



PERFORMANCE AND MERIT EVALUATION
OPERATIONAL MANAGEMENT
PROFESSIONAL/TECHNICAL



EMPLOYEE INFORMATION

NAME: _____ EVALUATOR: _____

POSITION _____ HIRE DATE: _____

DEPARTMENT: _____ PERIOD RATED: _____

EVALUATION TYPE: ANNUAL ☐ OTHER (ex: probationary, 6 mos.) _____

PROFESSIONAL CRITERIA

Please rate each professional attribute of your employee by the following scale:

BELOW JOB REQUIREMENTS (0) Performance was below job requirements in one or more important areas and immediate improvement will be required. Give a brief explanation why.

ACHIEVED JOB REQUIREMENTS (1) Performance met job requirements in all important areas with extra effort evident in one or more of the following: quality, quantity, timeliness, or other important dimensions of performance.

EXCEEDED JOB REQUIREMENTS (2) Performance exceeded the requirements of the job in several important areas.

CONSISTENTLY EXCEED JOB REQUIREMENTS (3) Performance exceeded the requirements of the job in all major areas. Significant work above and beyond the responsibilities was achieved. Give a brief explanation why.

PROFESSIONAL ATTRIBUTES

KNOWLEDGE: Consider knowledge of skills, procedures, method, equipment, and materials required to do the job.

_____ (0) Inadequate job knowledge understanding of the skills, procedures, and method required for job is insufficient. (Explain Why) _____

_____ (1) Understand and effectively completes normal job routine. Needs little additional instruction.

_____ (2) Well informed. Completely understands all aspects of this job and related jobs.

_____ (3) An authority on own responsibilities. Knows why job functions are performed and how they relate with other jobs. (Explain Why) _____

PRODUCTIVITY: Consider the amount of work the individual produces during an extended period of time.

_____ (0) Works at extremely slow pace. Rarely meets deadlines. Needs to have constant follow up. (Explain Why) _____

_____ (1) Works at a steady pace. Output definitely meets requirements. Occasionally completes work ahead of deadlines.

_____ (2) Works fast. Produces more than most. Often work is completed ahead of deadlines.

_____ (3) Exceptional producer. Consistently completes work ahead of deadlines.
(Explain Why) _____

QUALITY: Consider the accuracy and thoroughness of employee's work. Assess work results in terms of rejections, errors, and overall neatness.

_____ (0) Excessive errors and mistakes. Requires constant checking and rework.
(Explain Why) _____

_____ (1) Meets standards for accuracy and neatness. Makes some mistakes, but of a tolerable level. Needs normal supervision.

_____ (2) Consistently high degree of accuracy and neatness. Work can be relied upon. Seldom needs supervision.

_____ (3) Consistently highest level of quality. Final output is virtually perfect.
(Explain Why) _____

INITIATIVE: Consider the degree to which employee is self-starter, can work with minimum supervision and seeks new and better methods to do the job.

_____ (0) Shows little initiative. Never volunteers. Must be told to do everything.
(Explain Why) _____

_____ (1) Voluntarily solves non-routine job problems when necessary. Effective worker.

_____ (2) Seeks new tasks and responsibilities. Resourceful in familiar situations. Self-starter.

_____ (3) Goes out of way to accept responsibility. Highly resourceful and constructive in new situations. Creative and independent worker.

(Explain Why) _____

COOPERATION: Consider the effectiveness of the employees in accomplishing duties by working with others (for example, peers, supervisors, and customers).

_____ (0) Frequently is hostile and uncooperative when working with others to complete an assigned task. Attitude is unacceptable.

(Explain Why) _____

_____ (1) Generally cooperative. Willing to accept suggestions and direction. Acceptable relations with others.

_____ (2) Very cooperative. Usually shows consideration of other's viewpoints. Often offers assistance. Can be counted on to help.

_____ (3) Always works effectively with others. Shows a keen insight into people. Constantly offers and always is available to help others. Continues education.

(Explain Why) _____

DEPENDABILITY: Consider the extent to which the employee can be relied upon to be available for work and to complete work properly.

- _____ (0) Frequently undependable. Often fails to deliver a complete job. Leaves routine tasks incomplete. (Explain Why) _____
- _____ (1) Dependable. Can be relied on to complete all aspects of job. Needs normal supervision.
- _____ (2) Very dependable and persistent despite possible difficulties. Completes normal work and occasional special projects with little supervision.
- _____ (3) Highly motivated and trustworthy. Can be counted on to go beyond limits of duties with little or no supervision when needed.
(Explain Why) _____

ORDERLINESS: Consider the employee's ability to organize work and the work area.

- _____ (0) Frequently disorganized with work area in disarray. Results in high degree of lost time and inefficiency. (Explain Why) _____
- _____ (1) Work is sufficiently organized to efficiently perform job.
- _____ (2) Highly organized and efficient worker.
- _____ (3) Exceptionally precise in organization of work. Has immediate access to anything needed? Extremely efficient. (Explain Why) _____

ATTENDANCE: Consider the employee's record of being at work regularly and on time.

- _____ (0) Unacceptable attendance record. Continual lateness or absences for work.
(Explain Why) _____
- _____ (1) Occasionally is absent or tardy. Reports absence or tardiness in advance.
- _____ (2) Seldom absent or tardy. Always reports absence or tardiness in advance.
- _____ (3) Excellent attendance record. Always at work and on time.
(Explain Why) _____

COMMUNICATION: Consider the employee's ability to effectively present ideas and information orally and/or in written form.

- _____ (0) Unacceptable communication skills. Does not communicate message in a timely manner. (Explain Why) _____
- _____ (1) Generally communicates effectively with coworkers, management, and clients.
- _____ (2) Effectively verbalizes thoughts to coworkers, management, and clients.
- _____ (3) Excellent communicator. Effectively expresses thoughts in verbal and written format.
(Explain Why) _____

- JUDGEMENT:** Consider the extent to which the employee makes good decisions.
- _____ (0) Frequently exercises poor judgement. (Explain Why) _____
- _____ (1) Usually exercises good judgement.
- _____ (2) Regularly exercises good judgment. Able to think quickly and logically under normal situations.
- _____ (3) Excellent judgment. Can be counted on to think quickly and logically under pressure. (Explain Why) _____

TOTAL OVERALL POINTS

OVERALL RATING DETERMINATION FOR MERIT INCREASE:

Check appropriate box on basis of total points.

- | | |
|--|--------------|
| <input type="checkbox"/> 2.0 % Exceeded Job Requirements in all major areas | 27-30 Points |
| <input type="checkbox"/> 1.5 % Exceeded Job Requirements in several important areas. | 17-26 Points |
| <input type="checkbox"/> 1.0 % Achieved Job Requirements | 9-16 Points |
| <input type="checkbox"/> 0.0 % Below Job Requirements | 0- 8 Points |
| <input checked="" type="checkbox"/> N/A none merit increase evaluation | |

SECTION 2: STRENGTHS & DEVELOPMENT NEEDS

Cite outstanding accomplishments and describe employee's specific strong points.

Describe areas where the employee must improve or training is needed.

SECTION 3: WORK PLAN FOR COMING REVIEW PERIOD (If appropriate)

- A.** List objectives or special projects (in priority) that have been assigned to the employee for the coming review period. State results or standards of performance and target dates mutually agreed upon. (Attach additional page if necessary).

- B.** Describe the action plan which will be used to achieve the objectives listed above (for example, what staff member, supervisor, or others will do and within what time frame).

SECTION 4: EMPLOYEE COMMENTS & SIGNATURES

Employee Comments:

Employee Acknowledge Receipt _____

Date ____ / ____ / ____

Employee Signature _____

(Signature does not imply agreement with contents)

Date ____ / ____ / ____

Department Director Signature _____

Date ____ / ____ / ____

City Manager Signature _____

Date ____ / ____ / ____

Created 7.20.2023