

OLDHAM COUNTY WATER DISTRICT

CASE NO. 2023-00252

Response to Commission Staff's Post-Hearing Request for Information

Exhibit PH-2

Oldham District Annual Interviews

Exhibit PH-2

2022 Interviews



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/21/22	Period of Evaluation:	7/29/21 – 7/29/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.5
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.2
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.5
Section Score: 3.8	

Comments:

█ has a great deal of knowledge to perform █ job. █ attitude remains positive regardless of task and █ considers compliance to OCWD's policies.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.8
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.2
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.0
Section Score: 3.96	

Comments:

█ works with is co-workers well and has a good rapport. █ has adapted to multiple changes this year. █ does a good job of analyzing problems and trying to figure out the best solution.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Play an integral part of software upgrade and outsourcing of bill printing services.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to problem solve customer situation and how to reflect them in our system for tracking purposes.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.8	=	1.9
Behavioral Traits	37.5%	50%	x	3.96	=	1.98
Supervisory Factors	25%	N/A	x	N/A	=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.9

Comments:

█ is a key employee that keeps OCWD on track and operating smoothly. █ is very conscientious about the billing cycle and maintains a positive attitude.

SIGNATURES:

Supervisor: █ Date: 7/15/22
7/13/2022

Supervisor Name (print): █

CEO: █ Date: 7-25-2022

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: █ Date: 7/15/22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. | Play an integral part of upgrading our customer experience (ie. outsourcing our billing service including online billing). |

Item carried over from previous year - YES NO

2. | |

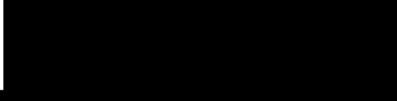
Item carried over from previous year - YES NO

3. | |

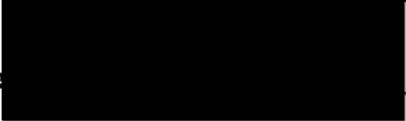
Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 7/15/22 |

Employee's Signature: 

Date: 7/15/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last)			
Job Title:			
Supervisor Conducting Review:			
Date:	3/25/22	Period of Evaluation:	3/22/21 to 3/22/22

INSTRUCTIONS TO RATER

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- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.3
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.2
Section Score: 3.43	

Comments:

████████ Knowledge, Skills and Abilities allow ██████ to exceed the company's expectations. ██████ operates the equipment with extreme care, services the equipment as needed and still can manage ██████ daily workload. ██████ is very productive and meets all deadlines on or before schedule.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.4
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.4
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.44	

Comments:

██████ is always willing to lend a helping hand sometimes too much, **██████** needs to train others so they will become more independent and will not relay on **██████**. **██████** works well with all employees. **██████** could improve on neatness/organization. I would like to see **██████** work area stay clean and complete **██████** paperwork at a timelier manner.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.0
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	3.0
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	3.3
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.0
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.3
Section Score: 3.32	

Comments:

██████ is a natural leader; ██████ needs to continue to exercise that ability. ██████ management style serves as a role model to others. ██████ needs to work one on one with ██████ service worker more than ██████ has in the past. They need more training.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review		
1. Project/Objective/Special Assignment Continue to Train on GIS Equipment to collect all new services, repairs, locates, to include Paperless Work Order System.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Improve Housekeeping/Organization in the Shop and Truck	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Train other employees in the Field and on New Projects to include Inspector and Specs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Complete Work Zone Traffic Control Technician Qualification Course	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.43	=	1.29
Behavioral Traits	37.5%	50%	x	3.44	=	1.29
Supervisory Factors	25%	N/A	x	3.32	=	.83
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 -- 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.41

Comments:

SIGNATURES:

Supervisor:  Date: 3/25/2022

Supervisor Name (print): 
 CE  Date: 3/31/22

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

 Date: 3-25-22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to implement the collection of all new services, repairs, etc. and paperless work order system**

Item carried over from previous year - YES NO

2. **Improve Housekeeping/Organization in the Shop and Truck**


Item carried over from previous year - YES NO

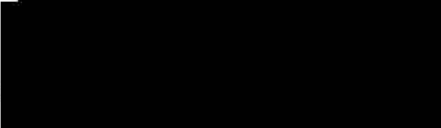
3. **Train Field employees on New Projects to include Inspector and Specs**

Item carried over from previous year - YES NO

4. **Complete Work Zone Traffic Control Technician Qualification Course**

Item carried over from previous year - YES NO

Supervisor's Signature:  Date: 3/25/22

Employee's Signature:  Date: 3 25-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date: 8/22/2020	9/6/22	Period of Evaluation:	8/22/20 ^{at} - 8/22/21 ^{3.2}

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

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- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.5
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.9
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 4.525	

Comments:

See page 6

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.8
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.9
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.0
Section Score: 4.54	

Comments:

See page 6

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.9
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.1
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.8
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.7
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.9
Section Score: 4.48	

Comments:

See page 6

Comments:

█ knows █ job very well and anything that is unfamiliar █ is more than willing to learn.

█ always completes █ assignments without having to be prompted. █ projects are always neat, and █ work areas/truck are very clean.

█ ability to perform █ work timely is unprecedented, and █ always has multiple projects to manage simultaneously.

█ follows the rules and never complains about additional tasks ask of █

█ is always polite and is always willing to listen without complaint.

█ ability to work well with others is exceptional. and █ is always a team player.

█ looks for ways to improve the OCWD over and above what should be required.

█ always has the Districts best interest at heart, even when it requires more effort on █ part. █ ability to solve difficult problems make █ an asset to this organization.

█ uses very little sick time, gives extra time frequently.

█ keeps is people working toward a common goal, and I believe they respect █ but I believe they sometime take advantage of █ good nature,

█ should continue to delegate more and require more from █ people; █ often completes assignments █ rather than having the employee complete it. I know this is done to facilitate getting the work done on-time and properly, but I believe █ should require █ people to step up more.

█ is always planning and if priorities change, █ is willing to do whatever is required to make sure all jobs are completed timely.

█ is a great role model for all employees, █ direction is clear and concise. But sometimes █ helps █ employees so much they may expect it, when they should complete more tasks on their own.

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.5	=	1.69
Behavioral Traits	37.5%	50%	x	4.54	=	1.70
Supervisory Factors	25%	N/A	x	4.48	=	1.12
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 – 4.4 EXCEEDS EXPECTATIONS	2.5 – 3.4 MEETS EXPECTATIONS	1.5 – 2.4 NEEDS IMPROVEMENT	1.0 – 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.51

Comments:

SIGNATURES:

Supervisor: _____ Date: _____

Supervisor Name (print): _____

CEO: _____ Date: 8/17/2022

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: _____ Date: 8-6-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	8/5/22	Period of Evaluation:	8/5/21 to 8/5/22

INSTRUCTIONS TO RATER

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- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are *required.*
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.5
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.7
Section Score: 3.425	

Comments:

██████ is Demonstrating Much Better Time Management Practices.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.8
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.2
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.8
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.7
Section Score: 3.60	

Comments:

█████ could improve on █████ truck cleanliness, but █████ other work area is neat and organized, █████ paperwork is precise and accurate. █████ always does what is asked of █████

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.</p>	
<p>Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?</p>	
<p>Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.</p>	
<p>Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?</p>	
<p>Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?</p>	
<p>Section Score: N/A</p>	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to gain knowledge of the distribution system, treatment plant, inventory, and policies of OCWD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Work towards becoming a [REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.425	=	1.71
Behavioral Traits	37.5%	50%	x	3.6	=	1.80
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.51

Comments:

SIGNATURES

Supervisor: _____

Date: 7-22-22

Supervisor Name (print): _____

CEO: _____

Date: 7-25-22

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature _____

Date: 7-22-22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to gain knowledge of the distribution system, treatment plant, inventory, and policies of OCWD**

Item carried over from previous year - YES NO

2. **Work towards becoming a [REDACTED]**

Item carried over from previous year - YES NO

3. **Complete Sacramento classes needed to obtain treatment license**

Item carried over from previous year - YES NO

4. [REDACTED]

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED] Date: 7-22-22

Employee's Signature: [REDACTED] Date: 7-22-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/24/22	Period of Evaluation:	7/24/21 to 7/24/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.7
Section Score: 3.50	

Comments:

██████ is very knowledgeable in the distribution field and is gaining a better understanding of the treatment side. █████ skills and abilities exceed the companies' expectations.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.7
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.3
Section Score: 3.50	

Comments:

████████ has a great sense of judgement. ████ considers the best way to repair the problem, ████ has the future in mind and is always thinking of the customers, attempting to reduce the inconvenience on them.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Train with an Inspector to assist on projects. Making sure they follow our Specs and complete the project.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2. Project/Objective/Special Assignment Train in the Treatment Plant to understand the MOR, Bac-T samples, Lead and Copper and the scheduled time to complete that task.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Project/Objective/Special Assignment Write an SOP for Disconnects, Flushing and Leak Detection	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. Train with an Inspector to assist on projects. Making sure they follow our Specs and complete the project

Item carried over from previous year - YES NO

2. Train in the Treatment Plant to assist with MOR, BAC-T Samples, Lead and Copper and the schedule time to complete that task.

Item carried over from previous year - YES NO

3. Write an SOP for Disconnects, Flushing and Leak Detection

Item carried over from previous year - YES NO

4.

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 7-22-22

Employee's Sign: 

Date: 7-22-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	03/21/2022	Period of Evaluation:	03/05/2021 – 03/05/2022

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.4
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.2
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.2
Section Score: 3.275	

Comments:

■ demonstrates good knowledge to perform ■ job. ■ has gained job knowledge through ■ years of experience. ■ manages several responsibilities simultaneously and has a positive attitude towards work assignments. ■ communicates well to address a variety of customer issues. ■ responds well and has improved ■ reaction to negative comments heard from customers. ■ also communicates well with ■ co-workers.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.3
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.3
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.3
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.5
Section Score: 3.28	

Comments:

████ works well with other employees and is considerate. █████ keeps █████ area well organized and clean. █████ has adapted to changes throughout this year. █████ continues to become more comfortable making judgements and analyzing problems to determine appropriate action for solutions regarding customer needs, etc.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Increase involvement during cut-off procedures. Learn to lead process as a backup.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Learn how to post credit card payments to customer accounts.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Learn how to make adjustments to customer accounts.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.275	=	1.6375
Behavioral Traits	37.5%	50%	x	3.28	=	1.64
Supervisory Factors	25%	N/A	x	N/A	=	-
Work Habits						-
Projects/Objectives/Special Assignments						-
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.28

Comments:

██████████ knowledge and confidence in judgement to problems in response to customers has grown and ██████████ does a good job of answering phones promptly. ██████████ is very conscientious of our customers needs and addresses their concerns while begin aware of our policies.

SIGNATURES:

Supervisor: ██████████ Date: 3/22/2022
3/25/22

Supervisor Name (print) ██████████

CEO ██████████ Date: 3/31/22

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature ██████████ Date: 3/25/22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to communicate payment options and policies to customers**

Item carried over from previous year - YES NO

2. **Work on redundancy for other Customer Service Representatives in case they are out of the office**

Item carried over from previous year - YES NO

3. | |

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature  Date: 3/25/22

Employee's Signature  Date: 3/25/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/30/22	Period of Evaluation:	4/30/21 to 4/30/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. *Immediate improvement* required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are *required*.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.8
Section Score: 3.45	

Comments:

████████ knowledge of the treatment process, monitoring the SCADA and distribution system allows ████████ to exceed the companies' expectations. ████████ does an Excellent Job with Customer Complaints.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	2.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.3
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.2
Section Score: 3.16	

Comments:

█████ has improved from last year's evaluation on showing more initiative however █████ still needs to work on taking more responsibility on monitoring projects on █████ own. For example, water loss, Bac-T scheduling and completing end of line flushing.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to participate in manual work situations	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain mechanical knowledge of the plant and the new monitoring systems	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Continue to participate in GIS, Collector and Hydrant Flushing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue Participating in UMI**

Item carried over from previous year - YES NO

2. **Continue to gain knowledge of the mechanical part of the Treatment Plant to include running generators @ Plant.**

Item carried over from previous year - YES NO

3. **Participate in GIS System, Field Comms, Collector, Flushing 2.0**

Item carried over from previous year - YES NO

4.

Item carried over from previous year - YES NO

Supervisor's Signature

Date: 5-2-22

Employee's Signature

Date: 5/2/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	10/24/22	Period of Evaluation:	10/24/21 to 10/24/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.7
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.9
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.2
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.2
Section Score: 3.50	

Comments:

[REDACTED] has gained knowledge over the past year; I can see much improvement.
[REDACTED] has kept up with all the mowing even though [REDACTED] does not have a helper. We need [REDACTED] to focus on keeping the office cleaner and landscaping cleaner.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.4
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.3
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.3
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.9
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.46	

Comments:

████ often gets pulled from ████ assigned duties, ████ never complains and is always willing to adjust to help where needed. (Even when ████ is not on call)

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Indoor Maintenance Projects as Needed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Keep All Property Fences Clear	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Maintenance on Wells/Well Rehab Project	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.50	=	1.75
Behavioral Traits	37.5%	50%	x	3.46	=	1.73
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.48

Comments:

█ has had a good year, █ has accomplished and completed a major clean up on the properties on Westport.

SIGNATURE

Supervisor: █

Date: 11-3-22

Supervisor Name (print): █ █

Date: 11/2/2022

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: █

Date: 11/3/22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

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PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Indoor Maintenance Projects as Needed**

Item carried over from previous year - YES NO

2. **Keep All Property Fences Clear**

Item carried over from previous year - YES NO

3. **Maintenance on Wells/Well Rehab Project**

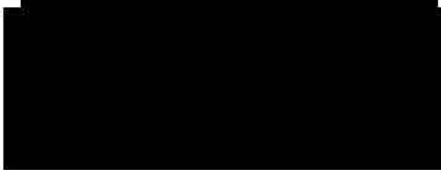
Item carried over from previous year - YES NO

4. **More Detail Office Cleaning and In Landscaping**

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 11-3-22

Employee's Signature: 

Date: 11/3/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/13/22	Period of Evaluation:	7/13/21 to 7/13/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

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- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.1
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.4
Section Score: 3.68	

Comments:

██████████ knowledge of the GIS system is excellent, ██████████ skills and ability to implement new maps, new ideas and help ██████████ fellow employees with their thoughts and or suggestions is second to none.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.7
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.6
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.1
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.7
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.3
Section Score: 3.68	

Comments:

██████████ work area is clean and organized. ██████ keeps very good notes and files/documents on everything.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
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Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review 1. Project/Objective/Special Assignment Write an SOP for Field Comm Collection	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Peruse Class IVB Treatment License	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Provide a Monthly Report for Field Comms and Archived	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Write an SOP for Field Comm Collection to Include Service Interruptions and New Installs**

Item carried over from previous year - YES NO

2. **Peruse Class IVB Treatment License**

Item carried over from previous year - YES NO

3. **Complete UMI certification!**

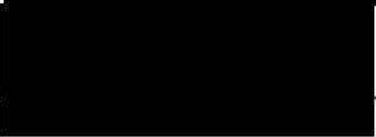
Item carried over from previous year - YES NO

4.

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 7-15-22

Employee's Signature: 

Date: 7/15/2022



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	6/1/2022	Period of Evaluation:	6/1/2021 – 5/31/2022

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

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- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials, and equipment as they relate to performance.	5.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	5.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.7
Section Score: 4.85	

Comments:

- [REDACTED] knows [REDACTED] job very well and anything that is unfamiliar [REDACTED] is more than willing to learn.
- [REDACTED] always completes [REDACTED] assignments without having to be prompted.
- [REDACTED] ability to perform [REDACTED] work timely is unprecedented, and [REDACTED] always has multiple projects to manage simultaneously.
- [REDACTED] follows the rules and never complains about additional tasks ask of [REDACTED]
- [REDACTED] is always polite and is always willing to listen without complaint.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	5.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.6
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	5.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	5.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	5.0
Section Score: 4.92	

Comments:

- [REDACTED] ability to work well with others is exceptional, and [REDACTED] is always a team player
- [REDACTED] looks for ways to improve the OCWD over and above what should be required
- [REDACTED] projects are always neat, and [REDACTED] work areas are kept neat and clean
- [REDACTED] has seen, participated in, implemented, and directed many changes in staff and operation of the District over the last year, [REDACTED] adjusts to change without complaint and is not afraid to make improvements, but does so in a polite and professional manor.
- [REDACTED] always has the Districts best interest at heart, even when it requires more effort on [REDACTED] part. [REDACTED] ability to solve difficult problems make [REDACTED] an asset to this organization.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.8
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.5
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.8
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.8
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	5.0
Section Score: 4.78	

Comments:

- [REDACTED] keeps [REDACTED] people working toward a common goal, and I believe they have the upmost respect for [REDACTED]
- [REDACTED] is exceptional in planning and making sure items are completed on time. [REDACTED] is very valuable to me in this area. [REDACTED] is always planning and if priorities change, [REDACTED] is willing to do whatever is required to make sure all jobs are completed timely.
- [REDACTED] keeps me informed and up to date on the day to day operations in the office. [REDACTED] follows policy and expects [REDACTED] staff to do the same.
- There is no better role model in our company than [REDACTED] [REDACTED] is polite, professional, timely, and provides concise, consistent answers to employees with questions.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Create redundancy in your department by doing additional cross-training	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

Continue cross-training as much as possible.

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.85	=	1.82
Behavioral Traits	37.5%	50%	x	4.92	=	1.85
Supervisory Factors	25%	N/A	x	4.78	=	1.20
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.87

Comments:

My thoughts on [REDACTED] performance are certainly reflected in this review, [REDACTED] continues to impress me with [REDACTED] ability to learn the water business and apply [REDACTED] skills, while very uncommon for someone to continue to rank this high [REDACTED] is undoubtedly the exception. [REDACTED] is a first-class representative for OCWD, and the information [REDACTED] provides is always accurate and timely, [REDACTED] leads by example, and is a very valuable asset to this organization. [REDACTED] is never satisfied with acceptable; [REDACTED] wants to go above and beyond. [REDACTED] continues to be praised by [REDACTED] peers, our Auditors, and Attorneys. Given the challenges put before us in the last year with Covid-19, [REDACTED] has driven us to continue our efforts to make our customers and employees comfortable with technology in-order to provide the level of service expected. Our success with handling bad debt and customer related issues is largely due to [REDACTED] and [REDACTED] is to be commended for this. [REDACTED] has also volunteered countless hours to KRWA and the water industry to develop tools to help water utilities across the state, I want to encourage [REDACTED] to continue this effort and being involved organizations like KRWA and the KY society of CPAs.

SIGNATURES:

CEO: [REDACTED] Date: 6/10/2022

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary)

Employee Signature [REDACTED] Date: 6/3/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	11/10/2022	Period of Evaluation:	11/10/2021-11/10/2022

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.3
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.8
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.5
Section Score: 4.525	

Comments:

████████ exhibits a high level of job knowledge and experience. ████████ manages several responsibilities at the same time and is very conscience of deadlines. ████████ stays on top of others' (signers) schedules to keep the payables on time. ████████ displays a very positive attitude towards ████████ work assignments and operates from OCWD policies. ████████ communicates well with co-workers and customers.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.6
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.6
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.7
Section Score: 4.28	

Comments:

[REDACTED] has a great rapport with [REDACTED] co-workers. [REDACTED] demonstrates consideration when working with others and she's fast to accept new tasks and challenges. [REDACTED] often looks for and suggest improvements and monitors projects independently as well as follows up. [REDACTED] supports changes made and adapts to them, particularly with procedures/processes and software upgrades. [REDACTED] analyzes problems well and keeps OCWD policies at the top of mind.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Assist with changing software/billing services	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to meet payable and payroll deadlines	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Assist with transitioning to new customer portal/payment platform**

Item carried over from previous year - YES NO

2. **Assist with driving customers to enroll in paperless billing**

Item carried over from previous year - YES NO

3. **Continue to analyze software options**

Item carried over from previous year - YES NO

4. **Help designing the new paper bill**

Item carried over from previous year - YES NO

Supervisor's Signature

Date: 11/10/22

Employee's Signature

Date: 11-10-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	9/17/22	Period of Evaluation:	9/17/21 to 9/17/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
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- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.5
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.2
Section Score: 3.85	

Comments:

██████ knows █████ job very well and is always learning in other departments. █████ uses █████ skills and techniques to exceed the company's expectations. █████ has no problem working safely and following all companies' policy and procedures.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.4
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.66	

Comments:

██████ keeps █████ work area neat and organized. █████ truck is also clean and organized.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	3.5
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	3.2
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.0
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.4
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.52	

Comments:

█ sees the big picture and plans accordingly. █ also works with others to complete the assignment.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review		
1. Project/Objective/Special Assignment Participate in training new employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Obtain Water Distribution License or Treatment License	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Project/Objective/Special Assignment Seek Safety Training Videos to Improve our Safety Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Continue with Safety Improvements at the Office and Plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.85	=	1.44
Behavioral Traits	37.5%	50%	x	3.66	=	1.37
Supervisory Factors	25%	N/A	x	3.52	=	.88
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.69

Comments:

██████████ is an asset to OCWD ██████████ knowledge and leadership is a contributor to ██████████ success.

SIGNATURE

Supervisor: ██████████

Date:

9-19-22

Supervisor Name (print):

C

Date:

9-19-2022

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature

Date:

9/19/22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Participate in safely training new employees**

Item carried over from previous year - YES NO

2. **Assist in Ideas and or Wish List as we start in System Improvements**

Item carried over from previous year - YES NO

3. **Obtain Class III Distribution or Class IV Treatment License**

Item carried over from previous year - YES NO

4. **Write or Update SOPs for the Plant/Maintenance Department.**

Item carried over from previous year - YES NO

Supervisor's Signature

Date: 9-19-22

Employee's Signature

Date: 9/14/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/19/22	Period of Evaluation:	4/19/21 to 4/19/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

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- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are *required.*
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.5
Section Score: 3.3	

Comments:

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.7
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.2
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	2.9
Section Score: 3.06	

Comments:

██████ could improve in █████ housekeeping by keeping truck and tools clean and organized. Keep trash picked up and put things back where █████ found them.

██████ has trouble making decisions by █████ due to overthinking and deciding to call for help and have them make the decision for █████

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
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Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

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List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue participating in GIS of infrastructure to include line breaks and new installs.**

Item carried over from previous year - YES NO

2. **Continue to gain more knowledge of the distribution system and treatment plant**

Item carried over from previous year - YES NO

3. **Work towards [REDACTED]**

Item carried over from previous year - YES NO

4. **Work towards getting CDL**

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED]

Date: 4-28-22

Employee's Signature: [REDACTED]

Date: 4-28-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	12/20/22	Period of Evaluation:	12/31/21 to 12/31/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.7
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.2
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.475	

Comments:

Always completing assigned tasks ahead of schedule and taking on additional work from other departments as well. Working Hard on Setting Up New Trucks and was a Big Help in Well Field Project and Other Sites.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.2
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.4
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.4
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.68	

Comments:

Employee is Always Ready to Help People in Other Departments When Needed. Keeps [REDACTED] Work Truck Clean and Organized.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.</p>	
<p>Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?</p>	
<p>Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.</p>	
<p>Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?</p>	
<p>Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?</p>	
<p>Section Score: N/A</p>	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Update Treatment Plant Restroom	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> <i>by</i>
2. Project/Objective/Special Assignment Well Field Generator Project	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Project/Objective/Special Assignment Greenhaven #3 Breaker Repair	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

Unsatisfactory status due to supervisory priority

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Update Treatment Plant Restroom**

Item carried over from previous year - YES NO

2. **Well Field Generator Project**

Item carried over from previous year - YES NO

3. **Special Upgrades @ Treatment Plant**

Item carried over from previous year - YES NO

4.

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 12-28-22

Employee's Signature: 

Date: 12/28/22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	11/03/2022	Period of Evaluation:	10/29/2021 – 10/29/2022

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources. 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
---------------------------	--

MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.8
Section Score: 4.125	

Comments:

██████ is very knowledgeable of █████ job. █████ demonstrates █████ ability to manage several responsibilities simultaneously on a regular basis by covering phone calls while staying engaged with other job functions. █████ displays a very positive and cooperative attitude toward work assignments while following our tariffs/rules.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.8
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.8
Section Score: 4.02	

Comments:

█ works well with others, has a good rapport and is willing to help out the team when needed. █ keeps █ desk very organized and clean and █ paperwork is also very organized and legible.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.</p>	
<p>Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?</p>	
<p>Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.</p>	
<p>Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?</p>	
<p>Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?</p>	
<p>Section Score:</p>	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Cross train on meter reading/billing procedures.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Reconcile monthly work order type via system report to disconnect and reconnects reported to PSC	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.125	=	2.0625
Behavioral Traits	37.5%	50%	x	4.02	=	2.01
Supervisory Factors	25%	N/A	x	N/A	=	N/A
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.07

Comments:

██████████ is very loyal to OCWD and displays a very positive attitude towards ██████████ work with customers at the top of ██████████ mind. ██████████ communicates well and I am very grateful to have ██████████ on our team.

SIGNATURES:

Supervisor: ██████████ Date: 11/3/22
11/1/2022

Supervisor Name (print): ██████████
CF ██████████ Date: 11/2/2022

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: ██████████ Date: 11-3-22

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Assist with transition to new customer payment platform including posting payments to our CIS software**

Item carried over from previous year - YES NO

2. **Continue to cross train with other Customer Service Representatives**

Item carried over from previous year - YES NO

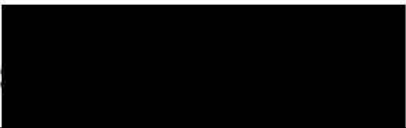
3. **Implement new sales tax laws**

Item carried over from previous year - YES NO

4. | |

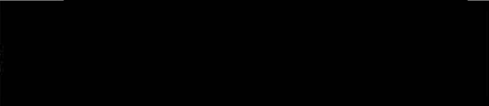
Item carried over from previous year - YES NO

Supervisor's Signature



Date: 11/3/22

Employee's Signature



Date: 11-3-22



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	9/20/22	Period of Evaluation:	9/20/21 to 9/20/22

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

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- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.8
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.5
Section Score: 4.63	

Comments:

█████ knows █████ job very well and is always willing to learn new ways of doing things. █████ has no problem managing several assignments at the same time and sees them to their completion. █████ also has no issues meeting deadlines for upcoming work schedules. █████ works well with all employees. █████ always has a positive attitude and has no problem following work policy and procedures. █████ directions are clear and precise which means █████ team knows exactly what to do and what is next.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.7
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	5.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.0
Section Score: 4.34	

Comments:

██████ is a contributing team member and is always willing to lend a helping hand. ██████ stepped up and took over the meter department and has no problem managing projects on ██████ own. ██████ is always willing to explore new ideas and suggestions to improve the work environment. ██████ is very adaptable when it comes to work duties, ██████ gets pulled off one job and placed on another with little or no complaints. ██████ has no issues in following OCWD policies and procedures. ██████ thinks of the company first in deciding on how to repair the job.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.5
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.2
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.5
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.5
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	4.5
Section Score: 4.44	

Comments:

████████ is a true team leader; ████████ has the respect of ████████ team, and ████████ inspires them to be better. ████████ understands the bigger picture and that planning being organized is key to meeting goals. ████████ understands ████████ team which allows ████████ to delegate and administer the workload to the proper people. ████████ is a role model for others and is an excellent manager.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review 1. Project/Objective/Special Assignment PSC Certified Meter Tester	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Gain more knowledge of the distribution system, Treatment Plant, Inventory.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Participate in the GIS system, by implementing and training in the Collector, Hydrant Flushing, Survey 123 and Line Leak Log	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Become more familiar with our Specs. To be able to fill in as an Inspector if needed	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Complete the UMI Course**

Item carried over from previous year - YES NO

2. **Continue to Gain Knowledge of Distribution System and Treatment Plant.**

Item carried over from previous year - YES NO

3. **Write SOPs for the Meter Department. IE Final & Leave On, Turn On etc.**

Item carried over from previous year - YES NO

4. **Become more Familiar with OCWD Specs, to allow you to fill in as an Inspector.**

Item carried over from previous year - YES NO

Supervisor's Signature

Date:

9-19-22

Employee's Sign

Date:

9-19-22

Exhibit PH-2

2023 Interviews



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/26/23	Period of Evaluation:	7/29/22 – 7/29/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
---------------------------	---

MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
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- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.5
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.2
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 4.25	

Comments:

█████ has a great deal of job knowledge which has shown while we implemented our new Customer portal, merchant services, and outsourced billing. █████ skills and abilities allowed █████ to pivot to these new procedures. █████ meets work schedules while continuing multiple responsibilities. █████ stays positive and follows OCWD policies. █████ listens to customer needs/concerns and communicates well with them both verbal and written.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.3
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.2
Section Score: 4.16	

Comments:

█████ exceeds expectations with █████ cooperation. █████ works well with co-workers and myself and █████ is very considerate of others (customers and co-workers) and willing to help out. █████ often helps others trouble shoot computer/phone issues. █████ will bring things to my attention when issues arise that need improvement. █████ keeps █████ desk and paperwork neat and easy for others to find. █████ adaptability shined this past year as we transitioned our customer portal, merchant services and outsourced billing. █████ adjusted well to these changes in procedures and was open-minded regarding the new services. █████ does a good job analyzing problems and determines the appropriate action for solutions.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Play an integral part of upgrading our customer experience (ie. Outsourcing our billing service including online billing)	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

█████ attitude and willingness to assist during the transition of adding online billing (paperless billing) and outsourced billing helped make this process go smooth.

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Assist with analyzing new software options.**

Item carried over from previous year - YES NO

2. **Implement new software and procedures.**

Item carried over from previous year - YES NO

3. **Update procedure documents (SOPs) once software changes.**

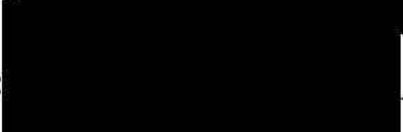
Item carried over from previous year - YES NO

4. **Continue to share online payment options with customers (ie paperless, autopay, reminders, etc)**

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 7/26/23

Employee's Signature: 

Date: 7/26/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last)			
Job Title:			
Supervisor Conducting Review:			
Date:	3/23/23	Period of Evaluation:	3/22/22 to 3/22/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources. 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** – Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.6
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.73	

Comments:

████████ Knowledge, Skills and Abilities allow ██████ to exceed the company's expectations. ██████ operates the equipment with extreme care, services the equipment as needed and still can manage ██████ daily workload. ██████ is very productive and meets all deadlines on or before schedule. ██████ does a great job communicating with staff but needs to communicate better with the team

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.8
Section Score: 3.72	

Comments:

██████ is always willing to lend a helping hand sometimes too much, ██████ needs to train others so they will become more independent and will not relay on ██████ ██████ works well with all employees. ██████ has improved on neatness/organization. I would like to see ██████ work area stay clean and complete ██████ paperwork in a timely manner. ██████ adapts to changing situations easily with little to no complaints, examples is taking on meter department and inspecting new construction infrastructure.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.2
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.0
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	3.0
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.0
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.54	

Comments:

█████ is a natural leader; █████ needs to continue to exercise that ability. █████ management style serves as a role model to others. █████ needs to work one on one with █████ service worker more than █████ has in the past. They need more training. █████ has taking ownership to GIS and listening on meters for leaks █████ pushes █████ team to complete this task.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to Train on GIS Equipment to collect all new services, repairs, locates, to include Paperless Work Order System.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Improve Housekeeping/Organization in the Shop and Truck	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Train other employees in the Field and on New Projects to include Inspector and Specs	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Complete Work Zone Traffic Control Technician Qualification Course	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **| Continue to implement the collection of all new services, repairs, etc. and paperless work order system |**

Item carried over from previous year - YES NO

2. **|| Improve Housekeeping/Organization in the Shop and Truck |**

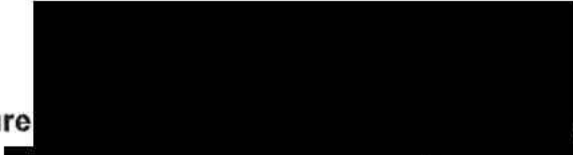
Item carried over from previous year - YES NO

3. **| Train Field employees on New Projects to include Inspector and Specs |**

Item carried over from previous year - YES NO

4. **| Write SOP's for Main Repairs and New Services Installation |**

Item carried over from previous year - YES NO

Supervisor's Signature  3/23/23 |

Employee's Signature  Date: 3/31/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date: 8/2/2023	8/22/23	Period of Evaluation:	8/22/22 – 8/22/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.5
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.9
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 4.525	

Comments:

See page 6

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.8
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.9
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.0
Section Score: 4.54	

Comments:

See page 6

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

See page 6

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.9
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.1
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.8
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.7
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.9
Section Score: 4.48	

Comments:

See page 6

Comments:

██████ is highly proficient in ██████ role and demonstrates a willingness to learn when faced with unfamiliar tasks.

██████ consistently finishes assignments without needing reminders. ██████ projects exhibit a high level of organization, and ██████ work areas and truck are consistently well-maintained.

██████ exceptional time management skills enable ██████ to handle multiple projects simultaneously.

██████ adheres to guidelines and takes on additional tasks without complaint.

██████ consistently maintains a courteous demeanor and is receptive to feedback.

██████ excels in collaborating with colleagues and functions effectively within a team.

██████ actively seeks opportunities to enhance the OCWD's operations beyond the expected standards.

██████ consistently prioritizes the District's best interests, even when it demands extra effort. ██████ problem-solving abilities greatly benefit the organization.

██████ rarely takes sick leave and often goes above and beyond.

██████ adeptly guides ██████ team towards shared objectives, earning their respect. However, ██████ accommodating nature might lead to occasional exploitation by others.

██████ is encouraged to delegate more tasks and demand greater accountability from ██████ team members. While ██████ sometimes completes assignments ██████ to meet deadlines and ensure quality, encouraging ██████ team to take on more responsibilities would be beneficial.

██████ is a strong role model, providing clear and concise direction. However, ██████ could encourage ██████ employees to independently tackle more tasks rather than relying on ██████ assistance.

Overall, ██████ is an asset to the organization due to ██████ dedication and problem-solving skills.

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.5	=	1.69
Behavioral Traits	37.5%	50%	x	4.54	=	1.70
Supervisory Factors	25%	N/A	x	4.48	=	1.12
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.51

Comments:

SIGNATURES:

Supervisor: _____ Date: _____

Supervisor Name (print): [REDACTED]

CEO: [REDACTED] Date: 8/02/2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature [REDACTED] Date: 8-22-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	8/15/23	Period of Evaluation:	8/15/22 to 8/15/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
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- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.6
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.4
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	2.8
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.20	

Comments:

██████ has knowledge and understanding of the day-to-day operations and can perform those tasks without supervision.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.8
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.2
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.9
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.6
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.38	

Comments:

████ works well with other employees and crews, and ███ also has a good attitude. █████ is very adaptable and can adjust without notice to meet the job at hand. █████ always does what is asked of █████

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

See OCWD Personnel Policy # 260

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to gain knowledge of the distribution system, treatment plant, inventory, and policies of OCWD	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Work towards becoming a [REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.20	=	1.60
Behavioral Traits	37.5%	50%	x	3.38	=	1.69
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.29

Comments:

█ has had a good year at OCWD. █ is working aggressively towards becoming a █

SIGNATURES:

Supervisor: █

Date: 8-15-23

Supervisor Name (print): █

CE: █

Date: 8/22/2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: █

Date: 8-15-23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to gain knowledge of the distribution system, treatment plant, inventory, and policies of OCWD**

Item carried over from previous year - YES NO

2. **Work towards becoming a [REDACTED]**

Item carried over from previous year - YES NO

3. **Complete Sacramento classes needed to obtain treatment license.**

Item carried over from previous year - YES NO

4. [REDACTED]

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED] Date: 8-15-23

Employee's Signature: [REDACTED] Date: ~~8-22-23~~
8-15-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/24/23	Period of Evaluation:	7/24/22 to 7/24/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.33	

Comments:

█████ is very knowledgeable in the distribution field, water mains, valves and locates. █████ is gaining a better understanding of the treatment side. █████ skills and abilities exceed the companies' expectations.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.3
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.3
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.3
Section Score: 3.38	

Comments:

████████ has a great sense of judgement. ████ considers the best way to repair the problem, ████ has the future in mind and is always thinking of the customers, attempting to reduce the inconvenience to them. ████████ understands the BWA process and does a good job to ensure the state, health department and OCD are notified.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review 1. Project/Objective/Special Assignment Train with an Inspector to assist on projects. Making sure they follow our Specs and complete the project.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
2. Project/Objective/Special Assignment Train in the Treatment Plant to understand the MOR, Bac-T samples, Lead and Copper and the scheduled time to complete that task.	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Project/Objective/Special Assignment Write an SOP for Disconnects, Flushing and Leak Detection	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Train with an Inspector to assist on projects. Making sure they follow our Specs and complete the project.**

Item carried over from previous year - YES NO

2. **Train in the Treatment Plant to assist with MOR, BAC-T Samples, Lead and Copper and the schedule time to complete that task.**

Item carried over from previous year - YES NO

3. **Write an SOP for Disconnects, Flushing and Leak Detection**

Item carried over from previous year - YES NO

4.

Item carried over from previous year - YES NO

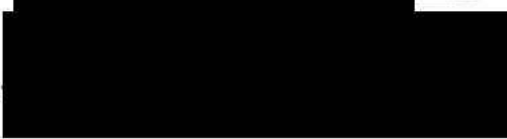
Supervisor's Signature



Date:

7-26-23

Employee's Signature



Date:

7-27-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	3/29/23	Period of Evaluation:	03/05/22-03/05/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.5
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 3.75	

Comments:

█████ quickly answers the phone and addresses customers in the drive thru or office. █████ puts the customers first and responds quickly while juggling multiple items at the same time such as posting payments from the mail and providing work order information to co-workers. █████ communicates well and considerately to customers and co-workers.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.8
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.5
Section Score: 3.66	

Comments:

█████ contributes to our team and is considerate and willing to help others, including both to customers and co-workers. █████ treats our customers with compassion. █████ keeps the front desk area and drive thru neat and without clutter. As others need █████ space when █████ is not here, it's easy for them to access and find items.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to communicate payment options and policies to customers	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Work on redundancy for other Customer Service Representatives in case they are out of the office	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. | **Guide Customers through the new customer portal registration process, ways to pay etc.** |

Item carried over from previous year - YES NO

2. | **Alter procedures for processing/posting payments with our new platform, InvoiceCloud – continue to become familiar** |

Item carried over from previous year - YES NO

3. | **Assist with transitioning software for Utility Management/Customer Information System** |

Item carried over from previous year - YES NO

4. | **Continue to back up other Customer Service Reps when out of the office** |

Item carried over from previous year - YES NO

Supervisor's Signature:



Date:

3/31/23

Employee's Signature:



Date:

3/31/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	5/23/2023	Period of Evaluation:	5/23/2022 to 5/23/2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.5
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.8
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.4
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.6
Section Score: 3.58	

Comments:

██████ had a very good year at OCWD, █████ is a quick learner, is talented and uses █████ all █████ resources to the best of █████ abilities. █████ is a team player. █████ passed the █████ and was on-call in just a few months. █████ has performed that duty very well. █████ has no issues with managing several jobs at one time, █████ completes those tasks and has no problem meeting deadlines. █████ takes ownership to every situation that is presented to █████ █████ has a positive attitude, works safely, and follows all OCWD policies and procedures. █████ communicates well with █████ co-workers and staff; █████ has had a lot of good ideas and will express those clearly.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.7
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.6
Section Score: 3.66	

Comments:

██████ is a true team member, ██████ has no issues admitting ██████ needs help, and ██████ co-workers can count on ██████ to help whenever possible. ██████ came to OCWD last year and has been full of initiative since ██████ seeks to improve ██████ and the company daily, ██████ takes ownership and monitors projects independently. ██████ work area is always clean and organized, ██████ paperwork is accurate and detailed. ██████ thinks logically and has the company's best interest at heart, ██████ analyzes problems timely and accurately. ██████ thinks long term and wants to repair it correctly the first time.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.58	=	1.79
Behavioral Traits	37.5%	50%	x	3.66	=	1.83
Supervisory Factors	25%	N/A	x	N/A	=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.62

Comments:

SIGNATURE

Supervisor: _____

Date: 6-7-23

Supervisor Name (print): _____

CEO _____

Date: 6-7-2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature _____

Date: 6-7-23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. Continue to participate in GIS of Infrastructure to include line breaks, line locates, new installs, ETC.

Item carried over from previous year - YES NO

2. Continue to gain more knowledge of the distribution system, meter department and treatment plant.

Item carried over from previous year - YES NO

3. Take [REDACTED]

Item carried over from previous year - YES NO

4. Certified Meter Tester and GIS Classes

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED]

Date: 6-7-23

Employee's Signature: [REDACTED]

Date: 6-7-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/30/23	Period of Evaluation:	4/30/22 to 4/30/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	2.8
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.8
Section Score: 3.40	

Comments:

[REDACTED] knowledge of the treatment process, monitoring the SCADA and distribution system allows [REDACTED] to exceed the companies’ expectations. [REDACTED] does an Excellent Job with Customer Complaints. [REDACTED] did not get [REDACTED] portion of the end of line hydrants flushed. [REDACTED] does a good job of communicating about upcoming events and or appointments.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.3
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	2.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.8
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 2.92	

Comments:

██████ needs to show more initiative and take more responsibility for monitoring projects on ██████ own. For example, water loss, Bac-T scheduling (not on disconnect day) and completing ██████ portion of the end of line flushing. ██████ keeps ██████ truck clean and organized but could keep the treatment plant cleaner; ██████ relies on ██████ and ██████ to help or do it for ██████

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.</p>	
<p>Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?</p>	
<p>Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.</p>	
<p>Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?</p>	
<p>Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?</p>	
<p>Section Score: N/A</p>	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to participate in UMI	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain mechanical knowledge of the treatment plant, the new monitoring systems, to include running generators @ Plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Continue to participate in GIS, Field Comm Collector and Hydrant Flushing 2.0.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.40	=	1.70
Behavioral Traits	37.5%	50%	x	2.92	=	1.46
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.16

Comments:

█ is a knowledgeable plant operator. █ does an excellent job with customer complaints and monitoring the SCADA System.

SIGNATURE

Supervisor: █

Date 5-3-23

Supervisor Name (print): █

C █

Date: 5/3/2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signatu █

Date: 5/3/23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to Participate in GIS System, Field Comms and Flushing 2.0**

Item carried over from previous year - YES NO

2. **Continue to gain knowledge of the mechanical part of the Treatment Plant to include running generators @ Plant.**

Item carried over from previous year - YES NO

3. **Continue to work closely with outside contractors monitoring sampling equipment to improve water quality and record keeping.**

Item carried over from previous year - YES NO

4. []

Item carried over from previous year - YES NO

Supervisor's Signature

Date: 5-3-23

Employee's Signature

Date: 5/3/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	10/24/23	Period of Evaluation:	10/24/22 to 10/24/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.3
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.2
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.1
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.15	

Comments:

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.6
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.2
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.4
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 3.24	

Comments:

████ helps ████ co-workers on breaks and covers for them when they need coverage on weekends. ████ needs to do a better job in keeping the office clean, garbage out, weeds in landscaping etc. ████ gets pulled off of ████ daily task often ████ adjust to the changes well.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Indoor Maintenance Projects as Needed	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Keep All Property Fences Clear	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Maintenance on Wells/Well Rehab Project	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.15	=	1.58
Behavioral Traits	37.5%	50%	x	3.24	=	1.62
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.20

Comments:

█ has had a good year, █ has accomplished and completed a major clean up on the properties on Westport.

SIGNATURE █
Supervisor █

Date: 11-1-23

Supervisor Name (print): █

CE █

Date: 11/1/23

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature █

Date: 11/1/23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Indoor Maintenance Projects as Needed**

Item carried over from previous year - YES NO

2. **Keep All Property Fences Clear**

Item carried over from previous year - YES NO

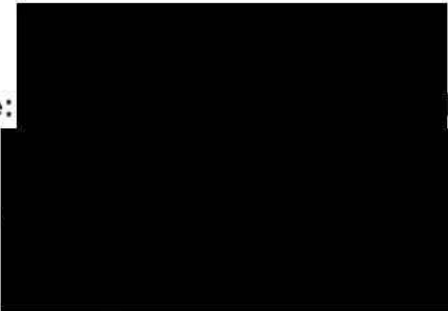
3. **Maintenance on Wells/Well Rehab Project**

Item carried over from previous year - YES NO

4. **More Detail Office Cleaning and In Landscaping**

Item carried over from previous year - YES NO

Supervisor's Signature:



Date:

11-1-23

Employee's Signature:

Date:

11/1/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/29/2023	Period of Evaluation:	4/29/2022 to 4/29/2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
---------------------------	---

MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.5
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.43	

Comments:

████████ mechanical abilities are a great asset to OCWD and require no assistance. █████ skills and abilities are very good and is productive to meet work deadlines. There is no need to go back and check to see if █████ done it correctly. █████ keeps a positive attitude and works well with others. █████ follows work rules and works safely. █████ operates the equipment safely and with care.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.2
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.6
Section Score: 3.92	

Comments:

██████ is a model employee when it comes to cooperation. █████ works well with all employees, █████ is always willing to help or assist others. █████ monitors █████ projects independently and rarely needs help. █████ keeps █████ truck, equipment, and work area clean and organized. █████ keeps up with the maintenance of all equipment without any prompting to complete that task. █████ has no issues in having to adapt to changing workload. █████ analyzes problems correctly and effectively and has come a long way in 1 year.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	3.4
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	3.2
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	3.2
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.5
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.36	

Comments:

[REDACTED] is a good crew leader; [REDACTED] brings out the best in those [REDACTED] works with. [REDACTED] has no problem delegating work to [REDACTED] service workers and planning their day is no issue. [REDACTED] is very good with time management; [REDACTED] keeps [REDACTED] busy until it is time to go home. [REDACTED] seems to communicate well with [REDACTED] service workers and they like working with [REDACTED]

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.43	=	1.29
Behavioral Traits	37.5%	50%	x	3.92	=	1.47
Supervisory Factors	25%	N/A	x	3.36	=	.84
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 – 4.4 EXCEEDS EXPECTATIONS	2.5 – 3.4 MEETS EXPECTATIONS	1.5 – 2.4 NEEDS IMPROVEMENT	1.0 – 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.60

Comments:

██████ is a quick learner and has had a good year at OCWD, ██████ is an asset to the company, and we are lucky to have ██████

SIGNATURE

Supervisor: _____

Date: 5-4-23
4/28/2023

Supervisor Name (print): _____

Date: 5/4/2023

Comments: []

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signa _____

Date: 5-4-2023

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to participate in GIS of infrastructure to include line breaks and new services.**

Item carried over from previous year - YES NO

2. **Finish Getting Ride Along**

Item carried over from previous year - YES NO

3. **Obtain Distribution License**

Item carried over from previous year - YES NO

4. **Certified Meter Tester and UMI Classes**

Item carried over from previous year - YES NO

Supervisor's Signature



Date: 5-4-23

Employee's Signatu



Date: 5-4-2023



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	7/13/23	Period of Evaluation:	7/13/22 to 7/13/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.6
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.5
Section Score: 3.70	

Comments:

██████████ knowledge of the GIS system is excellent, ██████████ skills and ability exceed the company's expectations, ██████████ can handle multiple projects at one time and has no problem meeting deadlines. ██████████ has a great attitude, has no issues following rules. ██████████ works safely and works well with others.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.8
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.6
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.1
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.7
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.72	

Comments:

████████ is always willing to give a helping hand. ██ is busy working on multiple projects but manages them all very effectively. ████████ work area is clean and organized. ██ keeps very good notes and keeps documents on everything. ████████ has no problem adapting to changes in the work environment, ██ is always getting pulled in different directions but never complains about the adjustments.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review 1. Project/Objective/Special Assignment Write an SOP for Field Comm Collection to include service interruptions and new installs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Peruse Class IVB Treatment License	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.70	=	1.85
Behavioral Traits	37.5%	50%	x	3.72	=	1.86
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.71

Comments:

██████████ is a valuable part of the success here at OCWD. ██████████ knowledge in the GIS field is excellent.

SIGNATURE ██████████

Supervisor: ██████████

Date: 7-19-23

Supervisor Name (print): ██████████

o

Date: 7/19/23

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Thank you for all that you all do to make this a great place to work!

Employee Signature ██████████

Date: 7/19/2023

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Write an SOP for Field Comm Collection to Include Service Interruptions and New Installs**

Item carried over from previous year - YES NO

2. **Peruse Class IVB Treatment License**

Item carried over from previous year - YES NO

3. []

Item carried over from previous year - YES NO

4. []

Item carried over from previous year - YES NO

Supervisor's Signature:

Date: 7-19-23

Employee's Signature:

Date: 7/19/2023



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date: 5/5/2023		Period of Evaluation:	6/1/2022 – 5/31/2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials, and equipment as they relate to performance.	5.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	5.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.7
Section Score: 4.85	

Comments:

- [REDACTED] knows [REDACTED] job very well and anything that is unfamiliar [REDACTED] is more than willing to learn.
- [REDACTED] always completes [REDACTED] assignments without having to be prompted.
- [REDACTED] ability to perform [REDACTED] work timely is unprecedented, and [REDACTED] always has multiple projects to manage simultaneously.
- [REDACTED] follows the rules and never complains about additional tasks ask of [REDACTED]
- [REDACTED] is always polite and is always willing to listen without complaint.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	5.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.6
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	5.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	5.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	5.0
Section Score: 4.92	

Comments:

- [REDACTED] ability to work well with others is exceptional, and [REDACTED] is always a team player
- [REDACTED] looks for ways to improve the OCWD over and above what should be required
- [REDACTED] projects are always neat, and [REDACTED] work areas are kept neat and clean
- [REDACTED] has seen, participated in, implemented, and directed many changes in staff and operation of the District over the last year, [REDACTED] adjusts to change without complaint and is not afraid to make improvements, but does so in a polite and professional manor.
- [REDACTED] always has the Districts best interest at heart, even when it requires more effort on [REDACTED] part. [REDACTED] ability to solve difficult problems make [REDACTED] an asset to this organization.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.8
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.5
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.8
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.8
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	5.0
Section Score: 4.78	

Comments:

- [REDACTED] keeps [REDACTED] people working toward a common goal, and I believe they have the upmost respect for [REDACTED]
- [REDACTED] is exceptional in planning and making sure items are completed on time. [REDACTED] is very valuable to me in this area. [REDACTED] is always planning and if priorities change, [REDACTED] is willing to do whatever is required to make sure all jobs are completed timely.
- [REDACTED] keeps me informed and up to date on the day to day operations in the office. [REDACTED] follows policy and expects [REDACTED] staff to do the same.
- There is no better role model in our company than [REDACTED] [REDACTED] is polite, professional, timely, and provides concise, consistent answers to employees with questions.

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.85	=	1.82
Behavioral Traits	37.5%	50%	x	4.92	=	1.85
Supervisory Factors	25%	N/A	x	4.78	=	1.20
Work Habits						
Projects/Objectives/Special Assignments						5.0
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.87

Comments:

My thoughts on [redacted] performance are certainly reflected in this review, [redacted] continues to impress me with [redacted] ability to learn the water business and apply [redacted] skills, while very uncommon for someone to continue to rank this high [redacted] is undoubtedly the exception. [redacted] is a first-class representative for OCWD, and the information [redacted] provides is always accurate and timely, [redacted] leads by example, and is a very valuable asset to this organization. [redacted] is never satisfied with acceptable; [redacted] wants to go above and beyond. [redacted] continues to be praised by [redacted] peers, our Auditors, and Attorneys.

[redacted] spearheaded the formation of the Oldham Water Benevolent Fund creating a form of assistance to employees in need.

[redacted] has undertaken the leadership role with the implementation of the Invoice Cloud customer portal and has exceeded my expectations. [redacted] has started compiling information for the upcoming rate increase and [redacted] attention to detail is to be commended.

SIGNATURES:

CEO: [redacted] Date: 5/5/2023

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary)

Employee Signature: [redacted] Date: 5/12/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	11/09/23	Period of Evaluation:	11/10/22 – 11/10/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. *Immediate improvement required to maintain employment.*
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	4.5
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.7
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.7
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.5
Section Score: 4.6	

Comments:

█████ exhibits a great level of job knowledge. █████ can cover for customer service/billing. █████ thoroughly considers information and results rather than following a process. █████ often manages several responsibilities simultaneously and manages them timely meeting deadlines, particularly payroll, payables, moving accounts, and monthly work order statistics. █████ displays a positive, cooperative attitude toward work assignments/requirements and is very conscience of following our tariff/policies. █████ communicates very effectively with vendors/customers. █████ is very courteous yet persistent dealing with others including co-workers, vendors and customers.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	5.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.6
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.6
Section Score: 4.34	

Comments:

██████ is the ideal employee in regard to cooperation. ██████ is a huge contribution to our team, is very considerate of others and maintains a good rapport with others. ██████ has pride for OCWD that is hard to match and always willing to help out. ██████ is always willing to help provide information to aid in a good decision. ██████ often looks for and suggests improvements, particularly regarding customer accounts. ██████ does not hesitate to assume greater responsibility. ██████ does a great job paying attention to detail and will then follow up appropriately when items should be changed. ██████ office doesn't always appear the neatest but ██████ can provide anything when asked and keeps things filed as needed. ██████ has adapted to several changes this year such as the change in residential sales tax and our new customer/payment portal. ██████ does a great job anticipating questions that ██████ consider when analyzing any problem in order to present the issue so a solution can be made quickly.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Assist with transitioning to new customer portal/payment platform.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Assist with driving customers to enroll in paperless billing	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Continue to analyze software options	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Help designing the new paper bill	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.6	=	2.3
Behavioral Traits	37.5%	50%	x	4.34	=	2.17
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.5

Comments:

It is an honor to have [REDACTED] as part of our team. [REDACTED] cooperation is unmatched, and [REDACTED] positive attitude and work ethic make [REDACTED] essential to the District.

SIGNATURES:

Supervisor: [REDACTED] Date: 11/9/2023

Supervisor Name (print): [REDACTED]
 [REDACTED] Date: 11/9/23

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Sig: [REDACTED] Date: 11-9-2023

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. [Assist with transitioning to new software]

Item carried over from previous year - YES NO

2. []

Item carried over from previous year - YES NO

3. []

Item carried over from previous year - YES NO

4. []

Item carried over from previous year - YES NO

Supervisor's Signature: [Redacted] Date: 11-9-23

Employee's Signature: [Redacted] Date: 11-9-2023



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	9/26/2023	Period of Evaluation:	9/26/2022 to 9/26/2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	2.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.8
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	2.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 2.96	

Comments:

██████ is neat and very organized, █████ work orders are legible, precise, and full of details. █████ truck is clean, stocked and organized. █████ puts the tools back clean and where █████ found them.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to gain knowledge in distribution field, treatment, and meter department.**

Item carried over from previous year - YES NO

2. **Work towards becoming a [REDACTED]**

Item carried over from previous year - YES NO

3. | |

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED]

Date: 9-29-23

Employee's Signature: [REDACTED]

Date: 9-29-23

Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	9/17/23	Period of Evaluation:	9/17/22 to 9/17/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.2
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.4
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.65	

Comments:

█████ knows █████ job very well and is always learning in other departments. █████ uses █████ skills and techniques to exceed the company's expectations. █████ has no problem working safely and following all companies' policies and procedures.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.3
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.1
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.2
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.5
Section Score: 3.52	

Comments:

██████ keeps █████ work area neat and organized. █████ truck is also clean and organized.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	3.2
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	3.5
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.0
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.4
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.52	

Comments:

█ sees the big picture and plans accordingly. █ also works with others to complete the assignment.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review		
1. Project/Objective/Special Assignment Participate in training new employees	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Obtain Water Distribution License or Treatment License	<input type="checkbox"/>	<input checked="" type="checkbox"/>
3. Project/Objective/Special Assignment Seek Safety Training Videos to Improve our Safety Program	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Continue with Safety Improvements at the Office and Plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.65	=	1.37
Behavioral Traits	37.5%	50%	x	3.52	=	1.32
Supervisory Factors	25%	N/A	x	3.52	=	.88
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.57

Comments:

██████████ is an asset to OCWD ██████████ knowledge and leadership is a contributor to ██████████ success.

SIGNATURES

Supervisor: ██████████

Date: 9-25-23

Supervisor Name (print): ██████████

C ██████████

Date: 9/29/2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature ██████████

Date: 9/29/23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Participate in safety training new employees.**

Item carried over from previous year - YES NO

2. **Assist in Ideas and or Wish List as we start in System Improvements**

Item carried over from previous year - YES NO

3. **Obtain Class III Distribution or Class IV Treatment License**

Item carried over from previous year - YES NO

4. **Write or Update SOPs for the Plant/Maintenance Department.**

Item carried over from previous year - YES NO

Supervisor's Signature: _____

Date: 9-29-23

Employee's Signature: _____

Date: 9/29/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/19/23	Period of Evaluation:	4/19/22 to 4/19/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

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DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.

