

Replaces (TUL-4192 and 4334))

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FINAL  
\_\_\_\_\_  
REGULAR  
\_\_\_\_\_  
SPECIAL

**PERFORMANCE PLANNING AND REVIEW RECORD - EXEMPT & NON-EXEMPT**

Employee: \_\_\_\_\_ Department: Parks & Recreation

Employee Number: 104814 Division: Parks Supervisor: Lee Anne Zeigler

Classification: AT-23 Recreation Coordinator Planning Date: \_\_\_\_\_ Review Date: 12/4/2014

*LAZ*  
\_\_\_\_\_

The purpose of the Performance Planning and Review (P.P.R.) process is to improve performance by promoting mutual understanding and agreement between employees and supervisors as to the employee's job responsibilities, key projects and work objectives for the upcoming evaluation period as well as the performance standards to be used in measuring performance. The steps in the process are as follow:

1. At the start of employment or beginning of a performance evaluation period, the supervisor and employee meet to discuss and record job responsibilities, key projects, work objectives and performance standards and agree on these items as well as developmental activities which are to be reflected on the P.P.R. form. The employee and supervisor should each keep a copy of the form.
2. A subsequent review meeting of the employee and supervisor should be held at least one time during the review period, to review the employee's performance and to discuss any changes in job responsibilities, key projects, work objectives or related standards. (See PPM Section 703.)
3. At the conclusion of the performance evaluation period, the supervisor and employee meet to discuss evaluation of the employee's performance in accordance with established standards. If appropriate, a pay administration decision will be made based, at least in part, on that evaluation.
4. The completed form is submitted to the Human Resources Department with an accompanying Personnel Action form to adjust the employee's pay rate, if appropriate.
5. A new P.P.R. form is completed which again establishes job responsibilities, key projects, work objectives, standards, and developmental activities for the upcoming evaluation period.

**PART I. - JOB RESPONSIBILITIES, KEY PROJECTS, WORK OBJECTIVES AND PERFORMANCE STANDARDS ("City Values" additions listed as items 1 through 4)**

**I. Job Responsibility/Project/Objective (A) Performance Standard (B)**

- 1A. Take personal responsibility for providing internal and external customers with the most cost efficient, prompt, and highest quality services possible.
- 1B. Respond to customer complaints as soon as investigation is finished.
- Meets: No more than three substantiated complaints. E-mails are responded to within 24 hours.
  - Meets: Evaluations will be available on-line for each class in program guide and results recorded.
  - Exceeds: 85% return on evaluations for all successful programs and activities.
  - Exceeds: Building will be open a minimum of 65 hours a week including weekends and evenings. No substantiated complaints.

Rating Comments: No Complaints; public very enthusiastic about  
\_\_\_\_\_ diligence and efforts at waterworks. \_\_\_\_\_ is  
always willing to work when needed and is an excellent  
team member.

2A. Take personal responsibility for seeking continuous improvement in departmental and City work efforts.

2B. Suggest or implement improvements in service delivery.

**Meets:** Two new and original suggestions at the center site are implemented.

**Exceeds:** One idea implemented for the department or four suggestions implemented for the site.

Rating Comments:

██████ has put into effect necessary signage and organized Clay Area. Rental binder is also better organized and streamlined.

3A. Take responsibility for continuous learning; attend appropriate training, education, and apply new and improved job skills.

3B. Attendance of training, education, and review of job skills based behavioral changes.

**Meets:** Current certification in First Aid, CPR, complete 2 job related educational training classes

**Meets:** Consistently track attendance and other weekly reports that are assigned.

**Exceeds:** Become a Certified Instructor in related field, and teach 2 classes.

Rating Comments:

██████ is currently certified CPR/First Aid instructor and taught 3 classes in 2014.

4A. Programs will be monitored and adjusted for optimum enrollment or attendance and value of services.

4B. Programs will use budgets, monthly reports, attendance, questionnaires, and evaluations to measure profitability and customer value.

**Meets:** Conduct a lifecycle evaluation, establishing service objectives for each program listed in the program guide and record monthly.

**Meets:** Revenue targets will be met to comply with budget of classes.

**Exceeds:** Create a timeline for all program planning and give examples of effectiveness. Increase 2013 revenue by an average of 10% per class.

Rating Comments:

██████ uses existing formula to determine service objectives.

5A. Design new customer driven programs at appropriate fees. Program information will be easily accessible and readily available to the public (including date, time, place, cost and events.)

5B. Programs will begin and end on time.

**Meets:** Create classes for Fun Guides one month prior to schedule- July (Fall) October (Winter) February (Spring) April (Summer)

**Meets:** Update Social Media page at least once a week and document. Increase "Friends" by 20%.

**Meets:** Will initiate 6 innovative programs with at least 8 people in attendance. Offer at least one class using the WIN, Fire, Police Dept. or other City department.

**Meets:** Generate on-line brochures for classes as well as postcards and/or e-mails for reminders.

**Exceeds:** More than 10 innovative programs with at least 8 people in attendance. Create at least 1 program for Childhood Obesity month and 1 program for 50+ with at least 8 people in attendance.

**Rating Comments:**

██████ Holiday Art Show + Sale promotion / Flyer production.

- 6A. Day Camp program will stay in compliance with ACA standards.  
6B. Staff will be hired by May 1, 2014. Offer camps and specialized programs during out of school time.

- Meets:** Oversee day camp budgets for each camp session.  
 **Meets:** Background checks for seasonal staff, volunteers or contractors will be on file 48 hrs. before reporting to work.  
 **Exceeds:** Add a new theme to the Day Camp theme book for 2014 or submit a minimum of 10 ideas for activities related to 2014 themes.

