

## Management Evaluation

Name:

Department:

Hire Date:

Job Title:

### Appraisal Context

Evaluation Date:

Review Period: From:

To:

Purpose of Appraisal:  Annual

Interim

Anniversary

Other

Evaluated By:

### Instructions

*PURPOSE: This employee performance appraisal and development plan will:*

- Identify skills/competencies necessary for all employees and your current position
- Ensure alignment with City/Department objectives and mission
- Assess your performance in these skills/competencies
- Evaluate your demonstrated dedication to City/Department objectives and mission
- Provide you with goals/action plans where opportunity for improvement exists
- Allow you to state any professional goals you have and set up an action plan to help you achieve them
- Promote effective communication between your supervisor and you

### Rating Definitions

**5. Exceptional** – Distinguished Performance

**4. Exceeds Standards** – Superior Performance

**3. Meets Standards** – Satisfactory Performance

**2. Requires Development** – New in Position and/or Less than Satisfactory Performance

**1. Does Not Meet Standards** – Unacceptable Performance (used for non-performance)

**Competencies**

**Score: /5.0**

**Adaptability and Resilience**

**Score: /5.0**

Adapts well to changing conditions and new community needs or expectations. Is quick to acknowledge the positive aspects of changes and events, staying open to new ideas, new technology, etc. Recognizes when changes in priorities, direction, or the pace of activities appear necessary. Shows resiliency in the face of obstacles, setbacks, or other sources of stress.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

### Addressing and Resolving Conflict

Score: /5.0

Recognizes and demonstrates a willingness to address conflict in its early stages. Communicates directly and effectively with the parties involved in a conflict, rather than talking about those parties in their absence. Helps others express differences of opinion or perspective in a constructive manner and respects differing viewpoints. Listens for both the emotional and the factual issues that contributed to the conflict. Strives to identify and implement solutions that are acceptable to all parties. Also, makes sound value decisions about which battle are worth fighting and which are not, and which conflicts require mediation.

#### Manager

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

#### Self

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Ensuring Safe Work Practices and Conditions**

**Score: /5.0**

Consistently follows all existing safety practices expected by the organization or by legislation (e.g., wears Personal Protective Equipment, adheres to policies, guidelines, and standard operating procedures). Goes beyond personal compliance by looking for any unsafe practices or conditions, making others aware of any risks involved. Personally promotes safety, encouraging fellow employees, contractors, and others to work safely.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Initiative, Personal Responsibility and Self-Management**

**Score: /5.0**

Takes initiative and accepts responsibility, often without waiting to be asked or instructed. Notices when there is work to be done and steps-up to take action when it is safe and practical to do so. Accepts responsibility when own words, actions/inactions or decisions have contributed to unsatisfactory results. Demonstrates high personal work standards and avoids excuses when he/she could have had a more favorable influence on the outcome. Shows self-awareness and personal insight about how own actions may have affected others.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Teamwork, Sharing and Transferring Knowledge**

**Score: /5.0**

Takes a broad view of the team concept that goes beyond agency or work group lines. Identifies, considers, and involves appropriate stakeholders. Values and shares knowledge and wisdom and encourages others to do the same. Briefs others in the organization about highlights of seminars, workshops and other learning events, sharing key elements to maximize the organization's return on its investment. Creates accessible and understandable documentation of core processes and procedures so that this information is available when new people move into existing jobs or roles. In short, ensures that knowledge and wisdom are not lost when a person retires (or moves on for other reasons).

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Work Planning, Execution, and Efficiency**

**Score: /5.0**

Gets things done. Whether in a leadership role or as an individual contributor, when a plan or procedure needs to be developed, creates and implements a viable plan efficiently and effectively with successful results. When there is little time to plan, and no established procedure, can still be counted on to think clearly and get things done. Demonstrates a keen awareness that public employees serve as stewards of the resources entrusted to them by citizens and other stakeholders.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Quality of Work**

**Score: /5.0**

Has established a track record of producing work that is highly accurate, demonstrates attention to detail and reflects well on the organization. Is personally committed to high quality work and encourages others to have similar standards. This differs from those who cannot be relied upon to produce high quality work, pay little attention to detail, show little pride in a job well done and/or set a poor example for co-workers or direct reports.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Quantity of Work**

Score: /5.0

Produces an amount of work that meets or exceeds job expectations. Makes sure that quality does not suffer as the quantity of work increases. Works effectively with peers and carries own share of team workload. This contrasts with those whose output level is clearly below organizational needs, those who make unacceptable tradeoffs between quantity and quality, and/or those whose output is typically below that of others when they are placed on a team.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Budgeting and Fiscal Responsibility**