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- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
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- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.3
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.7
Section Score: 3.38	

Comments:

██████ skills and abilities are good, █████ knowledge is improving and performs well daily. █████ has a positive attitude (most of the time). █████ attitude changes depending on who tells █████ what to do and if █████ is working by █████ or not. █████ communicates well, listens and responds appropriately.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.7
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 3.04	

Comments:

██████ works well with others and is always willing to lend a helping hand. █████ does not seek greater responsibility and has a hard time doing projects independently. █████ could improve in █████ housekeeping by keeping trucks and tools clean and organized. Keep trash picked up and put things back where █████ found them. █████ adapts well to changes when things don't go as planned. █████ has improved in analyzing problems and does not second guess █████ as much as █████ did in the past. █████ could improve more by understanding OCWD policies and procedures.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.</p>	
<p>Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?</p>	
<p>Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.</p>	
<p>Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?</p>	
<p>Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?</p>	
<p>Section Score: N/A</p>	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue participating in GIS of Infrastructure to include line breaks and new installs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain more knowledge of distribution system and treatment plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Work towards [REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Work towards getting CDL	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:



APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue participating in GIS of infrastructure to include line breaks and new installs.**

Item carried over from previous year - YES NO

2. **Continue to gain more knowledge of the distribution system and treatment plant.**

Item carried over from previous year - YES NO

3. **Take [REDACTED] test.**

Item carried over from previous year - YES NO

4. **Work towards [REDACTED]**

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED] : 5-3-23

Employee's Signature: [REDACTED] : 5-2-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	5/4/2024 2023	Period of Evaluation:	2022 - 2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** – Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.0
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety, and organizational policies.	3.9
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score:	3.23

Comments:

██████ skills, knowledge, and ability along with █████ quantity of work, compliance and communication are on task with █████ relatively short time working for the District.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.3
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.3
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score:	3.52

Comments:

█ behavioral traits are where █ shines. █ contributes where possible and never complains, █ is always considerate of others.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x		=	3.23
Behavioral Traits	37.5%	50%	x		=	3.52
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
3.38	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Comments:

I am encouraged with [redacted] going to college and getting [redacted] communications degree and look forward to any new ideas [redacted] can bring to OCWD.

SIGNATURES:

[redacted signature]

Date: 5/5/2023

Comments: []

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature [redacted]

Date: 5/5/23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. | Develop new ideas on how to integrate social media into the day-to-day operations of the District. |

Item carried over from previous year - YES NO

2. | Feature OCWD employees and projects with social media |

Item carried over from previous year - YES NO

3. | |

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature

[Redacted Signature]

Date: 5/5/2023

Employee's Signature

[Redacted Signature]

Date: 5/5/23

Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date: 10-26-23			Period of Evaluation: 11/06/2022 – 11/06/2023

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
 - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 4 = SUPERIOR - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	5
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	5
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	5
Section Score:	20

Comments:

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
<p>Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?</p>	5
<p>Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.</p>	5
<p>Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.</p>	5
<p>Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?</p>	5
<p>Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.</p>	5
<p>Section Score:</p>	
<p>Comments:</p>	

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	5
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	5
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	5
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	5
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	5
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment <i>All of Above</i>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x		=	
Behavioral Traits	37.5%	50%	x		=	
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Comments:

SIGNATURES:

Supervisor: _____

Date: 10/16/2023

Supervisor Name (_____)

CEO: _____ Date: _____

Comments: ||

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

_____ does an outstanding Job!
Good leadership skills. _____ is always prepared and has grown into a great _____ for the District.

Employee Signa _____

Date: 10/26/23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	12/20/23	Period of Evaluation:	12/31/22 to 12/31/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.9
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.8
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.4
Section Score: 3.65	

Comments:

Always completing assigned tasks ahead of schedule and taking on additional work from other departments as well. [REDACTED] is good at setting goals and seeing them completed.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.9
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.2
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.4
Section Score: 3.70	

Comments:

Employee is Always Ready to Help People in Other Departments When Needed. [REDACTED] has Displayed Initiative and Cooperation on Many Tasks Throughout the Year. Keeps [REDACTED] Work Truck, Tools and Plant Clean and Organized.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Update Treatment Plant Restroom	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Well Field Generator Project	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Special Upgrades at Treatment Plant	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.68	=	1.84
Behavioral Traits	37.5%	50%	x	3.70	=	1.85
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 – 4.4 EXCEEDS EXPECTATIONS	2.5 – 3.4 MEETS EXPECTATIONS	1.5 – 2.4 NEEDS IMPROVEMENT	1.0 – 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.69

Comments:

██████████ is valuable asset to OCWD

SIGNATURE

Supervisor: ██████████

Date: 1-5-24

Supervisor Name (print): ██████████

C

Date: 1-5-24

Comments: []

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature

Date:

1/5/24

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Update Treatment Plant Landscaping**

Item carried over from previous year - YES NO

2. **Well Field Upgrade Project**

Item carried over from previous year - YES NO

3. **Special Upgrades @ Treatment Plant**

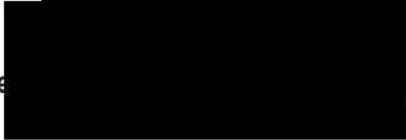
Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 1-5-24

Employee's Signature: 

Date: 1/5/24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	11/1/23	Period of Evaluation:	10/29/22-10/29/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

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DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.2
Section Score: 4.18	

Comments:

■ exhibits above expectations on ■ level of job knowledge due to ■ years of experience. ■ meets work schedules and stays aware of ■ follow up to complete work timely. ■ stays on task even when there are multiple distractions. ■ displays a positive, cooperative attitude. ■ shows compassion for our customers while following the District's rules/policies. ■ does a really good job communicating with customers and with myself and co-workers on issues, scheduling, etc.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.6
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.7
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.3
Section Score: 4.18	

Comments:

██████ is a great contributor to the team as ██████ is considerate of others and often offers to help others willingly. ██████ is reliable if an emergency comes up and needs to adjust ██████ schedule. ██████ speaks up with suggestions for improvements. ██████ keeps ██████ desk and area very neat and organized. ██████ has adapted to several changes over the past year such as a new customer portal/payment receipts and new sales tax law for residents of KY. ██████ analyzes problems very effectively and determines appropriate action for solutions to customer issues.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

██████████ attendance, punctuality and appearance are very appreciated and noticed as exemplary.

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Assist with transition to new customer payment platform including posting payments to our CIS Software.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to cross train with other Customer Service Representatives	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Implement new sales tax law	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.18	=	2.09
Behavioral Traits	37.5%	50%	x	4.18	=	2.09
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.2

Comments:

██████████ is a pleasure to have on our customer service team. ██████████ is very considerate of others. ██████████ handles customer issues appropriately and goes the extra mile for them while following our Tariffs. ██████████ is very reliable and has a positive attitude.

SIGNATURES:

Supervisor: ██████████ Date: 11/1/23
~~10/20/2023~~

Supervisor Name (print): ██████████

CEO: ██████████ Date: 11/1/23

Comments: []

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: ██████████ Date: 11-1-23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Transition to new CIS Software – assist with new set up of customer account information and payment posting processes.**

Item carried over from previous year - YES NO

2. **Transition to new CIS Software - Lead our new mobile work orders procedures**

Item carried over from previous year - YES NO

3. **Complete the Utility Management Institute program conducted by Kentucky Rural Water Association**

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: [Redacted]

Date: 11-1-23

Employee's Signature: [Redacted]

Date: 11-1-23



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	9/20/23	Period of Evaluation:	9/20/22 to 9/20/23

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** - Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** - Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** - Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** - Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.2
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 4.18	

Comments:

■ knows ■ job very well and is always willing to learn new ways of doing things. ■ has no problem managing several assignments at the same time and sees them to their completion. ■ also has no issues meeting deadlines for upcoming work schedules. ■ works well with all employees, even some of the negative ones, and ■ maintains a positive attitude throughout. ■ has no problem following work policy and procedures. ■ directions are clear and precise, which means ■ team knows exactly what to do and what is next.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.3
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	4.3
Section Score: 4.12	

Comments:

██████ is a contributing team member (another strong trait) and is always willing to lend a helping hand. ██████ stepped up and took over the meter department and has no problem managing projects on ██████ own. ██████ is always willing to explore new ideas and suggestions to improve the work environment. ██████ is very adaptable (one of ██████ strongest traits) when it comes to work duties, ██████ gets pulled off one job and placed on another with little or no complaints. ██████ has no issues in following OCWD policies and procedures. ██████ thinks of the company first in deciding on how to repair the job.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.0
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.0
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	4.0
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	4.2
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	4.5
Section Score: 4.14	

Comments:

██████ is an exceptional employee; ██████ has the respect of ██████ team, and ██████ inspires them to be better. ██████ understands the bigger picture and that planning and being organized is key to meeting goals. ██████ understands ██████ team, which allows ██████ to delegate and administer the workload to the proper people. ██████ is a role model for others and is an excellent manager.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review		
1. Project/Objective/Special Assignment Complete the UMI Courses	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Gain more knowledge of the distribution system, Treatment Plant, Inventory.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Write SOP's for the Meter Department IE Final & Leave On's, Disconnect Day, Turn On & Turn Offs ETC.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Become more familiar with our Specs. To be able to fill in as an [REDACTED] if needed.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE

	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	4.18	=	1.56
Behavioral Traits	37.5%	50%	x	4.12	=	1.55
Supervisory Factors	25%	N/A	x	4.14	=	1.04
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4.15

Comments:

██████████ is a very valuable part to the success we have here at OCWD

SIGNATURE: ██████████
 Supervisor: ██████████

Date: 9-29-23

Supervisor Name (print): ██████████

██████████

Date: 9/29/2023

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: ██████████

Date: 9-29-23

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Ensure Your Team Completes Meter Change outs and Annual Reads.**

Item carried over from previous year - YES NO

2. **Continue to Gain Knowledge of Distribution System and Treatment Plant.**

Item carried over from previous year - YES NO

3. **Write SOPs for the Meter Department. IE Final & Leave On, Turn On etc.**

Item carried over from previous year - YES NO

4. **Become more Familiar with OCWD Specs, to allow you to fill in as an**

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 9-29-23

Employee's Signature: 

Date: 9-29-23

Exhibit PH-2

2024 Interviews

Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last)			
Job Title:			
Supervisor Conducting Review:			
Date:	3/23/24	Period of Evaluation:	3/22/23 to 3/22/24

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources. 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
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- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
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- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.4
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.60	

Comments:

████████ Knowledge, Skills and Abilities allow ██████ to exceed the company's expectations.

█████ operates the equipment with extreme care, ██████ ensures the equipment is serviced as needed and still can manage ██████ daily workload.

█████ is very productive, and most deadlines are on or before schedule.

█████ does a great job communicating with staff but needs to communicate better with the team they feel left out and don't always know what the next day holds.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.5
Section Score: 3.60	

Comments:

██████ is always willing to lend a helping hand, but ██████ needs to train others so they will become more independent and will not rely on ██████

██████ works well with all employees.

██████ improved the appearance of the break room and bathroom. I would like to see ██████ work area stay clean, complete ██████ paperwork and timesheet in a timely manner.

██████ adapts to changing situations easily with little to no complaints, examples is taking on the meter department and inspecting new construction infrastructure.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	4.2
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	4.0
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	3.0
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.0
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.54	

Comments:

█ is a natural leader.

█ management style serves as a role model for others.

█ needs to work one on one with █ █ more than █ has in the past. They need more training, continue to move workers around so they experience different jobs and different operators.

█ has taken ownership of GIS and listening on meters for leaks █ pushes █ team to complete this task.

