

CONFIDENTIAL
MUTUAL OF OMAHA COMPANIES
WRITTEN NOTICE

Date Issued: September 16, 2022

EMPLOYEE INFORMATION:

EMPLOYEE NUMBER: 96837

EMPLOYEE NAME: Nick Jacobi

JOB TITLE: Actuary

Nick, you have been made aware of the expectations for an Actuary role on several occasions to include training as well as 1:1s and coaching discussions with management.

Despite coaching efforts, you have not met performance expectations needed to be successful in your role. Specifically, you received a 'Needs Improvement' rating for 2021 Q2, Q3, and Q4 due to several concerns raised by management and stakeholders. Key themes included the following:

- Lack of stakeholder focus
- Accountability concerns regarding story writing, transparency into story progress, and story completion
- Lack of buy in to team goals and bigger picture understanding
- Lack of organization and transparency into task lists and priorities
- Perceived lack of engagement due to the need for repeat requests from leadership to execute on MAPS program team member responsibilities each iteration

These concerns were addressed in your 2021 Q4 performance review, along with coaching and recommendations to improve in each of these five categories. While some improvement occurred following this feedback, improvement has only been temporary and many of these concerns continue to persist. This is evidenced by the recurring feedback that has been provided by your stakeholders at various points throughout 2022.

Key themes of the stakeholder feedback provided throughout 2022 include a lack of communication and understanding of stakeholder needs, where stakeholders are often unaware when or what you are working on in support of their needs; lack of adequate training and documentation which is preventing others from absorbing the operational responsibilities to maintain the solutions you've built; a significant amount of repeat errors within the solutions that you deliver; perceptions that you continue to be disengaged in meetings; and a lack of follow through on planning and MAPS program responsibilities.

Nick, you must take immediate steps to improve and sustain your performance. Specifically, you need to

- Consistently and proactively seek understanding from stakeholders on their needs and provide timely responses when asked by a stakeholder about status or timing of a task
- Communicate with and train stakeholders on their operational responsibilities relating to the solutions you've built and document all of the process steps; obtain sign off upon completion from each stakeholder that their questions have been answered and they are able to absorb the operational responsibilities.
- Store current versions of each solution in a central location where all stakeholders can access the content, on a weekly basis.
- Provide reasonableness checks of your output prior to delivering the result of a task to the end user to minimize the number of new and recurring errors. Provide transparent updates and communication to end users regarding your reasonableness checks and regularly seek feedback on your assigned tasks.
- Actively listen and participate in meetings.
- Perform all necessary responsibilities required of all team members on the MAPS program regarding planning and execution of stories:
 - Prior to the beginning of an iteration, ensure all upcoming work for the iteration is documented in stories, including measurable acceptance criteria, story points, feature linking, capitalization, and due dates.
 - Prior to the beginning of an iteration, ensure stakeholder alignment regarding prioritization of stories.
 - Prior to the beginning of an iteration, provide reasonable commitments regarding what you can accomplish for that iteration.
 - During the iteration, proactively communicate any impediments to your project manager, workstream leadership and impacted stakeholders.
 - During the iteration, follow through on commitments. If a commitment is at risk, escalate as soon as possible to your project manager and workstream leadership to ask for help and receive guidance on how to proceed.

Revised 10/2018



- Prior to the end of an iteration, ensure that completed stories, tasks, and subtasks are completed to their agreed-upon requirements and closed out.

Employee is expected to comply with the Mutual of Omaha Code of Ethics and Business Conduct as well as all other enterprise or department policies, procedures, and guidelines. Should the Employee engage in the conduct set forth above, the Employee may be subject to involuntary separation.

If this or other performance or behavior concerns occur, worsen or recur, you may be subject to further disciplinary action, up to and including involuntary separation. As a general rule, two written notices will not be issued within a 12-month period regardless of whether the written notices are based upon the same or similar performance/behavior concerns.

Performance increases and/or incentive payouts may be impacted as a result of this Written Notice.

Your signature below acknowledges that you have received a copy of this Written Notice document for your records, and you understand its' content. Your signature does not necessarily imply that you agree with the content of this notice.

HR BUSINESS PARTNERS REVIEWER/ DATE: <i>Jennifer Ashmore Sr HR</i> <i>Business Partner 9-14-2022</i>	MANAGER'S SIGNATURE/DATE:  9/15/2022	EMPLOYEE ACKNOWLEDGEMENT/DATE: 
	MANAGER'S NAME PRINTED / EE # Jordan Edwards / 81733	

If you disagree with any content within this document, you may submit a written statement explaining your position or include in the employee comments section below. Any written explanation you provide will be maintained as part of your employee file, but will not change the expectations within this document.

EMPLOYEE COMMENTS: