



Performance Evaluation Form: Manager/Supervisor

Employee Name: _____

Review Date: _____

Position: _____

Supervisor: _____

Type Performance Review:

☐ Annual Review

☐ Other _____

Review Period

From: _____

To: _____

INTRODUCTION

The performance review process is an important one. Its purpose is multi-faceted as it is designed to effectively:

- Evaluate the employee's performance over the previous performance period;
- Establish goals and objectives to be achieved over the upcoming performance year. These goals should align with and support the department's goals and priorities – and, ultimately, they should also support the achievement of the District's strategic goals and overall mission;
- Create a forum to encourage essential dialogue between the supervisor and employee;
- Prepare and encourage employee to be a high level performer by concentrating on developing his/her potential;
- Create a performance improvement plan for employee, if needed;
- Discuss and address any needs or concerns the employee may have.

Supervisor Instructions:

- Distribute the "Performance Review – Employee Input" form to employee 7 to 10 days prior to the employee's actual review. The employee's input and participation is a key component to the performance review process and it also allows the employee to have input in the establishment of their goals/objectives for the upcoming year. Once this form has been completed by the employee and returned, carefully review the information provided prior to completing this form.
- Review the employee's job description and carefully consider the priorities and essential functions of the position. Afterwards, please identify and list the top five major position responsibilities on the first page of the "Performance Dimensions" section. The employee will be directly evaluated on each of these items. NOTE: The major position responsibilities should be the same for all individuals holding the same positions.
- Review the goals/objectives established at the employee's last review and consider the employee's progress toward attainment of those goals. Additionally, give consideration to appropriate goals and objectives for the upcoming performance period.
- Complete form. Any performance evaluation resulting in an overall rating of "Exceptional Performance" or "Unsatisfactory" must be justified to and approved by the Executive Director prior to the performance review meeting with employee.
- Attach "Performance Review – Employee Input" form to document.
- Meet with employee to review performance, collaboratively establish goals and objectives for the upcoming review period and discuss any issues or concerns the employees may have. Both the employee and the supervisor should sign the form. Supervisor should provide the employee with a copy of the completed evaluation form and the original evaluation form should be forwarded to Human Resources.

Achievement of Previously Established Performance Goals/Objectives

Date Set: _____

Performance Period: _____

Name: _____

Supervisor's Name: _____

GOALS		DATE COMPLETED	RESULTS & IMPACT OF ACHIEVEMENT ~ IN WHAT WAY DOES IT SUPPORT OVERALL GCRD MISSION & GOALS? ~
1			
2			
3			
4			
5			

(attach additional sheet/s as needed)

PERFORMANCE DIMENSIONS

Under each performance dimension in this section is a set of characteristics which describe the performance area being evaluated. The description is not all inclusive nor does each bulleted descriptor necessarily apply to every position. This section is completed by the reviewing supervisor. The instructions for completion are outlined below.

Review the definitions of the overall performance ratings carefully prior to starting this section. Please indicate the level of performance or skills the employee demonstrates for each performance dimension by writing the appropriate rating abbreviation in each box. Narrative comments are strongly encouraged to document the rating for each performance dimension and are REQUIRED to justify any "EP," "NI," or "U" rating.

RATING DEFINITIONS:

EP – Exceptional Performance:

Superior performance that consistently exceeds the requirements of the position. Work is characterized by accomplishments beyond the job expectations and requirements. To support this rating, specific examples must be documented in the comments section.

EE – Exceeds Expectations:

Performance expectations are consistently met and frequently surpassed.

ME - Meets Expectations:

Performance meets major job requirements, is consistently effective and competent and achieves the results expected. Does good work in achievement of goals and/or competencies.

NI - Needs Improvement:

Performance minimally meets job expectations. Note that an employee performing at this level may not have applied all of the knowledge and skills required to achieve a higher rating OR that the employee may not have yet sufficiently developed the knowledge and skill required to meet performance expectations. Specific improvements needed should be addressed in the comment section and included in employee's goals for improvement.

U – Unsatisfactory Performance:

Performance is below job requirements. Immediate improvement is required. Specific improvement requirements must be documented in the comment section and included in the employee's goals for improvement.

N/A - Not applicable:

Performance standard not applicable to employee's position.

		Performance Rating
Performance of Major Position Responsibilities		
1		
2		
3		
4		
5		
Evaluator Comments and Justification for Rating		

Performance Rating	
Job Knowledge & Work Quality	
<p>Understands job duties and responsibilities. • Demonstrates competence in required job skills and knowledge. • Has insightful knowledge of managerial and professional practices. • Has a working knowledge of technical methods and systems needed. • Appropriately interprets and applies that knowledge to the unique requirements of the organization. • Is knowledgeable about current developments within his or her field. • Understands and stays abreast of issues and events that have an impact on the District's business operations. • Is an active member within relevant professional associations. • Works to develop and maintain a strong network of professional relationships.</p>	
Evaluator Comments and Justification for Rating	

Performance Rating	
Leadership	
<p>Demonstrates assertive initiative in perceiving and dealing with problems and opportunities. • Gains respect of colleagues and co-workers, and in particular those he/she supervises. • Shares important information with supervisors, coworkers, staff, and other stakeholders regularly and consistently. • Gains support and commitment from others. • Is effective in motivating others. • Accepts responsibility for own behavior. • Maintains a professional demeanor and sets an example for others. • Is assertive and self-confident, presents a positive outlook and is willing to devote the time and effort necessary to get the job done. • Demonstrates the initiative to learn new procedures and to accept new challenges. • Elicits and encourages new ideas, processes and procedures. • Provides leadership and support to employees. • Leads by example. • Maintains high personal and professional ethical standards. • Represents the District well.</p>	
Evaluator Comments and Justification for Rating	

Performance Rating	
Support for Organizational Goals	
<p>Demonstrates support for organizational goals and values. • Performs job duties in ways that support the District's commitment to add value to the quality of life in the communities in which we serve. • Understands the purpose, role, programs and services of the department and how they tie into the mission of the District. • Understands that the inherent collaborative nature of our work environment plays a fundamental role in the District fulfilling its mission within our community. • Maintains a "big picture" perspective and commitment as it relates to organizational success and fulfillment of strategic goals and mission. • Works collaboratively with others and cheerfully provides expertise and assistance where needed. • Delivers the highest levels of customer service for both internal and external GCRD customers. • Regularly identifies and seizes opportunities to improve the quality, efficiency and effectiveness of District services. • Observes applicable federal and state employment law, as well as internal GCRD employment policies. • Demonstrates commitment to sustaining an employment environment that is respectful for all. • Demonstrates commitment to creating and sustaining a safe, healthful work environment and proactively works to improve safety within own department or work area. • Abides by all safety and health rules, regulations and procedures. • Exercises caution and care toward safety of self and others. • Encourages staff participation in employee wellness initiatives and activities; leads by example in this regard. • Is a responsible environmental steward; considers and actively works to lessen the environmental impact of actions and decisions.</p>	
Evaluator Comments and Justification for Rating	

	Performance Rating
Initiative	
Generates innovative ideas, approaches, and solutions. • Facilitates change. • Works collaboratively to produce ideas and solutions. • Helps people to develop understanding of what needs to be done differently. • Persuades others to embrace positive change. • Fosters and encourages creative thinking. • Questions assumptions. • Demonstrates willingness to take calculated risk. • Notices trends and develops plans for opportunities or problems.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Decision Making/Judgment	
Demonstrates ability to analyze a situation, isolate and identify the problem, solution and/or opportunity. • Evaluates alternative courses of action and makes sound decisions. • Uses solid judgment and common sense in making decisions. • Makes strong decisions in a timely manner even under difficult and time-sensitive conditions. • Knows when to take action and what type of action is appropriate. • Anticipates events and responds appropriately. • Takes prompt and effective actions to address issues and reduce liabilities. • Can effectively handle critical incidents, emergencies, unexpected situations, anomalies.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Financial Stewardship	
Facilitates achievement of both programmatic and financial goals, and promotes budgetary compliance. • Observes the highest standards of impartiality, integrity and objectivity in relation to stewardship of public funds and management. • Safeguards physical assets and cash. • Takes initiative to maximize revenues, pursues new funding streams and grants. • Maximizes value for money, ensuring services are delivered in the most efficient and economical way within available resources. • Adheres to financial policy. • Monitors financial data to measure and evaluate compliance and performance. • Makes necessary choices to set a realistic budget. • Adjusts plans, programs, and management strategies to comply with budget restrictions, as appropriate.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Management of Staff	
Sets realistic expectations of staff. • Aligns performance and goals with the District's goals. • Delegates authority and responsibility appropriately • When possible, delegates tasks that challenge and motivate employees and promote employee growth. • Involves subordinates in planning. • Develops subordinates' skill and encourages growth. • Effectively and appropriately schedules work assignments of subordinates. • Establishes or uses existing procedures to monitor or to regulate processes, tasks, and/or job responsibilities. • Takes action to monitor and follow up the results of delegated assignments or projects. • Evaluates performance on an effective and timely basis. • Deals promptly and firmly with performance issues. • Applies policies and procedures equitably. • Recognizes and rewards employees for achievement. • Acknowledges and thanks employees for their contribution.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Employee Relations	
Maintains open communication with staff. • Asks for input. • Listens well to enhance understanding and quality of participation. • . Communicates goals and expectations and sets a good example in own work. • Gives ongoing feedback on performance; praises outstanding performance and corrects unsatisfactory performance. • Assists employees to overcome concerns, problems and barriers. • Expresses appreciation for all points of view. • Expresses disagreement constructively and diplomatically. • Is honest and forthright. • Builds collaborative working relationships. • Respects contrasting and diverse points of view.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Planning/Organizing	
Organizes time efficiently and plans ahead for additional resources if needed. • Maximizes the use of available resources. • Demonstrates ability to smoothly integrate changes into existing plans. • Establishes a course of action for self and/or others to accomplish a specific goal. • Is proactive, not reactive. • Maintains quality and ensures that product or service is delivered on time. • Keeps appropriate manager advised of the status of projects and work assignments. • Successfully balances the competing demands of multiple projects by setting priorities and meeting deadlines.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Interpersonal & Communication Skills	
Treats people with respect and dignity – and handles their problems in a manner that shows sensitivity to their needs and circumstances. • Demonstrates an ability to work effectively with patrons and staff. • Is cooperative in dealing with others and demonstrates strong teamwork abilities. • Treats others in a fair, consistent and impartial manner. • Remains calm under difficult and/or high- pressure situations. • Exhibits effective customer service skills. • Maintains an open and approachable manner.	
Communicates verbally in a clear, distinct and understandable manner. • Is persuasive and effective in explaining District positions, policies, procedures, programs and activities. • Listens attentively to what individuals (members of the public, patrons, Commissioners, employees, supervisors, peers) have to say and can elicit valuable information from others. • Uses correct grammar, vocabulary and sentence structure in an effective manner.	
Writes in a clear, concise and meaningful manner. • Summarizes a set of facts or ideas so that they are logical, coherent, clear, and can be understood by the reader. • When writing reports, letters and memos, uses appropriate grammar, vocabulary and sentence structure. • Writes clearly and concisely using terms and style which are easily understood by the intended reader.	
<i>Evaluator Comments and Justification for Rating</i>	