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review		
1. Project/Objective/Special Assignment Continue to Train on GIS Equipment to collect all new services, repairs, locates, to include Paperless Work Order System.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Improve Housekeeping/Organization in the Shop and Truck	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Train other employees in the Field and on New Projects to include Inspector and Specs	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Project/Objective/Special Assignment Write SOPs for Main Breaks and New Service Installations	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to implement the collection of all new services, repairs, etc. and paperless work order system**

Item carried over from previous year - YES NO

2. **Improve Housekeeping/Organization in the Shop and Truck**

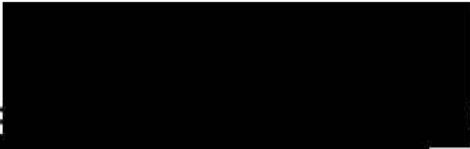
Item carried over from previous year - YES NO

3. **Train Field employees on New Projects to include Inspector and Specs**

Item carried over from previous year - YES NO

4. **Write SOPs for Main Repairs and New Services Installation**

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 3-28-24
3/23/24

Employee's Signature: 

Date: 3-28-24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	3/15/24	Period of Evaluation:	03/05/23-03/05/24

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.9 or lower and 4.0 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (3.0 – 3.9) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.6
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	4.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	4.0
Section Score: 3.78	

Comments:

██████ is quick to answer the phone and address customers in the drive-thru or office. ██████ is direct yet considerate and follows OCWD policies when responding to customers. ██████ accurately posts payments from the mail while continuing to serve customers as needed. ██████ communicates well and considerately to customers and co-workers.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.7
Section Score: 3.64	

Comments:

██████ has utilized our new customer portal to process payments via the phone this year. ██████ has adapted to this new system of payment and customer communication. ██████ also transitioned to a new full page bill sent to our customers (previously a post card). ██████ contributes to our team and is considerate and willing to help others, including both to customers and co-workers. ██████ has gained comfort of covering the ██████ solo during times that co-workers are not available. ██████ treats our customers with compassion. ██████ keeps the front desk area and drive thru neat and without clutter. As others need ██████ space when ██████ is not here, it's easy for them to access and find items.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Guide Customers through the new customer portal registration process, ways to pay etc.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Alter procedures for processing/posting payments with our new platform, InvoiceCloud – continue to become familiar	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Assist with transitioning software for Utility Management/Customer Information System	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4. Project/Objective/Special Assignment Continue to back up other Customer Service Reps when out of the office	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

#3 above, OCWD has yet to select a new software vendor so no transition has occurred yet. This will remain as a goal this coming year.

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Assist with transitioning software for Utility Management/Customer Information System**

Item carried over from previous year - YES NO

2. **Share customer feedback to help improve communication with our customers**

Item carried over from previous year - YES NO

3. | |

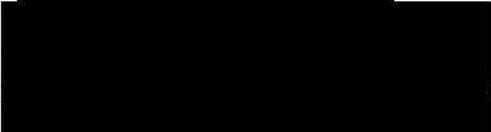
Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 3/15/24

Employee's Signature: 

Date: 3/15/24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :	[REDACTED]		
Job Title:	[REDACTED]		
Supervisor Conducting Review:	[REDACTED]		
Date:	5/23/2024	Period of Evaluation:	5/23/2023 to 5/23/2024

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.3
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.8
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.6
Section Score: 3.50	

Comments:

██████ had a very good year at OCWD, █████ is talented and uses all █████ resources to the best of █████ abilities. █████ is a team player. █████ passed the █████ test. █████ has no issues with managing several jobs at one time, █████ completes those tasks and has no problem meeting deadlines. █████ takes ownership of every situation that is presented to █████ and follows through. █████ has a positive attitude, works safely, and follows all OCWD policies and procedures. █████ communicates well with █████ co-workers and staff.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.3
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	4.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.6
Section Score: 3.58	

Comments:

██████ is a true team member, ██████ has no issues admitting ██████ needs help, and ██████ co-workers can count on ██████ to help whenever possible. ██████ is full of initiative, and ██████ seeks to improve ██████ and the company daily, ██████ takes ownership and monitors projects independently. ██████ work area is always clean and organized, ██████ paperwork is accurate and detailed. ██████ thinks logically and has the company's best interest at heart, ██████ analyzes problems timely and accurately.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to participate in GIS of infrastructure of include line breaks, line locates, new installs, ETC.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain more knowledge of the distribution system, meter department and treatment plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Take [REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Certified meter tester and GIS Classes	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.50	=	1.75
Behavioral Traits	37.5%	50%	x	3.58	=	1.79
Supervisory Factors	25%	N/A	x	N/A	=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.54

Comments:

SIGNATURE

Supervisor:

Date

4-25-24

Supervisor Name (print):

CE

Date:

4/28/2024

Comments:

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature

Date:

4-25-24

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to participate in GIS of Infrastructure to include line breaks, line locates, new installs, ETC.**

Item carried over from previous year - YES NO

2. **Continue to gain more knowledge of the distribution system, meter department and treatment plant.**

Item carried over from previous year - YES NO

3. **Continue to participate in KRWA Apprenticeship Program**

Item carried over from previous year - YES NO

4. **Take [REDACTED] Test.**

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED]

Date: 4-25-24

Employee's Signature: [REDACTED]

Date: 4-25-24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/30/24	Period of Evaluation:	4/30/23 to 4/30/24

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
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- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	4.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	2.6
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.8
Section Score: 3.35	

Comments:

[REDACTED] knowledge of the treatment process, monitoring the SCADA and distribution system allows [REDACTED] to exceed the companies' expectations. [REDACTED] does an Excellent Job with Customer Complaints. [REDACTED] did not get [REDACTED] portion of the end of line hydrants flushed. [REDACTED] does a good job of communicating.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	2.0
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.2
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 2.64	

Comments:

██████████ needs to show more initiative and take more responsibility for monitoring projects on ██████████ own. For example, water loss, Bac-T scheduling (not on disconnect day) and completing ██████████ portion of the end of line flushing. ██████████ keeps ██████████ truck clean and organized but could keep the ██ cleaner.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to work closely with outside contractors monitoring sampling equipment to improve water quality and record keeping.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain mechanical knowledge of the treatment plant, the new monitoring systems, to include running generators @ Plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Continue to participate in GIS, Field Comm Collector and Hydrant Flushing 2.0.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.35	=	1.68
Behavioral Traits	37.5%	50%	x	2.64	=	1.32
Supervisory Factors	25%	N/A	x	N/A	=	0
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.00

Comments:

██████████ is a good ██████████ ██████████ does an excellent job with customer complaints and monitoring the SCADA System.

SIGNATURE

Supervisor: ██████████

Date: 4-26-24

Supervisor Name (print): ██████████

C

Date: 4/28/24

Comments: []

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: ██████████

Date: 4/26/24

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to Participate in GIS System, Field Comms and Flushing 2.0**

Item carried over from previous year - YES NO

2. **Continue to gain knowledge of the mechanical part of the Treatment Plant to include running generators @ Plant.**

Item carried over from previous year - YES NO

3. **Continue to work closely with outside contractors monitoring sampling equipment to improve water quality and record keeping.**

Item carried over from previous year - YES NO

4. **Work with [REDACTED] to incorporate a system wide flush to prevent dirty water calls.**

Item carried over from previous year - YES NO

Supervisor's Signature: [REDACTED]

Date: 4-26-24

Employee's Signature: [REDACTED]

Date: 4/25/24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/29/2024	Period of Evaluation:	4/29/2023 to 4/29/2024

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

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DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
---------------------------	---

MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
----------------------	---

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
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- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.0
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.5
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.38	

Comments:

████████ skills and abilities are very good, ███ is productive and meets work deadlines. ███ has taking ownership to the service line inventory inspection program. There is no need to go back and check to see if ███ done it correctly. █████ keeps a positive attitude and works well with others. ███ follows work rules and works safely. ███ operates the equipment safely, with care and keeps up with preventive maintenance schedules.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.2
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.8
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	4.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.3
Section Score: 3.86	

Comments:

██████ is a model employee. █████ works well with all employees; █████ is always willing to help or assist others. █████ monitors █████ projects independently and rarely needs help. █████ keeps █████ truck, equipment, paperwork, clean and organized. █████ keeps up with the maintenance of all equipment without any prompting to complete that task. █████ has no issues in having to adapt to changing workload. █████ analyzes problems correctly and effectively.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	3.4
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	3.2
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	3.2
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	3.5
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	3.5
Section Score: 3.36	

Comments:

██████ is a good crew leader; █████ brings out the best in those █████ works with. █████ has no problem delegating work to █████ service workers and planning their day is no issue. █████ is very good with time management; █████ keeps himself busy until it is time to go home. █████ seems to communicate well with █████ service workers and they like working with █████

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Continue to participate in GIS of infrastructure to include line breaks and new services.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Finish getting ride along.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Obtain Distribution License	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Certified Meter Tester and UMI Classes	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue to participate in GIS of infrastructure to include line breaks and new services.**

Item carried over from previous year - YES NO

2. **Finish Service Line Inventory Inspections.**

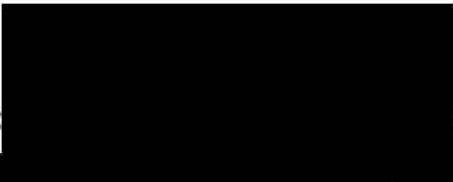
Item carried over from previous year - YES NO

3. **Read & Understand OCWD Installation Specifications to become an Inspector.**

Item carried over from previous year - YES NO

4. **Certified Meter Tester and UMI Classes**

Item carried over from previous year - YES NO

Supervisor's Signature: 

Date: 4-26-24

Employee's Signature: 

Date: 4-26-24



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :			
Job Title:			
Supervisor Conducting Review:			
Date:	4/19/24	Period of Evaluation:	4/19/23 to 4/19/24

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.0
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.3
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.5
Section Score: 3.20	

Comments:

██████████ skills and abilities are good, ████ has not changed much from last year. ████ has a positive attitude (most of the time). ████ attitude changes depending on who tells ████ what to do, who ████ works with and if ████ is working by himself or not. ██████████ communicates well, listens, and responds appropriately to daily duties.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	2.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	2.0
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 2.80	

Comments:

██████ works well with others and is always willing to lend a helping hand. █████ does not seek greater responsibility and has a hard time doing projects independently. █████ needs to improve in █████ housekeeping by keeping trucks and tools clean and organized. Keep trash picked up and put things back where █████ found them. █████ second guess █████ and is always asking for assistances. █████ needs to understand OCWD policies and procedures.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score: N/A	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
List from Previous Review 1. Project/Objective/Special Assignment Continue participating in GIS of Infrastructure to include line breaks and new installs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Continue to gain more knowledge of distribution system and treatment plant.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment Work towards [REDACTED]	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment Work towards getting CDL.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		
Comments:		

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.20	=	1.60
Behavioral Traits	37.5%	50%	x	2.80	=	1.40
Supervisory Factors	25%	N/A	x	N/A	=	N/A
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.00

Comments:

██████████ has had a good year at OCWD. ██████████ has gained a lot of experience.

SIGNATURES:

Supervisor: ██████████ Date: 4/24/2024
4/10/2024

Supervisor Name (print): ██████████

CE ██████████ Date: 4/28/2024

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Employee Signature: ██████████ 4-24-24

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Continue participating in GIS of infrastructure to include line breaks and new installs.**

Item carried over from previous year - YES NO

2. **Continue to gain more knowledge of the distribution system and treatment plant.**

Item carried over from previous year - YES NO

3. **Take [REDACTED] test.**

Item carried over from previous year - YES NO

4. **Work towards Distribution or Treatment Licenses.**

Item carried over from previous year - YES NO

Supervisor's Signature:

[REDACTED]

e: 4-24-24

Employee's Signature:

[REDACTED]

4-24-24

Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :	[REDACTED]		
Job Title:	[REDACTED]		
Supervisor Conducting Review:	[REDACTED]		
Date:		Period of Evaluation:	3/31/2023 – 3/31/2024

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.

The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = **UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = **NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = **MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = **EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = **SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee’s use of established techniques, materials and equipment as they relate to performance.	3.0
Quantity of Work – Consider the results of this employee’s efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.0
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	4.0
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.0
Section Score: 3.25	

Comments:

█████ exhibits a strong proficiency in █████ skills, leveraging █████ knowledge effectively to execute tasks with diligence and precision. █████ commitment to maintaining high standards in █████ work, coupled with █████ adherence to compliance requirements, ensures that █████ contributions consistently meet or exceed expectations.

