

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: 10/01/2017 - 07/31/2018
Document ID: 82420
Due Date: 07/12/2018

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: 2-Strong Performance

Weight: 30%

Manager Comments:

Created By : Kenneth Maun

05/31/2018 4:23PM

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: 3-Exceeded

Weight: 15%

Manager Comments: Scott has worked with the supervisors to better process, calculate and prepare the productivity results which are the basis of the motor vehicle measures. This has taken considerable cooperation and analysis.

Created By : Kenneth Maun

05/31/2018 4:24PM

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: He has attended several state and regional meetings and met with the financial people at many offices, and gotten benefit from these discussions.

Created By : Kenneth Maun

05/31/2018 4:25PM

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: We are all constantly paying attention to security with an office that collects \$3 billion.

Created By : Kenneth Maun

05/31/2018 4:26PM

Goals Summary

Manager Rating: 2-Strong Performance

Section 3 - Training

Attend Courses

Description :

Take course, working towards a PCC and CTOP designation.

Manager Comments: Scott has attended several state and regional meetings, and has received the PCC and CTOP designations.

Created By : Kenneth Maun

05/31/2018 4:27PM

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: 3-Exceeded

Manager Comments: He has worked at his area of responsibility, including more efficiently working on productivity. He has also worked on a cash policy paper which he had started in that direction while still with the auditor office.

Created By : Template

07/05/2018 8:51AM

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:

Created By : Template

07/05/2018 8:51AM

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: He is meeting the schedules for the reconciliations and reports for the office.

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07/05/2018 8:51AM

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:

Created By : Template

07/05/2018 8:51AM

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:

Created By : Template

07/05/2018 8:51AM

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:

Created By : Template

07/05/2018 8:51AM

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

07/05/2018 8:51AM

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: 2-Strong Performance

Manager Comments:

Created By : Template

07/05/2018 8:51AM

Competencies Summary

Manager Rating: 2-Strong Performance

Section 5 - Overall Summary

Manager Rating: 2-Strong Performance

Manager Comments:

Section 6 - eSignature Section

Attachments

No Attachments have been added to this document

Audit History

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