Rating Comments:

- 7A. Center facilities, grounds and equipment will be safe/clean/well maintained.  
7B. Inspect, create work orders or perform tasks as needed to insure safe programs and sites.

- Meets:** No loss of equipment due to negligence. Issue TMAs in a timely manner as needed.  
 **Exceeds:** Perform pool checks twice a week if applicable or as assigned.

Rating Comments:

Diligence and follow-thru re: ceramics & glass kilns; facility upkeep is important to ~~center~~.

- 8A. Will follow financial procedures for center and department.  
8B. Will work within budget allocation for the fiscal year.

- Meets:** Stay within budget allocation, P-Card log reports correct. Fewer than 5% mistakes in deposits. Overall instructor taught classes will make a 20% profit.  
 **Meets:** Deposits and cash reports will be turned in daily.  
 **Exceeds:** No mistakes in cash desoposits, P-Card logs.

Rating Comments:

- 9A. Will offer Special Event programming  
9B. Special Events will be offered to the public to all ages at a minimal cost.

- Meets:** Participate on at least 1 Specialist committee per year.  
 **Meets:** Assist in 2 Department Special Events or activities and coordinate/ conduct 3 Center Special Events.  
 **Exceeds:** Will assist in 4 department Special events and coordinate /conduct 5 center events within the fiscal year including 1 new Special events at center.

Rating Comments:

CAPRA involvement; ~~ORPS involvement~~  
Lifeguard Olympics; Kids Triathlon; Hershey Track & Field (cancelled)

10A. Become involved with a neighborhood association and/or community programming.

10B. Be recognized as a leadership resource for youth.

**Meets:** Become involved in at least one community outreach program and attend at least 2 meetings/programs

**Exceeds:** Regularly attend 2 outreach programs.

Rating Comments:

\* Mental Health Assoc. of Oklahoma ("Ask A Question Save A Life" program).

11A. Take personal responsibility to ensure that subordinates comply with all Safety program accountabilities appropriate to their jobs.

11B. Demonstrate a positive safety culture by your actions and decisions. Take prompt action on all safety issues and violations by employees. Alleviate workers compensation cases by being diligent in pre-planning or training.

**Meets:** Have employees attend safety classes that are job specific as offered by COT.

**Exceeds:** Organize and implement a safety class or seminar at your site that all can attend.

Rating Comments:

## PART II - GENERAL WORK BEHAVIOR RATINGS

Rate how the employee's on the job behavior conforms to the level expected by the supervisor (as applicable).

A. **Work Habits & Attitudes** (Follows rules and instructions; cooperates; competent.)

excels in his work ethic and overall attitude toward job responsibilities, staff, and patrons.

B. **Relationships with Others** (Coworkers; supervisor; public.)

demonstrates a winning attitude and his enthusiasm for others is excellent.

C. **Personal Qualities** (Dependable; initiative; orderliness.)

is very dependable takes initiative to create order and is also exceptionally organized & clean.

D. **Manager or Supervisor** (Planning, organizing, meeting deadlines)

plans and organizes his day with manager. Deadlines are met.

E. **Attendance** (Punctual; sick leave use; leave w/o pay use.)

Punctuality is a strongpoint; no issues.

Sick leave and LWOP Last 12 month no LWOP Accrued Sick leave 660 hrs.

LTS

**Part III. -IMPROVEMENT OPPORTUNITIES**

(List any noted opportunities to enhance performance)

Learn more about equipment: pottery wheels, kilns, etc.  
Improve facility, rentals for events.  
Create new programming ideas + facilitate.

**PART IV. - CAREER GROWTH AND DEVELOPMENTAL OBJECTIVES**

Developmental - Current Position

Kiln training (Yusuf Etudaiye)  
Took Glaze Application class -  
Vice-President ORPS 2015 ; attended ORPS Conf. (Lawton)

Promotional /Career improvements

~~Attended ORPS Conf~~

**PART V. - FINAL RATINGS**

- (E)  Exceptional - Performance/skills exceed almost all standards and/or exceed all critical standards.
- Very Proficient - Performance/skills meet all standards and exceed some standards.
- (P)  Proficient - Performance/skills meet standards.
- Need Some Improvement- Performance/skills generally meet standards but slightly below on particular area(s).
- (I)  Inadequate (\*required) - Performance/skills below expected standards in many areas or critical area(s) described under remedial activities.

\* See Remedial Actions

**REMEDIAL ACTIONS**

none

**FINAL RATING COMMENTS**

Employee: THOROUGHLY ENJOYING MY NEW POSITION. I AM LEARNING  
SO MUCH AND LOOK FORWARD TO LEARNING ADDITIONAL + IMPROVING  
THE PROGRAM QUALITY AT WATERWORKS.

Supervisor: [redacted] is an asset to our facility and I am  
pleased to welcome him to WaterWorks - he hit  
the ground running and hasn't stopped!

Review Session  
Supervisor's initial      Date  
\_\_\_\_\_

Review Session  
Supervisor's initial      Date  
\_\_\_\_\_

Review Session  
Supervisor's initial      Date  
\_\_\_\_\_

Employee's initial      Date  
\_\_\_\_\_

Employee's initial      Date  
\_\_\_\_\_


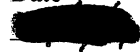
Employee's initial      Date  
\_\_\_\_\_

**Planning Session**  
Supervisor's signature      Date  
\_\_\_\_\_

Employee's signature      Date  
\_\_\_\_\_

Reviewing Official      Date  
\_\_\_\_\_

**Final Review Session**  
Supervisor's signature      Date  
*W. A. Zeigler*      12-4-14

Employee's signature      Date  
      

Reviewing Official      Date  
*W. A. Zeigler*      12-4-14