In addition to █████ professional responsibilities, Rachel's dedication to completing █████ Bachelor's degree is noteworthy. Despite the demands of █████ academic pursuits, █████ remains focused and determined to achieve █████ educational goals, showcasing █████ resilience and time management skills.

Furthermore, █████ communication abilities contribute to effective collaboration, but I would like to see █████ take a more positive stance with █████ co-workers.

Overall, █████ balanced approach to █████ work and education underscores █████ commitment to personal and professional growth, making █████ a valuable asset to any team.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	4.0
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.3
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	4.0
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.0
Section Score: 3.56	

Comments:

██████ behavioral traits are truly commendable, reflecting █████ exceptional character and values. █████ consistently demonstrates a willingness to contribute wherever possible. Whether it's volunteering for additional tasks or offering assistance to colleagues, █████ proactive approach exemplifies █████ dedication to the collective success of the team.

What sets █████ apart is █████ remarkable ability to do so without complaint. Despite the challenges or workload, █████ maintains a positive attitude and remains focused on finding solutions rather than dwelling on obstacles. This resilience and optimistic outlook not only inspire those around █████ but also contribute to a more harmonious and productive work environment.

Furthermore, █████ considerate nature shines through in █████ interactions with others.

In essence, █████ behavioral traits serve as a cornerstone of █████ professionalism, enhancing █████ effectiveness as a team member. █████ willingness to contribute, coupled with █████ positive attitude and considerate demeanor, makes █████ an invaluable asset to OCWD.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment Develop new ideas on how to integrate social media into the day-to-day operations of the District.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment Feature OCWD employees and projects with social media	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>

Results in this section may be cause for a change to the overall score.

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.25	=	1.63
Behavioral Traits	37.5%	50%	x	3.56	=	1.78
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 - 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.41

Comments:

SIGNATURES

Supervisor

Date: 4/25/2024

Supervisor Name (print):

Client

Date:

4/23/2024

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

I am thankful for the opportunity to be a part of such an amazing organization and an outstanding team of leaders. The benefits provided for employees are a significant advantage. This position has truly been a blessing in my life, providing me with opportunities

Employee Signature

Date:

4/29/24

to enhance my education and work alongside a fantastic team. I am appreciative of the opportunity for growth both personally and professionally

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. | |

Item carried over from previous year - YES NO

2. | |

Item carried over from previous year - YES NO

3. | |

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature: _____ **Date:** _____

Employee's Signature: _____ **Date:** _____



Annual Employee Performance Evaluation

Review Information

Employee's Name (First Last) :	[REDACTED]		
Job Title:	[REDACTED]		
Supervisor Conducting Review:	[REDACTED]		
Date:		Period of Evaluation:	1/31/2023 – 1/31/2024

INSTRUCTIONS TO RATER

Listed below are four performance factors, five behavioral traits, three work habits, five supervisory factors, and a review of the projects/objectives/special assignments for the past year that are important in the performance of the employee's job. The supervisor factors should be utilized only for employees with supervisory responsibilities.

NOTE: Ratings are 1 thru 5 to the nearest tenth using the rating scale below as a guide. Ratings that are 2.4 or lower and 3.5 or higher requires comments.

The "overall performance" evaluation should reflect the employee's total performance, including the performance factors as related to the employee's responsibilities and duties as set forth in the job description, behavioral traits, work habits and supervisory factors, if applicable.

DISTRIBUTION INSTRUCTIONS	<ol style="list-style-type: none"> 1. Return the original form to OCWD human resources 2. Maintain one copy for your departmental records. 3. Distribute one copy to the employee.
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MARKING INSTRUCTIONS	<ol style="list-style-type: none"> 1. The supervisor should indicate the employee's performance by rating the appropriate level of performance for each area reviewed. 2. Any score other than a (2.5 – 3.4) requires comments by the supervisor.
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The following rating scale guide is being provided to assist the evaluator in assigning the most appropriate measurement of the employees' performance factors, behavioral traits and supervisory factors.

- 1 = UNACCEPTABLE** - Consistently fails to meet job requirements; performance clearly below minimum requirements. Immediate improvement required to maintain employment.
- 2 = NEEDS IMPROVEMENT** – Occasionally fails to meet job requirements; performance must improve to meet expectations of position.
- 3 = MEETS EXPECTATIONS** – Able to perform 100% of job duties satisfactorily. Normal guidance and supervision are required.
- 4 = EXCEEDS EXPECTATIONS** – Frequently exceeds job requirements; all planned objectives were achieved above the established standards and accomplishments were made in unexpected areas as well.
- 5 = SUPERIOR** – Consistently exceeds job requirements; this is the highest level of performance that can be attained.

PERFORMANCE FACTORS	
	RATING 1 THRU 5 TO THE NEAREST TENTH
Knowledge, Skills, Abilities – Consider the degree to which the employee exhibits the required level of job knowledge and/or skills to perform the job and this employee's use of established techniques, materials and equipment as they relate to performance.	3.5
Quantity of Work – Consider the results of this employee's efforts. Does the employee demonstrate the ability to manage several responsibilities simultaneously; perform work in a productive and timely manner; meet work schedules.	3.5
Compliance – To what extent does the employee display a positive, cooperative attitude toward work assignments and requirements? Consider compliance with established work rules, safety and organizational policies.	3.5
Communication – Consider job related effectiveness in dealing with others. Does the employee express ideas clearly both orally and in writing, listen well and respond appropriately?	3.5
Section Score: 3.5	

Comments:

██████ demonstrates exceptional proficiency across a spectrum of skills, showcasing a depth of knowledge that enhances █████ ability to excel in any task or project █████ undertakes. █████ diligent work ethic is reflected in both the quality and quantity of █████ output, consistently delivering results that meet or exceed expectations. Moreover, █████ unwavering commitment to compliance ensures that all work is conducted within the parameters of relevant regulations and guidelines, mitigating risks and promoting a culture of integrity.

Furthermore, █████ effective communication skills serve as a cornerstone for collaboration and success within OCWD. This seamless integration of skills, knowledge, and communication not only fosters productivity but also cultivates a positive work environment conducive to innovation and growth.

BEHAVIORAL TRAITS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Cooperation – How well does the employee work with co-workers and supervisors as a contributing team member? Does the employee demonstrate consideration of others; maintain rapport with others; help others willingly?	3.5
Initiative – Consider how well the employee seeks and assumes greater responsibility, looks for and suggest improvements; monitors projects independently, and follows through appropriately.	3.5
Neatness/Organized – Consider to what extent the employee keeps assigned area and or vehicle clean and neat. Presents materials in an organized and legible manor.	3.5
Adaptability – Consider the ease with which the employee adjusts to any change in duties, procedures, supervisors or work environment. How well does the employee accept new ideas and approaches to work, respond appropriately to constructive criticism and to suggestions for work improvement?	3.5
Judgment – Consider how well the employee effectively analyzes problems, determines appropriate action for solutions, and exhibits timely and decisive action; thinks logically. Refers to OCWD policies when making decisions.	3.5
Section Score: 3.50	

Comments:

██████████ commitment is truly commendable. ██████████ proactive approach reflects ██████████ dedication to the collective success of OCWD.

Moreover, ██████████ considerate nature shines through in every interaction, as ██████████ demonstrates genuine empathy and understanding towards ██████████ peers. ██████████ takes the time to actively listen to others' perspectives, offering support and encouragement when needed and fostering a culture of inclusivity and respect. ██████████ ability to prioritize the well-being and needs of others not only strengthens team dynamics but also builds trust and camaraderie within the workplace.

WORK HABITS

	ACCEPTABLE	UNACCEPTABLE
Attendance — Consider number of absences; use of sick leave in accordance with OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Punctuality — Consider work arrival and departure in accordance with departmental and OCWD policy.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Appearance — Wears uniform as required or adhere to other established standards for clothing as required by OWD policies and or supervisor. Uses appropriate taste, good grooming, safety and consideration of others in governing appearance, including neatness and cleanliness.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

SUPERVISORY FACTORS

	RATING 1 THRU 5 TO THE NEAREST TENTH
Leadership – Consider how well the employee demonstrates effective supervisory abilities; gains respect and cooperation; inspires and motivates subordinates; directs work group toward common goal.	
Delegation – How well does the employee demonstrate the ability to direct others in accomplishing work; effectively select and motivate staff; define assignments; oversee the work of subordinates?	
Planning and Organizing – Consider how well the employee plans and organize work; coordinates with others and establishes appropriate priorities; anticipates future needs; carries out assignments effectively.	
Administration – How well does the employee perform day-to-day administration tasks; manage time; administer policies and implement procedures; maintain appropriate contact with supervisor and utilize funds, staff or equipment?	
Personnel Management – Consider how well the employee serves as a role model; provides guidance and opportunities to their staff for their development and advancement; resolves work-related employee problems; assists subordinates in accomplishing their work-related objectives. Does the employee communicate well with subordinates in a clear, concise, accurate, and timely manner and make useful suggestions?	
Section Score:	

Comments:

REVIEW OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE PAST YEAR

Where projects, objectives, special assignments, etc. have been clearly established, progress of these tasks should be evaluated. List and evaluate progress made on projects, objectives and special assignments by marking the appropriate box. If circumstances exist that do not reflect the efforts of the employee's progress, satisfactory progress should be selected. The Comments space may be used for satisfactory progress but must be used for unsatisfactory progress. Attach additional sheets if necessary.

List from Previous Review	SATISFACTORY PROGRESS	UNSATISFACTORY PROGRESS
1. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
2. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
3. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
4. Project/Objective/Special Assignment	<input type="checkbox"/>	<input type="checkbox"/>
Results in this section may be cause for a change to the overall score.		

Comments:

OVERALL PERFORMANCE						
	Supervisory	Non-Supervisory	Multiplied by	Rating	=	Total Rating
Performance Factors	37.5%	50%	x	3.5	=	1.75
Behavioral Traits	37.5%	50%	x	3.5	=	1.75
Supervisory Factors	25%	N/A	x		=	
Work Habits						
Projects/Objectives/Special Assignments						
Overall Rating	4.5 – 5.0 SUPERIOR	3.5 - 4.4 EXCEEDS EXPECTATIONS	2.5 - 3.4 MEETS EXPECTATIONS	1.5 - 2.4 NEEDS IMPROVEMENT	1.0 - 1.4 UNACCEPTABLE	
	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3.5

Comments:

SIGNATURES:

Supervisor: _____ Date: 4/25/2024

Supervisor Name (print): | _____ |

Date: 4/25/2024

Comments: | |

TO THE EMPLOYEE:

I have been advised of my performance ratings. I have discussed the contents of this review with my supervisor. My signature does not necessarily imply agreement. My comments are as follows (optional) (attach additional sheets if necessary):

Thank you for the opportunity to work with such a great team! I really appreciate the benefits that CEWD is able to offer!

Employee Signature: _____ Date: 4/25/24

APPENDIX 1: ESTABLISHMENT OF PROJECTS/OBJECTIVES/SPECIAL ASSIGNMENTS FOR THE COMING YEAR (IF APPLICABLE)

List below the projects, objectives or special assignments which should be continued and/or completed in the coming year. It is understood that these projects, special assignments, objectives, etc. are subject to adjustment or change as situations and priorities change. This section should be detached and kept in departmental files so that it can be updated as the situation warrants and so that it can be used to assist the supervisor at the end of the next evaluation period. Attach a copy of this completed form to the performance evaluation.

PROJECT/OBJECTIVES/SPECIAL ASSIGNMENTS

1. **Create and establish a 20 year plan for the Board to review and approve.**

Item carried over from previous year - YES NO

2. **Upgrade construction specifications.**

Item carried over from previous year - YES NO

3. | |

Item carried over from previous year - YES NO

4. | |

Item carried over from previous year - YES NO

Supervisor's Signature 

Date: 4/26/2024

Employee's Signature 

Date: 4/26/24