



# Local 808

## Employee Performance Appraisal

Employee Title/Position:				
Time in Position:				
Supervisor's Name:				
Review Period:	<u>From:</u>		<u>To:</u>	
Purpose of Appraisal				
Date:				

## Employee Performance Appraisal Form

**Instructions:** Please read instructions for the proper filling out of the attached appraisal form.

### **Statement of Purpose:**

The purpose of this Performance Appraisal Reports is to establish the employee's job related performance for a specific performance period. At the beginning of this period, the supervisor and employee should have reviewed this report and developed an understanding of what type of performance will be expected of the employee. During the performance periods, communication between the employee and supervisor about the job performance should take place on a frequent basis. It is the supervisor's primary responsibility to ensure there is a clear understanding of what is expected of the employee. The information in this report should be a summary of the employee's performance during a specific time period.



## Evaluator's Instructions

1. Fill out all areas of the form completely and accurately and in a timely manner.
2. The form is broken down into two distinct parts. Carefully review the Standards of Performance (Traits) and corresponding Rating Categories (Exceptional, Excellent, Acceptable, Improvement Needed, Unacceptable) and select the appropriate performance levels.
3. First-Line supervisors shall complete Performance Appraisal reports for employees under their supervision.
4. The Director/Department Head will review all evaluations conducted by staff.
5. First-line supervisors shall arrange a face-to-face meeting to discuss the employee's appraisal. This meeting should be conducted privately, without interruptions, and allow enough time to assure that satisfactory communications has taken place.
6. If improvement is required in any areas, be sure to discuss an action plan that will help assure such improvement. This may include any additional training that is required, a schedule of periodic meetings to check progress, as well as special details about what is expected of the employee. It is recommended that supervisors put such details in writing and attach them to this report.
7. The rate must explain in writing in the "Comments Section" when performance ratings are exceptional or excellent or when the category of Improvement needed and/or unacceptable has been utilized as a category. The rater may, and is encouraged to, comment on all ratings given.

**NOTE:** A good evaluation form is not enough to accomplish the results listed above. A quality performance evaluation places significant responsibility upon the supervisor. Evaluation requires continuous observation, analysis of employee actions, and first-hand knowledge of the employee and his/her work habits. Performance evaluation is not a once-a-year activity. It must be viewed as a continuous process with frequent feedback and observation, all culminating in the formal performance review. A good evaluation process assures that there are no surprises during the formal review session.



## Employee Performance Appraisal Form

### **Overall Ratings Guide**

#### **Exceptional:**

Employee's performance often exceeds requirements of successful performance. The employee often takes on the initiative in performing additional tasks, duties and assignments. The individual overall does an outstanding job at their current duties, and identifies and proposes solutions to internal and external problems. Employee demonstrates performance beyond the expected scope of the performance evaluation factors. Work assignments are completed effectively and on time or ahead of schedule, and are of extraordinary quality.

#### **Excellent:**

The employee's work performance meets the Town's high expectations and provides quality services, demonstrating high achievement in all performance evaluation factors throughout the rating period. Performance may sometimes exceed requirements in all areas and shows potential leadership qualities. Employee may take initiative in performing in additional tasks and objectives, improving service delivery, and identifying and proposing solutions to problems. Work assignments are completed within acceptable time frames and are of high quality.

#### **Acceptable:**

The employee is performing standard work while providing basic services, which are expected and/or required, for the position. Employee could improve effectiveness by taking the initiative to perform additional tasks, and or identify and propose solutions to problems. Work assignments are completed within acceptable time frames and are of minimum acceptable quality or quantity. Usually copes with situations adequately, and may look for leadership and support for complex tasks or assignments.

#### **Improvement Needed:**

Employee's performance is below expected levels and does not meet the requires for acceptable performance. The quality of consistency is lacking in their work. Tasks or assignments may be incomplete, of poor quality or quantity, or not submitted within acceptable time frames. Improvement is required and monitoring is needed.

#### **Unacceptable:**

Employee's performance does not meet the requirements of his/her position. Employees needs to achieve significant, consistent improvement in one or more of the key job functions and attributes. Work reports are often of poor quality or quantity and are not completed within acceptable time factors. Continued perform at this level may result in separation from employment with the Town.



## INTERPERSONAL SKILLS

**Exceptional:** Elicits a positive response from both internal and external peers, and customers; demonstrates a leadership role in guiding others towards improving the Towns image; perceives others feelings and attitudes; persuasive; shows high-level leadership qualities; people respect him/her and comply readily; avoids showing prejudice.

**Excellent:** Goes beyond what is normally required to assure interpersonal relations; gets along with no difficulty; leads by example; shows leadership qualities; promotes confidence in crew and staff; motivates subordinates and/or peers; patient and courteous with all persons.

**Acceptable:** Has no real problem with management, peers, co-workers and the public, handles contacts with acceptable regard for others; something of a leader; can be relied upon to demonstrate acceptable behaviors in this category for new employees; avoids complaints.

**Improvement Needed:** Employee's behavior and interpersonal skills do not meet the requirements for acceptable performance. Additional on the job training and communication skills proficiency are need to bring these ratings to an acceptable level of performance.

**Unacceptable:** Has habits or characteristics that seem to "turn people off"; may have aggression trouble (too much or too little); complaints from superiors, fellow staff, management, peers, co-workers or the public; sometimes causes public relations problems.



## REALIABILITY

- Exceptional:** Can always be depended on to do the right thing at the right time; never any carelessness on the job; uses sound judgement in abiding by regulations, policies, procedures, safety practices; can be expected to exceed work requirements; perseveres; shows maturity.
- Excellent:** Seldom any evidence of problems; no complaints from management or the public; follows instructions and regulations well; inclined to work harder and do more than he/she has to; sticks to the job; appropriately mature.
- Acceptable:** Is on the job when he/she is supposed to be with few exceptions; does what he/she is expected to do without special supervision. Usually willing to following through on assignments given.
- Improvement Needed:** Constant supervision and follow-up is needed for the employee. There appears to be a lack of work ethic and dependability that causes more time and effort in monitoring to ensure work is performed at an acceptable level.
- Unacceptable:** Cannot be depended upon; may have more absences than others; late; has a variety of excuses for not being on the job or not following instructions; rather immatures; ignores instruction and supervision; fails to improve; personal problems; no self-motivation; does not perform at minimum level.

## ATTITUDE

- Exceptional:** Constantly self-motivated; positive influence on morale; enthusiastic; very loyal; demonstrates initiative; solicits assistance and information to improve skills.
- Excellent:** Displays job satisfaction and is motivated. Helpful to others; a willing worker; loyal; adaptive to change.
- Acceptable:** Neutral attitude; normal complaining but no real dissatisfaction; doesn't let problems interfere with reliable performance; not a morale problem.
- Improvement Needed:** Not willing to work as a team, independent and unmotivated to change. Needs enhancement in this area for internal and external contacts with the public and fellow co-workers. Needs to develop a better behavioral attitude in outwards displays.
- Unacceptable:** Dissatisfied, or acts that way; attitude liable to interfere with work; has to be coaxed or over-supervised; wants his/her own way; is difficult and resistant to



supervision; tries to exert negative influence on others; an unhappy person with a bad effect on morale; disloyal.

## **ABILITY**

**Exceptional:** Gets everything right, but in addition, shows initiative and promotional promise; tasks and assignments are completed correctly within and often above estimated times frames with zero safety or compliance issues.; can be used as the example of a model employee performing the tasks and assignments given; adjusts to new situations; demonstrates ability to not only do assigned tasks, but the tasks and assignments of others, typically at a higher pay grade.

**Excellent:** Can be expected to do the job thoroughly and well; performs various aspects of work completely, promotional potential; willing to accept additional responsibility; energetic in completing tasks; no problem with day to day work.

**Acceptable:** Little basis for either praising or criticizing his/her work; adequate learning and performance duties; may have some weaknesses in certain aspects of work, but generally productive.

**Improvement Needed:** Employee appears to lack motivation and initiative. Work often needs to be reviewed by a supervisor for deficiencies. Displays no willingness to assume additional tasks or responsibilities. Employees make little or no effort to improve productivity and job performance.

**Unacceptable:** Has difficulty getting things right; lacks initiative and needs help in many situations; poor reports, etc., careless or inattentive; performance and judgement errors even in routine assignments; works constantly has to be corrected; is not learning as he/she goes along; superiors reluctant to give him/her anything but the simplest assignments.

## **JUDGEMENT-DECISION MAKING-COMMON SENSE**

**Exceptional:** Outstanding ability to make decisions based on information given; accurately identifies type and extent of problem before making decisions; identifies all possible approaches for achieving objectives; actively seeks additional information to base decisions; evaluates alternatives and consequences of decisions made; maintains composure during complex or difficult decisions; recalls past experience to present situations.

**Excellent:** Properly assesses situations and evaluates information; willing to make decisions and be accountable for the same; can make decisions in difficult or complex situations; decisions are logical and based on sound principles; determines appropriate



actions based on processed information; maintains calm and self control in difficult situations; uses discretion effectively.

**Acceptable:** Assesses routine situations properly; decisive in accordance to amount of authority possessed; decisions are usually sound and logical; maintains calm and self-control in routine stress situations; seeks advice from supervisors where appropriate; mature, logical, timely decisions.

**Improvement Needed:** Decisions sometimes do not reflect the desired course of action appropriate for the situation. Employee has difficulty in analyzing facts in order to arrive at a sound decision. Needs improvement in ability to make proper judgement and decisions.

**Unacceptable:** Avoids making decisions; frequently seeks advice or assistance before making decisions; uses poor judgement; inaccurately processes information prior to acting; fails to consider alternative and/or consequences of decisions; has difficulty with routine tasks, unable to maintain calm in stressful situations.

## **POLICY AND PROCEDURE**

**Exceptional:** Outstanding working knowledge of department policies, procedures and regulations and encourages peers to support the same; initiates and promotes new ideas to improve procedures that positively impact department; is often sought by others for direction and guidance.

**Excellent:** Above average knowledge of department policies, procedures, and regulations; willing to incorporate new ideas or methods to improve department; consistently complies with policies and procedures; sets good example.

**Acceptable:** Has sufficient knowledge of policies, procedures, and regulations; adaptable to changes in procedures; is able to and does reference policies and directives when needed; complies with policies of the department.

**Improvement Needed:** Employee generally understands and follows instructions but often needs further explanation and guidance. Clarification is sought when complication arises and/or instructions are not fully understood. Supervision and direction is required.

**Unacceptable:** Has little knowledge of common department policies, procedures and regulations or reluctant to comply with same; unable to accurately reference policy in unfamiliar situations; makes little or no effort to expand knowledge of department regulations, practices, or policies.



## JOB KNOWLEDGE

**Exceptional:** Exceptional working knowledge of all aspects of the assigned job; well informed in all areas of work; actively seeks information and skills from others to improve job performance; often sought by others for information and guidance; aware of changes based on practice, policy or procedures. Can be used as the model employee example to new hires. Requires no supervision of duties.

**Excellent:** Above average working knowledge of all aspects of the assigned job; actively works to improve skills to enhance job performance' willing to assist others as the need arises, requires little supervision.

**Acceptable:** Has sufficient working knowledge of the aspects of the assigned job; possesses knowledge for proper job performance and use of proper equipment. Able to solve routine problems as they arise; however, seeks advice from leads when necessary; requires normal supervision in relation to experience.

**Improvement Needed:** Employee needs to increase working knowledge of the aspects of their assigned job. Improvement is necessary to effectively plan and coordinate tasks to complete job assignments. Quality and quantity of work need to improve.

**Unacceptable:** Employee lacks significant knowledge in the basics of performing the functions of the job. Requires constant supervision and reminders of how to do job tasks.

Final Ratings Summary	
Competency	Rating
Interpersonal Skills	
Reliability	
Attitude	
Ability	
Judgment – Decision Making – Common Sense	
Policy and Procedure	
Job Knowledge	
Overall Rating	



<b>Employee Instructions</b>	<b>Manager Instructions</b>
Employee should review and sign the completed performance evaluation.	Please sign and forward the completed evaluation to Human Resources

<b>Signatory Chain</b>			
<b>Employee Acknowledgment</b>	I have read this appraisal and have discussed the information with my manager. My signature does not imply agreement, only that the appraisal discussion took place and I was advised of my performance.		
<b>Supervisor Signature</b>		<b>Date</b>	
<b>Department Head Signature</b>		<b>Date</b>	
<b>Human Resources Signature</b>		<b>Date</b>	
<b>Town Manager Signature</b>		<b>Date</b>	
<b>Employee Signature</b>		<b>Date</b>	