	Performance Rating
Attendance/Punctuality	
Consistently arrives to work on time and prepared to fulfill job duties. • Is dependable; no excessive absenteeism. • Follows District policies and procedures regarding leave time requests. • Ensures work responsibilities are covered when absent, and resolves scheduling problems as needed. • Arrives promptly for meetings and appointments. • Properly observes break and meal periods.	
<i>Evaluator Comments and Justification for Rating</i>	

Significant Employee Achievements or Accomplishments since last review

Employee Strengths

Areas for Improvement:

Recommended Professional Development & Training Activities for Employee:

Employee Comments and/or Concerns Which Were Addressed during Review:

Overall Performance Rating:

(choose one)

- ☐ Exceptional Performance *(wage increase percentages for all rating tiers are determined annually)*
- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory *(no wage increase)*

SIGNATURES

Employee Comments (You may make any additional comments here. Use additional sheet/s if necessary.):

My signature indicates that I have had meet with my supervisor to review and discuss my performance evaluation. It does not necessarily mean that I am in agreement with its contents. I also understand that this appraisal does not constitute an actual or implied employment contract, nor does it establish any expectation of continued employment.

Employee Signature:

Date:

I acknowledge that this performance evaluation constitutes my best judgment of the employee's job performance and is based on observation and knowledge of this employee's work.

**Reviewing Supervisor
Signature:**

Date:

Additional Manager Signature:

Date:

Goals/Performance Objectives for Upcoming Year

Date Set: _____

Performance Period: _____

Name: _____

Supervisor's Name: _____

Establishing goals should be a collaborative effort between the supervisor and employee. Keep in mind that all goals should be S.M.A.R.T.:

Specific Clear and concise statement of what will be accomplished.

Measurable Concrete, observable statement of what will be different once the objective is achieved.

Achievable Feasible (time, cost and employee capabilities) but with a degree of "stretch,"; something the employee can influence.

Relevant Clearly supportive of the department's goals and priorities – as well as in alignment with the achievement of the District's strategic goals and mission.

Time-Bound Include a specific timetable for achievement.

GOALS		SUPPORT & DEVELOPMENT NEEDED	HOW DOES GOAL ALIGN WITH & SUPPORT GCRD STRATEGIC GOALS AND OVERALL MISSION?
1			
2			
3			
4			
5			

(attach additional sheet/s as needed)

BOTH SUPERVISOR & EMPLOYEE SHOULD INITIAL GOAL SHEET TO INDICATE AGREEMENT WITH GOALS ESTABLISHED.