. To address the above issues, a work team studied various approaches to employee performance evaluation. On October 1, 2005, a new system which incorporates many of the team findings and addresses the aforementioned shortcomings will be instituted for career service and executive support employees. The new system will incorporate the following:

- Common rating factors.
- Common factors for supervisors and program managers.
- Assigned weights for all measures.
- Flexible major functions tied to specific jobs.
- Connections between major functions and job descriptions.
- Connections between core values and common rating factors.

As of February 2006, the new system will be totally web-based and generate very little paper. Managers will rate employees online, and approve ratings via the use of electronic signatures. Employees will view appraisals online and add online comments, as desired. Paper copies may be printed but will not be required (except for employees who do not have online access). In the interim, 10/1/05 – 1/31/05, managers will use an EXCEL paper form that will have all of the content characteristics mentioned in the listing above, but will be transmitted via hard copy.

All employees will have consistent measures on factors such as communications, initiative, and dependability. All supervisors and managers will be rated on standard management measures. The common factors will not vary. However, divisions will have the flexibility of adding major functions that are tied to specific jobs. The divisions may weight these functions as desired on a scale of 1 to 5, with 5 indicating that the function is essential to the performance of the job.

Individual factors and functions will be rated using "unacceptable (0)", "development needed (1)", "fully competent (2)", or "excelling (3)." The overall score of the appraisal will be a weighted average. The overall score categories for the new system are as follows:

Table 2
New Performance Appraisal System Score Categories

Score Category	Range
Unacceptable	0 - .99
Development Needed	1.00 - 1.99
Fully Competent	2.00 - 2.79
Excelling	2.80 - 3.00

Merit Pay 2006. For the April 2006 Merit Pay, eligibility will be based on the current performance appraisal system scores for some employees and on the new system scores for others. Because of the change in definitions for the new system, the "fully competent" range will include both employees who scored 1.00 – 1.99 and who scored 2.00 – 2.79 under the current system. Therefore, for this transitional period, employees with 1.00 – 1.99 under the current system and employees who score 2.00 – 3.00 under the new system will both be eligible for merit. This inclusion will significantly increase the number of persons receiving merit pay. In recent years, persons with scores of 2.00 – 2.79 received \$400 bonuses and those with scores of 2.80 – 3.00 received \$600 bonuses. With the increased numbers, the total projected cost is \$219,600, up from the \$149,466 expended in April 2005. To limit the increase in costs, the Merit Pay bonus could be reduced to \$300 for all recipients. At \$300 per recipient, the total cost would not exceed \$160,200.

Performance Bonus Proposal. The merit pay bonus has been budgeted for FY 2005-06. The agenda item for that bonus will be presented in April 2006. It is proposed that a performance bonus replace the merit pay bonus after April 2006. The new bonus would be for noteworthy service in providing work unit services, accomplishing work unit goals, or outstanding service to citizens. The pool for selecting recipients of this bonus would be career service and executive support employees who had overall scores in the "excelling" category. Each department would select recipients from those nominated by divisions. Each department would have a prorated share of available funds and would have the

ew Agenda

ibility of distributing the funds. This proposal will be presented for funding in the FY 2006-07 budget.

for Performance Proposal. In reviewing the large number of employees who received merit pay bonuses, it is noted that, in addition to rewarding outstanding exemplary accomplishment, employee pay should reflect performance. For the FY 2006-07 budget, a proposal will be presented to tie employee performance to employee pay. For career service and executive service employees, the proposal may be as follows:

Table 3
Proposed Pay for Performance Increase, 10/1/06

Rating Category	Rating Range	Proposed Pay Increase 10/1/06
Unacceptable	0.00 - .99	No pay increase; usually, employee would not be retained
Development needed	1.00 - 1.99	Cost of living increase
Fully competent	2.00 - 2.79	Increase voted by the Board to exceed the cost of living increase
Excelling	2.80 - 3.00	Increase voted by the Board to exceed the cost of living increase

- Options:**
- Accept the status report on new County Performance Appraisal System.
 - Do not accept the status report on the new County Performance Appraisal System.
 - Board direction.

Recommendation:
Option #1.

Attachment:
Employee Performance Appraisal System Form

[Back](#) [Print](#)



Leon County Employee Performance Appraisal Form

OVERALL APPRAISAL RATING

Beginning Date: #DIV/0!

Ending Date: #DIV/0!

Please complete boxed areas only. Questions? Call HR (487-2220) or review handbook.

EMPLOYEE INFORMATION

Last Name First Name M.I. POSITION #

Title ID #

WORKPLACE INFORMATION

Department Division Program

Attachment # 9

Page 18 of 31

REVIEW TYPE

New Standards Probationary/Trial Midpoint Annual Classification Change

Special Separation

Standards were last modified: date

Immediate Supervisor Signature:

Other Supervisor Signature:

Division Director Signature:

Department Director (or designee) Signature:

Employee Signature:

COMMENTS BY REVIEWERS
(Required for all Unacceptable (0.00 - .99) and Excelling (2.8 - 3.00) ratings. For Excelling (2.8-3.00) ratings, note specifically what was done above and beyond the requirements of the job. May be used for other rating also.)

COMMENTS BY EMPLOYEE
(Optional)

EMPLOYEE ACTION PLAN
Include specific projects, performance objectives or training development plans for the review period. They may be based on new assignments and/or substandard performance.

Attachment # 9
Page 20 of 31

Goal to be Achieved/Substandard Performance Addressed (describe)	Action to be Taken	Due Date	Date Completed

EMPLOYEE PERFORMANCE COMMON RATING FACTORS

I. All Employees

The factors below are to be rated for all employees. More detailed descriptions of each factor are included in the appraisal handbook.

EXCELLING 3	FULLY COMPETENT 2	DEVELOPMENT NEEDED 1	UNACCEPTABLE 0	WEIGHT 5=highest 1=lowest	SCORE	TOTAL W X S	Not Rated
A. Communications							
The ability to convey knowledge, information and ideas clearly and accurately.	Almost always anticipates need to communicate information. Demonstrates above average communication problem solving skills. Is Always pleasant and helpful even with argumentative persons in challenging and difficult situations. Promotes tension-free work environment. Always treats fellow employees with respect.	Consistently gives and receives information effectively. Clearly presents ideas/tasks to groups/individuals. Actively listens to others, demonstrating respect, attention to, and an understanding of expressed comments and concerns.	Gives and receives information that is at times inaccurate and incomplete. Is occasionally impolite or abrupt. Does not maintain a balance between telling and listening.	3		0	
B. Teamwork							
The act of achieving common goals and the ability to organize work in an atmosphere of cooperation and interdependence.	Almost always provides open, constructive, professional and courteous communication at team/work group meetings and in daily interaction with staff and customers. Exhibits courteous and helpful attitude towards customers and team/work group members. Considers the needs of the organization, customers and employees a priority. Demonstrates effective conflict/dispute resolution skills. Promotes good relations; contributes more than "fair share" to team/work group efforts; takes initiative to offer help to others. Willingly shares information others need. Fosters teamwork and group morale.	Consistently provides open, constructive, professional and courteous communication at team/work group meetings and in daily interaction with staff and customers. Uses constructive criticism to assist team in maintaining good order, discipline or morale. Gets along well with others; tolerant of others' point of view; cooperative, offers positive and constructive input to team/work group efforts; willingly assists others when needed. When requested, will share information with others.	Occasionally provides open, constructive, professional and courteous communication at team/work group meetings and in daily interaction with staff and customers. Needs to work to resolve disputes and conflicts with others before they escalate. Needs to improve upon use of constructive criticism to assist in team/work group development and/or morale. Sometimes displays intolerance towards differing point of view, may challenge others inappropriately in public. Sometimes has to be reminded to do "fair share" for the team/work group effort. Reluctantly releases information others need.	3		0	
C. Customer Service							
The ability to identify customers, determine their need(s), and provide appropriate service.	Almost always makes attempts to meet customer needs, sometimes using creative approaches; is Always courteous, timely and professional in interactions with customers even in difficult situations. Takes the extra step to assure that customer service action plans are followed	Is consistently courteous, timely and professional in interactions with customers; usually follows established processes for meeting customers' needs.	Occasionally projects indifferent attitude; marginal delivery of service; inconsistent in delivering satisfactory service.	3		0	

9
2 of 31

		EXCELLING	FULLY COMPETENT	DEVELOPING	NEEDED	UNACCEPTABLE	WEIGHT	SCORE	TOTAL WXS	Not Rated
		3	2	1	0		5=highest 1=lowest			
D. Dependability	Can be relied upon to perform job duties in a timely and professional manner.	Almost always follows procedures; completes assignments as directed under pressure/time constraints. Can be relied on to handle non-routine situations without supervisory assistance; often anticipates and reacts to needs without direction.	Consistently follows routine procedures and completes assignments as directed. Needs only limited assistance in resolving procedural questions. Handles routine situations without supervisory assistance. Reters appropriate persons in a timely manner. Makes good use of time.	Does not always follow procedures and work as assigned. Shows improvement after correct procedures are explained. Requires assistance to handle routine situations. Requires close supervision on use of work time. Somewhat unreliable.	Rarely follows specific procedures. Unreliable, requires frequent follow-up, creates significant gaps in service delivery and/or places undue burden on other employees to get the work done.		3		0	
E. Initiative	Shows eagerness in seeking new challenges	Almost always pursues assignments with enthusiasm. Offers implementable suggestions or asks questions concerning ways to improve service or efficiency. Promotes teamwork by assisting others. Always contributes to the effectiveness of the work unit and the County. Completes work with minimal supervisory input; accepts new ideas and change; takes calculated risks.	Consistently demonstrates willingness to perform job tasks. Works with minimal supervision. Is cooperative with public, co-workers and supervisor. Contributes to the effectiveness of the work unit and the County. Completes work with a minimum of supervisory involvement; often receptive to new ideas and change with minimum encouragement; avoids risk.	Occasionally demonstrates willingness to perform job tasks. Supervision occasionally needed to prevent inefficient use of time or resources. Minimally contributes to the effectiveness of the work unit or the County. Requires frequent intervention of supervisor; usually not receptive to ideas; resists change.	Complains frequently about issues, work procedures, even after the rationale has been explained. Rarely attempts to correct errors or resolve problems. Assists others only when specifically directed. Supervisor is required to be frequently involved to assure that work is completed satisfactorily. Not receptive to new ideas; does not cope with change.		3		0	
F. Safety/Safeguarding	Demonstrates a high degree of care in protecting people, equipment, tools, and other County assets.	Works in a very safe manner and almost always follows safety procedures and guidelines. Not involved in any accidents and/or incidents involving the operation/use of County property. Always shows a high degree of care in the handling of monies, records, files, transactions, reports confidential information, etc.	Consistently works in a reasonably safe manner and generally follows safety procedures and guidelines. Shows care in the use, operation, and maintenance of County property. Demonstrates care in the handling of monies, recording financial transactions, record keeping, file maintenance, etc. Does not cause accidents/incidents.	Attempts to follow safety procedures and guidelines most of the time; may occasionally appear lax and inattentive about safety and/or caring for and safeguarding County property. Responds well to criticism in this regard. May have been involved in accident/incidents in which he/she was at fault.	Careless and possibly even reckless. Does not appear to learn from mistakes in safety. Has not shown responsibility in handling monies, financial records, or sensitive information.		3		0	

III. Supervisors/Managers Only
 The factors below are to be rated for supervisory and program managers. More detailed descriptions of each factor are included in the appraisal handbook.

