

PERFORMANCE EVALUATION

UNIT: AFSCME MISC. A AND MPC

LAST NAME, FIRST NAME	
TITLE	
DEPARTMENT	
APPRAISAL PERIOD (START/END DATE)	

SIGNATURES

Employee signature acknowledges receipt of the Performance Evaluation. The employee has an opportunity to add comments either in Part 2 or by attaching a separate page with comments.

Employee Signature _____ Date _____

Overall Rating:

Exceeds Expectations Meets Expectations Does Not Fully Meet Expectations

Supervisor Signature _____ Date _____

(Print name)

Department Head Signature _____ Date _____

(Print name)

Original to Human Resources for filing

INSTRUCTIONS

This form is used by supervisors and employees to plan, monitor, and evaluate performance. General guidelines for completing the Performance Evaluation form are outlined below. New or promoted employees may be evaluated at six months and/or twelve months (see below). If an employee is rated Does Not Fully Meet Expectations, list specific goals for improvement and the date you expect them to be achieved in Part 2.

Consideration for Advancement within Salary Range
Following Appointment and/or Promotion (Personnel Rule 13)

6 Months or 12 Months

- Performance Evaluation
- Salary Increase Consideration

12 Months
(if applicable)

- Probationary Period Ends
- Performance Evaluation

Every 12 Months Thereafter

- Performance Evaluation
- Salary Increase Consideration

Planning

The supervisor and employee meet to evaluate the previous year's performance. The supervisor and employee also review departmental goals and objectives. Establishing clear performance goals and expectations helps avoid "surprises" and conflicts at year-end. With clear goals, the employee and supervisor both know what needs to be accomplished and can monitor the performance throughout the year.

Evaluating

Prior to meeting for the performance evaluation, two tasks will be accomplished. The employee should complete the Employee Self-Evaluation form (see Part 3 below). The employee lists the achievements and areas needing improvement for the rating period and submits it to the supervisor at least one (1) week prior to the performance evaluation meeting. The supervisor will review the employee's performance and the Self-Evaluation form.

PART 1: PERFORMANCE FACTORS

At the end of the appraisal period, the supervisor evaluates the Performance Factors (Part 1) using the Competency Ratings (4, 3 and 2) and adds the rating number in the rating box for the areas of each dimension. The rater also provides narrative comments to substantiate the ratings. The narrative is completed in the comments section of Part 1.

PART 2: OTHER ACCOMPLISHMENTS AND COMMENTS

Both the supervisor and employee may use this section to document important results achieved during the rating period or to include any comments regarding the review. Employees are encouraged to comment and respond to the review content and process.

PART 3: EMPLOYEE SELF-EVALUATION FORM

The employee completes Part 3 which includes objectives, strongest areas, areas of improvement, and identifies potential career development activities and expected results. The employee will complete and return part 3 to his/her supervisor one week prior to the scheduled performance evaluation meeting.

PART 4: OTHER PERFORMANCE FACTORS (IF APPLICABLE)

The supervisor checks the factors which **require improvement** by the employee being evaluated. A discussion about meeting the expectation(s) should occur between the employee and supervisor.

COVER PAGE:

The supervisor completes the cover page and checks an Overall Rating for the Appraisal Period. Upon completion of the Performance Evaluation, the employee, supervisor, and department head sign and date the completed evaluation. A copy of the Performance Evaluation form is given to the employee, a copy is kept for the department's records, and the original is submitted to the Human Resources Department.

Part 1: Performance Factors

Competency Ratings:

- 4 Exceeds Expectations
- 3 Meets Expectations
- 2 Does Not Fully Meet Expectations

Adaptability

Maintaining effectiveness when experiencing major changes in work tasks or the work environment; adjusting effectively to work within new work structures, processes, requirements, or cultures.

Areas:	Rating
<i>Tries to understand changes</i> – Actively seeks information about new work situations; strives to understand the rationale and implications for changes in work responsibilities or environment.	
<i>Approaches change or newness positively</i> – Treats change and new situations as opportunities for learning or growth; identifies the benefits of change; speaks positively about the change to others.	
<i>Adjusts behavior</i> – Quickly modifies behavior to deal effectively with changes in the work environment; tries new approaches appropriate for new or changed situations; does not persist with ineffective behaviors.	

Applied Learning (if applicable)

Assimilating and applying new job-related information in a timely manner.

Areas:	Rating
<i>Actively participates in learning activities</i> – takes part in needed learning activities in a way that makes the most of the learning experience (e.g., takes notes, asks questions, and does required tasks).	
<i>Quickly gains knowledge, understanding, or skill</i> – Readily absorbs and comprehends new information from formal and informal learning experiences.	
<i>Applies knowledge or skill</i> – Puts new knowledge, understanding, or skill to practical use on the job; furthers learning through trial and error.	

Building Strategic Work Relationships

Developing and using collaborative relationships to facilitate the accomplishment of work goals.

Areas:	Rating
<i>Seeks opportunities</i> – Proactively tries to build effective working relationships with others.	
<i>Clarifies the current situation</i> – Probes for and provides information to clarify situations.	
<i>Develops others' and own ideas</i> – Seeks and expands on original ideas, enhances others' ideas, and contributes own ideas about the issues at hand.	
<i>Facilitates agreement</i> – Gains agreement from partners to support ideas or take partnership-oriented action; uses sound rationale to explain value of actions.	
<i>Uses Key Principles</i> – Establishes good interpersonal relationships by helping people feel valued, appreciated, and included in discussions (enhances self-esteem, empathizes, involves, discloses, supports).	