**Score: /5.0**

Demonstrates fiscal responsibility and understands the fiduciary aspects of each employee's financial decisions. Develops or contributes to the budgeting process by providing accurate and reliable estimates of costs and expenditures. Negotiates favorable contract terms and prices for goods and services and follows established bidding and procurement procedures. Tracks and monitors actual expenses, comparing these to projections, keeping others informed and taking appropriate action to keep expenses in line.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
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- Not Applicable

**Self**

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- Meets Standards
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- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Building Internal and External Networks**

**Score: /5.0**

Builds, sustains and leverages networks both inside and outside the organization. Views others in the same (or similar) jobs or professions as colleagues and potential resources. Actively gives and takes in an exchange of lessons-learned, best practices and collective wisdom. Saves valuable time and other resources by not reinventing programs or approaches that have been developed and implemented elsewhere.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
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- Meets Standards
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- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Community/Public Relations**

**Score: /5.0**

Provides timely and accurate information to citizens and other stakeholders regarding events or situations that are of interest to the community. Uses appropriate discretion in sharing information and selects the most appropriate timing and method of communicating (e.g., press releases, electronic communications, press conferences, etc.). Anticipates citizen's needs for information and gets out in front of rumors and stories that may be inaccurate or distorted. Understands negative situations and misinformation can damage public confidence and effectively avoids, minimizes, and/or mitigates personal and organizational exposure.

**Manager**

- Exceptional
- Exceeds Standards
- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

**Self**

- Exceptional
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- Meets Standards
- Requires Development
- Does Not Meet Standards
- Not Applicable

Evaluator Comments:

**Decision Making**

**Score: /5.0**

Makes effective decisions over a broad range of situations. Accurately assesses the level of urgency, making quick, sound decisions when necessary. When time allows, includes more stakeholders, seeking their collective wisdom and building consensus. Considers and appropriately weighs costs, benefits and risks before selecting an alternative. Accurately anticipates the potential “ripple effects” of various alternatives and consistently makes decisions that stand the test of time.

**Manager**

- Exceptional
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- Meets Standards
- Requires Development
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- Not Applicable

**Self**

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- Not Applicable

Evaluator Comments:

**Leadership and Influence**

**Score: /5.0**

Exerts positive leadership influence and impact. Articulates a vision of what is important, needed, and possible and gains support and commitment from others to that vision. Serves as a positive model of how to act when pursuing goals and addressing citizen needs. Empowers and develops others, sharing credit and enhancing the organization's ability to sustain accomplishments over time. Actively works to develop employees to reach their goals.

**Manager**

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**Self**

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- Meets Standards
- Requires Development
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- Not Applicable

Evaluator Comments:

**Summary Score**

<b>Competencies</b>	<b>Score</b>
Adaptability and Resilience	
Addressing and Resolving Conflict	
Ensuring Safe Work Practices and Conditions	
Initiative, Personal Responsibility and Self	
Teamwork, Sharing and Transferring Knowledge	
Work Planning, Execution, and Efficiency	
Quality of Work	
Quantity of Work	
Budgeting and Fiscal Responsibility	
Building Internal and External Networks	
Community/Public Relations	
Decision Making	
Leadership and Influence	

**Summary Score**

**Score: /5.0**

### Instructions for Rating Past Goals

Evaluate past goals by assessing the accomplishments achieved in each category. Enter additional past goals (to a maximum of 20 in total).

#### Past Goals

	Goal	Accomplishment(s)
Title:		
Comment:		

**Completed:**

	Goal	Accomplishment(s)
Title:		
Comment:		

**Completed:**

	Goal	Accomplishment(s)
Title:		
Comment:		

**Completed:**

## Instructions for New Goals

Identify a minimum of two and a maximum of 20 new goals & objectives. Align employee goals to organizational and/or departmental goals.

These goals (or objectives) must be those that the employee agreed to accomplish over the coming review period.

Goals should be "**SMART**":

**S** - specific, significant, stretching

**M** - measurable, meaningful, motivational

**A** - agreed upon, attainable, achievable, acceptable, action-oriented

**R** - realistic, relevant, reasonable, rewarding, results-oriented

**T** - time-based, timely, tangible, trackable

Enter additional goals (to a maximum of 20 in total)

### New Goals

Title:	
Comment:	

Title:	
Comment:	

Title:	
Comment:	

Supervisor's Overall Comments

Employee's Overall Comments

***By signing this document, I hereby acknowledge that I have read and understood this review and have met with my manager to discuss it.***

Supervisor's Name:

Signature:

Employee's Name:

Signature: