

Supervisor Annual Review

Manager Evaluation - View

Scott Grigg

Job Title: Financial Operations Supervisor
Document Type: Supervisor Annual Review
Template: Supervisor Annual Review
Status: Approval - Approved - Approved

Manager: Kenneth Maun
Period: 10/01/2016 - 09/30/2017
Document ID: 76404
Due Date: 08/22/2017

Section 1 - Mission Statement

Mission 1: 3101-Tax Assessor

Description :

It is the duty of the Tax Assessor and Collector to assess and collect for the County all taxes imposed on property within the county. The County Tax Assessor and Collector is designated by statute as the agent for the state Department of Highways and Public Transportation for collection of motor vehicle fees. Under the registration statutes, every owner of a motor vehicle is required to register it with the tax assessor in the county in which the owner resides. The County Tax Assessor and Collector is required to make bank deposits and reports according to the terms of several statutes. Under the laws regulating the county depository, the county tax collector is required to deposit all taxes collected by him for the state, county, or special districts for which he collects taxes.

Section 2 - Employee Goals

Goal 1: Customer Service

Description :

Reflect the philosophy of the elected official. Be available to customers, employees, and co-workers, and other department heads. Present a positive atmosphere. Manages difficult customer situations, responds promptly to customer needs and questions, such as on productivity questions. Offers assistance and support to employees and co-workers at all times. Be courteous to all.

Measurement :

Supervisor and clerks will be observed to ensure levels of customer service. Feedback from taxpayers, other supervisors and other sources will be evaluated to ensure positive service continues to be provided. The level of information being provided the the other departments and reports to all entities that we serve.

Manager Rating: 3-Exceeded

Weight: 30%

Manager Comments:

Scott has worked to catch up the general ledger accounts that had been left with questions, and has corrected practices that had not been followed in the transitions of leadership in the accounting area. He has spent considerable time with supervisors to develop productivity guidelines which were acceptable to the motor vehicle supervisors and which reflected the work done by the employees. This took considerable time and coordination.

Created By : Laura Boatright

08/24/2017 10:55AM

Goal 2: Plan, Manage and Supervise

Description :

Plan, Manage and Supervise Supervise the work of seven (7) employees in the Accounting Department. Two (2) of the employees are back-up supervisors and five (5) are clerks. Monitor (audit) the production work of all employees in the Collin County Tax Office and provide feedback to the other department supervision and management.

Measurement :

Reviewing the presence of the personnel, their work ethic, positive relationship with their group and with other departments, and monitoring the timeliness and accuracy of standard reports and additional requested information.

Manager Rating: 2-Strong Performance

Weight: 15%

Manager Comments:

He has worked well, using some of the research to train personnel to the correct practices with the accounts and the general ledger. He has been working on some to the cross-training appropriate for the office.

Created By : Laura Boatright

08/24/2017 10:56AM

Goal 3: Training

Description :

Review accounting systems with personnel to demonstrate the most accurate and efficient methods of processing information and getting the desired reports. Develop and implement computer systems to control new collections required by new legislation but not supported by current systems.

Measurement :

Observing the knowledge level of the personnel, the data and other information being processed, the questions and performance of the clerks. Attendance at the regional and state meetings, and discussions of the laws, procedures and other factors affecting our office and our reporting and data retention.

Manager Rating: 2-Strong Performance

Weight: 15%

Manager Comments: In his work on correcting errors in the accounting system, he has been reviewing the practices with the employees to install the correct procedures to have correct information in the future.

Created By : Laura Boatright

08/24/2017 10:57AM

Goal 4: Security

Description :

Review all basic documents and reports to determine that funds of the office have been deposited correctly and that all funds are being correctly accounted for and distributed according to the laws and agreements. Prepare the permanent financial reports for the Collin County Tax Office on a monthly basis. Prepare special request financial reports on an as needed basis.

Measurement :

Monitor the timeliness and accuracy of the reconciliations of banks and other accounts, the timeliness of monthly reporting to the state, county and office of data, production information and monies. The ability to respond to the reports by the county auditor office. Monitor the timeliness of money transfers to all entities. Being aware of the timeliness, reporting and detail of any irregularities, or reports of any unusual items.

Manager Rating: 2-Strong Performance

Weight: 40%

Manager Comments: Scott has been working with the reporting to standardize the work, to ensure the accuracy of the reporting and be sure that the employees are aware of the correct methods of accomplishing the work and preparing accurate reports. He has been reviewing our actions to satisfy the auditors office at the same time as ensuring the most complete security procedures within our systems.

Created By : Laura Boatright

08/24/2017 10:59AM

Goals Summary

Manager Rating: 2-Strong Performance

Summary Weight: 100%

Section 3 - Training

Attend Courses

Description :

Take course, working towards a PCC and CTOP designation.

Manager Comments: Scott has participated in several state and regional conferences and taken sever courses related to the Property Tax Code and administration of the tax office.

Created By : Laura Boatright

08/24/2017 10:59AM

Section 4 - Competencies

Competency 1: Job Knowledge

Description :

Demonstrates technical skills or knowledge required for key components of the job. Conducts job duties in accordance with county rules, regulations and ethical standards. Demonstrates sound judgement.

Manager Rating: 2-Strong Performance

Manager Comments: Scott is aware of the various demands and knowledge to satisfy the requirements of the office, county and state agencies to whom we report.

Created By : Template

08/29/2017 4:56PM

Competency 2: Communication

Description :

Courteous to internal and external customers. Responds appropriately to requests for assistance. Able to express ideas and information clearly and effectively through appropriate medium (verbal, written or electronic).

Manager Rating: 2-Strong Performance

Manager Comments: Scott is able to communicate appropriately for the tax office.

Created By : Template

08/29/2017 4:56PM

Competency 3: Effectiveness

Description :

Demonstrates accuracy and attention to detail. Follows activities through to completion. Identifies areas for improvement and seeks appropriate solutions. Performs duties in a timely manner and meets deadlines. Completes an acceptable volume of work.

Manager Rating: 2-Strong Performance

Manager Comments:

This year Scott has been finalizing the correction to the remaining accounts which needed correction. This has required a complete analysis of the account history, determining the correct maintenance for that account, and training the personnel to post correctly and report. He has also had the bank reconciliations on a timely process to meet the correctness by the 10th of the month.

Created By : Template

08/29/2017 4:56PM

Competency 4: Conduct/Work Habits

Description :

Cares for materials, equipment and the work area. Conveys a positive and professional image. Willingly accepts supervision. Keeps management informed of potential issues.

Manager Rating: 2-Strong Performance

Manager Comments: Scott ensures that the accounting employees have the needed equipment, that they use it, and maintain it for current use.

Created By : Template

08/29/2017 4:56PM

Competency 5: Teamwork

Description :

Establishes and maintains effective relations both within the department and with other departments. Offers assistance and support to coworkers.

Manager Rating: 2-Strong Performance

Manager Comments: Scott has worked with the motor vehicle supervisors on productions reports, which is a difficult task, and has improved his communication and teamwork skills on this major project.

Created By : Template

08/29/2017 4:56PM

Competency 6: Planning and Organizing

Description :

Sets priorities effectively. Uses time and resources efficiently. Works in an organized manner. Anticipates and resolves problems.

Manager Rating: 2-Strong Performance

Manager Comments: With all that is going on in the accounting and reporting area planning and organizing is a basic by-word.

Created By : Template

08/29/2017 4:56PM

Competency 7: Leadership

Description :

Recommends appropriate courses of action. Ability to think strategically and align department goals with overall

county objectives. Ability to persuade others to take action. Leads by example. Promotes a cooperative work environment.

Manager Rating: 2-Strong Performance
Manager Comments:

Created By : Template

08/29/2017 4:56PM

Competency 8: Personnel Management

Description :

Coaches and motivates staff. Recruits, selects and retains capable, productive employees. Assesses and provides for employee development and succession planning. Takes corrective action on employee issues in a timely manner.

Manager Rating: 3-Exceeded

Manager Comments: The accounting staff had limited training and support previously. Scott has worked with the staff to help them understand the why's as well as the what's in accounting transactions and reports. He is instituting cross-training of the staff to form an efficient team.

Created By : Template

08/29/2017 4:56PM

Competencies Summary

Manager Rating: 2-Strong Performance

Section 5 - Manager Comments

Manager Comments:

Section 6 - eSignature Section

Attachments

No Attachments have been added to this document

Audit History

Created By :	Caitlin Niemann	08/29/2017 4:56:25PM
Transferred From :	Laura Boatright	08/29/2017 4:57:38PM
Transferred To :	Kenneth Maun	08/29/2017 4:57:38PM
Transferred By :	Caitlin Niemann	08/29/2017 4:57:38PM
Last Modified By :	Kenneth Maun	08/31/2017 4:17:31PM