Communication

Clearly conveying information and ideas through a variety of media to individuals or groups in a manner that engages the audience and helps them understand and retain the message.

Areas:	Rating
<i>Organizes the communication</i> —Clarifies purpose and importance; stresses major points; follows a logical sequence.	
<i>Maintains audience attention</i> —Keeps audience engaged through use of techniques such as body language and voice inflection.	
<i>Adjusts to the audience</i> —Frames message in line with audience experience, background, and expectations; uses terms, and examples that are meaningful to the audience.	
<i>Ensures understanding</i> —Seeks input; checks understanding; presents message in different ways to enhance understanding.	
<i>Comprehends communication from others</i> —Attends to messages from others; correctly interprets messages and responds appropriately.	

Customer Focus (internal or external customers)

Ensuring that the customer perspective is a driving force behind business decisions and activities; crafting and implementing service practices that meet customers' and own organization's needs.

Areas:	Rating
<i>Seeks to understand customer</i> – Actively seeks information to understand customer circumstances, problems, expectations, and needs.	
<i>Identifies customer service needs</i> – Identifies breakdowns in internal processes and systems that directly impact customer service and retention; expresses concerns to others.	
<i>Creates customer-focused practices</i> – Uses understanding of customer need to institute systems, processes, and procedures to ensure customer satisfaction and to prevent service issues from occurring; promotes customer service as a value.	
<i>Assures customer satisfaction</i> – Makes sure that customer solutions, practices, and procedures are carried out and achieve their objectives.	

Comments:

Please attach additional page(s) if needed

Planning and Organizing

Establishing courses of action for self and others to ensure that work is completed efficiently.

Areas:	Rating
Prioritizes—Identifies more critical and less critical activities and assignments; adjusts priorities when appropriate.	
Determines tasks and resources—Determines project/assignment requirements by breaking them down into tasks and identifying types of equipment, materials, and people needed.	
Schedules—Allocates appropriate amounts of time for completing own and others' work; avoids scheduling conflicts; develops timelines and milestones.	
Leverages resources—Takes advantage of available resources (individuals, processes, departments, and tools) to complete work efficiently; coordinates with internal and external partners.	
Stays focused—Uses time effectively and prevents irrelevant issues or distractions from interfering with work completion.	

Stress Tolerance

Maintaining stable performance under pressure or opposition (such as time pressure or job ambiguity); handles stress in a manner that is acceptable to others and to the organization.

Areas:	Rating
<i>Maintains focus</i> – Stays focused on work tasks and productively uses time and energy when under stress.	
<i>Maintains relationships</i> – Presents a positive disposition and maintains constructive interpersonal relationships when under stress.	
<i>Copes effectively</i> – Develops appropriate strategies as needed to alter conditions that create stress and to sustain physical and mental health.	

Technical/Professional Knowledge

Having achieved a satisfactory level of technical and professional skill or knowledge in position-related areas; keeping up with current developments and trends in areas of expertise.

Areas:	Rating
<i>Understands technical terminology and developments.</i>	
<i>Knows when and how to apply a technical skill or procedure.</i>	
<i>Performs complex tasks in area of expertise.</i>	

Work Standards

Setting high standards of performance for self and others; assuming responsibility and accountability for successfully completing assignments or tasks; self-imposing standards of excellence rather than having standards imposed.

Areas:	Rating
<i>Sets standards of excellence</i> – Establishes criteria and/or work procedures to achieve a high level of quality, productivity, or service.	
<i>Ensures high quality</i> – Dedicates required time and energy to assignments or tasks to ensure that no aspect of the work is neglected; works to overcome obstacles to completing tasks or assignments.	
<i>Takes responsibility</i> – Accepts responsibility for outcomes (positive or negative) of one's work; admits mistakes and refocuses efforts when appropriate.	
<i>Encourages others to take responsibility</i> – Provides encouragement and support to others in accepting responsibility; does not accept others' denial of responsibility without questioning.	

Part 2: Other Accomplishments and Comments

Other Accomplishments and Comments:

Areas for Development:

Supporting/Training Activities:

Development Results/Progress:

Part 3: Employee Self-Evaluation Form

Objectives:

Discuss your strongest areas and give specific examples

Discuss areas needing improvement

Identify areas for development and potential activities for professional career enhancement. List expected results.

Part 4: Other Performance Factors (if applicable)

The following are general performance factors that may be considered during the performance evaluation. The purpose is to facilitate communication between the supervisor and employee about **improving** these important aspects of the position. The supervisor should check the factors which **require improvement** by the employee being evaluated. A discussion about meeting the expectation(s) should occur between the employee and supervisor. During the next performance evaluation, the supervisor should review the factor(s) checked.

FACTOR CHECKLIST:

- Attendance and Punctuality:** Attends work regularly without excessive absences; maintains assigned work schedule.

- Care of equipment:** City equipment is properly used and cared for.

- Safety Awareness:** Practices rules of safety to protect self and others.

- Productivity:** Makes effective use of time/resources to accomplish assignments and meet deadlines.

- Professional Appearance:** Attire and grooming is appropriate for the work unit/organization.

- Professionalism:** Represents the organization in a professional manner.