	EXCELLING		FULLY COMPETENT		DEVELOPMENT NEEDED		UNACCEPTABLE		WEIGHT 5=highest 1=lowest	SCORE	TOTAL W X S	Not Rated
	3		2		1		0					
A. People Management Demonstrates the ability to achieve departmental goals through the management, motivation and empowerment of other County employees.	Almost always provides a work climate that encourages employee development, customer focus and teamwork. Always assesses and communicates employee performance; provides adequate direction to increase employee performance. Always communicates/reinforces values and performance expectation and encourages innovation. Delegates responsibility appropriately and invites staff input. Assigned staff function well together in pursuit of work unit/division goals.	Consistently provides a work climate that encourages employee development, customer focus and teamwork. Gets the basic management processes done according to County policies and procedures and timeliably (e.g. performance appraisals are done on time). No significant concerns or criticisms about management style. Regularly delegates responsibility appropriately. Assigned staff generally work well together, experiencing few, if any, problems in pursuit of work unit/division goals.	Struggling in the role of manager/supervisor of other people. Generally a good employee but experiencing difficulty in administration and/or overseeing the work of others. Seldom delegates responsibility appropriately. Frequent problems occur within the work group when in pursuit of work unit/division goals.	Ineffective supervisor. Personal goals are at odds with unit and/or County goals. Blocks innovation and communication. Does not delegate responsibility or delegates inappropriately. Serious problems exist within the work group when in pursuit of work unit/division goals.	3	0				0		
	B. Customer Focus Represents the County in a positive manner and involves customers in long term planning and/or initiatives.	Almost always represents the organization in a positive and professional manner. Anticipates customer concern about current services and operations and addresses those concerns proactively. Involves customers in planning services and operations, as appropriate.	Consistently projects a positive professional image to customers/citizens. Responds to others in a balanced, concerned manner. Focuses on the needs of key stakeholders as appropriate.	Occasionally projects indifferent attitude/image. Marginal and/or inconsistent in representing the County.	Negative image/role model. Discourteous; shows little interest in meeting the needs of the customer/community. poor follow-up; does not return calls; untimely service, or frequent customer/citizen complaints.	3	0				0	
C. Planning and Organizing Establishes and meets short and long term goals in a flexible manner.	Almost always sets direction within area of influence, aligned with unit/department/organization objectives. Always meets goals. Always reacts to changes in goals/directives with flexibility and responsiveness. Frequently develops plans to assure timely completion of assignments; organizes and coordinates assignments to avoid delays and repetitious work.	Consistently establishes and meets short and long term goals within reasonable time frames. Shows flexibility when plan fails; identifies/addresses challenges. Plans and organizes assignments. Solves problems. Generally develops plans to assure timely completion of assignments.	Struggling in establishing and meeting short and long term goals. Needs guidance in the elements of planning/execution. Needs help with scheduling tasks. Inrequently develops effective plans and assignments are usually late.	Exhibits a lack of willingness to be guided or guide themselves within any planning framework. Cannot respond effectively to unpredictable work events. Does not plan or organize and work is usually late as a result.	3	0				0		

23-4-31

<p>D. Problem Solving and Policy Application When solving problems, considers alternative, develops effective strategies and makes effective decisions.</p>	<p>Almost always anticipates problems and collects needed information in advance to make decisions. Makes correct decisions on important issues; not afraid to act independently when a decision must be made. Develops alternatives.</p>	<p>Consistently solves problems as they arise. Gathers facts when readily available before making key decisions. Makes timely decisions with good judgment. Weighs obvious alternatives.</p>	<p>Occasionally bases decisions on irrelevant information; does not always act timely; is generally able to define the symptoms but not the problem; procrastinates on difficult decisions; does not always evaluate alternatives.</p>	<p>Makes decisions without proper knowledge of facts or situations; delays decisions unnecessarily; does not handle routine problems independently; difficult decisions show poor judgment; does not identify alternatives.</p>	<p>3</p>	<p>0</p>
<p>E. Technical Knowledge and Expertise Demonstrates extensive overall technical knowledge/expertise and uses them to produce good work products and/or services.</p>	<p>Almost always has extensive knowledge/expertise in the areas of assigned work; uses expertise to provide a high quality level of work products and/or services.</p>	<p>Consistently uses knowledge/expertise required for the areas of assigned work; uses knowledge/expertise as assigned to meet work goals; produces acceptable work products and/or services.</p>	<p>Is inconsistent in the application of present technical knowledge/expertise needs to improve technical knowledge/expertise to be equipped to consistently provide required products and/or services.</p>	<p>Has very limited technical knowledge/expertise; usually does not attempt to improve knowledge or skills.</p>	<p>3</p>	<p>0</p>

III. Major Functions (Use Job Description Questionnaire.) List major functions from the Job Description Questionnaire. For each major function, list the tasks in the adjoining box. Assign weights. Rate performance on each function using the scale below.

	EXCELLING 3	FULLY COMPETENT 2	DEVELOPMENT NEEDED 1	UNACCEPTABLE 0
Use this scale for all Section III objectives or work projects.	Employee almost always exceeds stated expectations, showing good initiative and requiring little supervision	Employee consistently meets expectations showing initiative and requiring little supervision	Employee has accomplished some but not all expectations; requires significant amount of supervision and/or shows only limited initiative	Employee has accomplished little or none of the stated expectations

WEIGHT 5=highest 1=lowest	SCORE	TOTAL W X S	Not Rated
		0	

A. Major Function (from JDQ)

Below, list tasks for the above function.

22

Page 25 of 31

[Back](#) [Print](#)

Board of County Commissioners Agenda Request 6

Date of Meeting: January 24, 2006
Date Submitted: January 18, 2006

To: Honorable Chairman and Members of the Board
From: Parwez Alam, County Administrator
Lillian Bennett, Director Human Resources
Subject: Approval of the Licensing Agreement with Halogen Software, Inc for the Purchase of Software for Leon County's On-line Employee Performance Appraisal Program.

Statement of Issue:

This item seeks Board approval of the Licensing Agreement with Halogen Software, Inc as a sole source vendor for the purchase of a software solution for Leon County's On-line Career Service/Executive Support/EMS Employee Performance Appraisal (EPA) Program (Attachment #1).

Background:

On March 2005, Human Resources staff met with County Administration on the creation of a new on-line Performance Appraisal process to be implemented in the fall of 2005 for Career Services/Executive Support/EMS employees. The benefits of this new process will be to fully automate the performance appraisal system, standardize measures of core competencies, measure supervisory/ management skills, tie job related standards to the Job Description Questionnaire (JDQ) and automatically calculate the overall employee performance ratings. The County Administrator approved the proposed on-line Employee performance appraisal process and directed staff to proceed with implementation (Attachment #2). An agenda item was taken to the Board on September 20, 2005 to begin the New Employee Performance Appraisal System process (Attachment #3).

In April 2005, Management Information Systems (MIS) and Human Resources (HR) staff began the process to determine the EPA system functions and how best to provide the technical solution for an on-line performance appraisal process. The options considered were to build the system in-house or to research the availability of a software product that could be modified to accommodate the need of Leon County. With the assistance of a consultant hired by MIS, system function requirements of the EPA system were developed to determine what the system should/must "do" and "how" it should perform these functions (Attachments #4, #5 and #6). These requirements also provided the basis to develop an estimate of development time, cost analysis to build vs. buy the software, and a set of standards/guidelines to evaluate potential software vendors.

When the consultant was assigned the task of using the developed requirements to research the availability of software products that most closely met the needs of Leon County. The consultant researched software products and brought the five (5) vendor/product recommendations to the HR/MIS team. Presentations of the five systems were held (Knowledge Point, Halogen Software, Sungard SCT Banner, Perfect Software, and People-Talk) (Attachment #6).

Analysis:

The consultant and the HR/MIS team assessed the offerings of the five vendor/products to determine how the basic functional requirements were met and to compare pricing for licensing with an 800 employee base. Additionally, MIS explored the option of developing a custom solution using in-house staff and out-sourced resources. The outline provides the assessment and cost comparisons of the various options.

ON-LINE EMPLOYEE PERFORMANCE APPRAISAL SYSTEM		
VENDOR SOLUTIONS	ASSESSMENT	COST
Sungard-SCT	Current HR/Payroll Solution	N/A
	Does not offer a Performance Appraisal module.	
Perfectsoftware	Although web-enabled with pre-configured reports and employee self-service, it appeared to be weak in performance planning and appraisal.	\$40,000
People-Track	Although web-enabled with pre-configured reports and employee self-service, it appeared to be weak in performance planning and appraisal. In addition, the performance review module is primarily a scheduling function only.	\$48,000
Knowledgepoint	Product appeared to meet functional requirements.	\$50,000
Halogen Software	Product appeared to meet functional requirements. The on-site demonstration showed that this solution was more comprehensive and suited specifically to performance planning and appraisal.	\$35,599
	Note that Halogen's quoted price includes licensing, training, maintenance, and conversion services. Whereas, other vendor costs were only for licensing. Additionally, the price is in line with the project budget.	
CUSTOM SOLUTIONS	ASSESSMENT	COST
In-House Resources	Would require use of 3 existing positions with a business opportunity cost that other core business duties and responsibilities currently handled by existing positions would not be achieved. The cost to add 3 new positions to accommodate the development or handle existing duties and responsibilities would be approximately \$75,000 each (includes salary and benefits).	\$225,000
Out-Sourced Resources	Would require 3 consultants with HR appraisal expertise to develop the solution, document and create training materials, and to migrate maintenance to in-house staff in a year. Average cost for 1 year of 1 appropriately skilled consultant is \$200,000 (\$100/hr x 2000 hrs/year).	\$600,000

As the cost for in-house customer solutions with existing staff or out-sourced resources is considerably more than vendor supplied products, the HR/MIS team recommendation is to purchase a product that can be supported and augmented with existing MIS assistance for future custom reports. Additionally, the team recommends the Halogen software product as the solution for the County's on-line employee appraisal system as it is assessed to comprehensively meet HR's requirements. The quoted price of \$35,599 for licensing, training, maintenance, and conversion services is aligned with the existing budget in the Management Information System Internet Related Project IIP Account.

Halogen Software is the software developer, provides all technical support, and serves as the sole distributor of the performance appraisal software product. It is requested to acknowledge purchase of the software and on-going support through Halogen Software as a sole source.

Options:

iew Agenda

1. Approve the Licensing Agreement with Halogen Software, Inc., as the sole source vendor for the purchase of the on-line Employee Performance Appraisal system and authorize the chairman to execute.
2. Do not approve the Licensing Agreement with Halogen Software, Inc., as sole source vendor for the purchase of the on-line Employee Performance Appraisal system.
Board Direction.

Recommendation:
Option #1

Attachments:

1. Halogen Licensing Agreement
2. Staff Presentation to County Administrator
3. Status Report on New Performance Appraisal System
4. EPA Performance Appraisal (EPA) System Function Description
5. EPA Performance Appraisal System Workflow Description
6. Position Control Function Description
7. HR Performance Appraisal Vendor Systems Evaluation Recap

[Back](#) | [Print](#)

GUIDELINES FOR THE ADMINISTRATION OF TRANSITIONAL BONUS

1. All Career Service, Executive Support and EMS employees who were employed prior to October 1, 2005 are eligible for the Transitional Bonus.
2. All eligible employees who received an overall rating of "Meets", "Exceeds" or "Outstanding" on the old performance appraisal system and "Fully Competent" or "Excelling" on the new appraisal system on their most recent performance appraisal will receive the transitional bonus.
3. Individuals, who have been Career Service employees for ten (10) or more years, who leave County employment subsequent to their annual employment appraisal but prior to the award of the transitional bonus, shall be eligible for a single award for their most recent appraisal period prior to leaving County employment.
4. The transitional bonus will be awarded in the form of a lump-sum payment of \$300.00. (Part-time and employees who have been employed less than one (1) year would have their bonus pro-rated.)
5. The transitional bonus will be apportioned by the Human Resources Division to eligible employees on the basis of scores on the annual or probationary performance appraisal.
6. The transitional bonus will be distributed in April 2006 as a separate paycheck, other than the employee's regular bi-weekly or monthly paycheck.

AWARDS CHART
Transitional Bonus, APRIL 2006

PERFORMANCE RATING

1.0-3.0

Transitional Bonus

\$300.00

PRORATION CHART HOURS WORKED

ANNUAL HOURS WORKED

2080
1560
1040

PRORATION FACTOR

100%
75%
50%

PRORATION CHART FOR SERVICE LENGTH

START MONTH

April 2005 and Prior
May 2005
June 2005
July 2005
August 2005
September 2005
October 1, 2005 and After

PRORATION FACTOR

1.000
.917
.833
.750
.667
.583
Ineligible