

INDEPENDENCE

Exempt Employee Evaluation Form

Cover Page/Signatures

Employee Name: _____

Employee Number: _____

Evaluator Name: _____

Evaluation Period:

From: _____ To: _____

Type of Evaluation:

____ Annual

____ Probationary

____ Other

Employee Comments:

Signatures:

Employee Date

Signature does not indicate agreement but indicates that the evaluation has been reviewed with the employee.

Evaluator Date

Department Director Date

Exempt Employee Performance Evaluation

Part I - Review of Past Evaluation Period - Narrative

Instructions: The supervisor should complete this section after reviewing the employee's self evaluation form. **You may use this form, make your comments directly on the employee's self evaluation, or use a separate sheet.** Discuss your written comments with the employee before submitting the completed evaluation.

A. **Review of Job Description**

Review the employee's job description with him/her. Be sure you share the same set of performance expectations. If any changes are needed to the job description, submit them to Personnel.

B. **Goals from Last Evaluation**

Review the goals identified on the employee's last evaluation. List them here, note whether they were accomplished, and evaluate the way in which they were accomplished.

C. **Exceptions to Goals**

Significant Accomplishments during the Period. Goals and priorities often change during the evaluation period. Note any significant professional accomplishments of the employee that were not listed in the previous year's goals. What behavior changes, new skills, and achievements can you identify?

Challenges during the Period. Note the challenges the employee faced during the review period. Were there goals that were not accomplished? How did the employee deal with challenges? How could the employee have faced challenges and problems more productively?

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Part II - Work Related Behaviors

Instructions: The supervisor will complete this form after reviewing the employee's self evaluation. If a behavioral descriptor does not apply to the employee's job (i.e., the employee is not a supervisor and the descriptor rates supervision), check "N/A." It is **REQUIRED** that you provide specific examples and comments if an employee is rated as "Below Expectations" or "Exceeds Expectations." The more specific you are, the more your employee will learn from this evaluation. List and rate any Evaluator-Defined descriptors at the end of this form. Make sure your Evaluator-Defined descriptors are work-related and objective; call Personnel if you need help developing descriptors. Discuss your written comments with the employee before submitting the completed evaluation.

	N/A	Below Exceeds	Meets Expectations		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
Communication Skills					
written materials are accurate, well constructed, and easy to understand					
sensitive to audience needs when speaking or writing; uses sensitivity and diplomacy when speaking					
demonstrates appropriate listening behaviors					
communications accurately represent City policy					
provides direct and honest responses to questions					
anticipates and addresses possible questions/concerns					
demonstrates courteous and businesslike telephone manners					
shares work-related information appropriately					
seeks first to understand, then to be understood					

	N/A	Below Exceeds	Meets		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
Professionalism					
accepts assignments, even tough or unglamorous ones, willingly					
maintains confidentiality when necessary					
does what needs to be done without being told					
maintains productivity, even under pressure					
takes responsibility for actions					
can be counted on to follow through on promises and assignments					
attends required meetings					
is prompt to appointments/meetings					
models behavior expected of others					
observes regular work hours; has good attendance					
Decision Making/Problem Solving					
seeks relevant expert advice before acting					
produces expected results; re-thinks if necessary					
recognizes problem areas; clearly defines problems					
takes responsibility for outcome of decisions					
encourages participation by those who will be impacted by a decision;					

	N/A	Below Exceeds	Meets		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
seeks partnerships with other departments/agencies					
demonstrates openness to creative/innovative solutions					
strives for win/win solutions to problems					
follows through to be sure decisions are implemented					
makes decisions which are supported by facts and consistent with policy					
Job Knowledge and Application					
is a resource person that others seek out					
sees how job related to department/City goals					
can readily and easily answer job-related questions					
attends training to keep knowledge current					
attends meetings when new procedures are presented					
recommends areas when productivity can be improved					
learns from mistakes; does not repeat the same mistakes					
Setting and Meeting Goals and Objectives					
effectively blends personal goals with organizational objectives					

	N/A	Below Exceeds	Meets		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
provides timely and meaningful progress reports on attainment of objectives					
consistently meets deadlines for agendas, status reports, budget, and other routine assignments					
establishes priorities necessary to attain objectives, putting first things first					
establishes ambitious, but realistic goals, beginning with the end in mind					
plans ahead and communicates plans to those affected					
accurately anticipates and projects costs					
achieves work program results while controlling expenditures within budget					
Customer and Employee Relations					
treats customers, peers, and subordinates with respect					
treats others' feelings and needs with sensitivity					
responds to messages promptly					
trains staff to react positively to citizen concerns					
solicits and gives attention to concerns of all community groups and individuals					

	N/A	Below Exceeds	Meets		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
promotes City activities and services					
is tolerant of others working styles					
actively contributes to team efforts/goals					
receptive and approachable in formal and informal settings					
Ability to Supervise Others	Omit this section for employees who do not supervise.				
provides staff with fair and timely performance evaluations; provides regular feedback to staff; recognizes staff accomplishments					
directs staff and resources to meet deadlines					
assists in meeting the City's affirmative action goals					
stays informed on subordinates' job assignments					
uses delegation as a means of employee development; controls and monitors delegated work					
supports educational/development opportunities for staff					
knows and correctly applies rules contained in collective bargaining agreement(s) and Employee Handbook					
addresses performance issues promptly and fairly					
is accessible to staff; encourages feedback, is a positive					

	N/A	Below Exceeds	Meets		Comments/Specific Examples REQUIRED if employee is rated "Below Expectations" or "Exceeds Expectations"
communicator					
Safety and Risk Management					
makes safety a priority (budget, training time for staff)					
promptly reports and investigates accidents, injuries, claims					
achieves work goals without sacrificing employee or citizen safety					
brings injured workers back to regular or light duty work as soon as possible; utilizes return-to-work employees from other departments when possible					
follows up on and corrects reported hazards					
holds staff accountable to safety procedures; sets a good example					
Evaluator-Defined Descriptors					

Exempt Employee Performance Evaluation

Part III - Looking to the Future - Narrative

Instructions: The supervisor should complete this section after reviewing the employee's self evaluation form. Discuss goals and career development plans with the employee before submitting the completed evaluation.

Goals for the Upcoming Review Period

What should be the employee's work emphasis for the next year? Where should s/he be in one year in terms of responsibility and job accomplishments? Does the employee have work behaviors that need to be changed? Does the employee need special training or work assignments to meet his/her career goals? How can you help the employee to be more effective?

Goals - List them here. Goals should be specific.

Objective

Resources Needed

Target Date

Training/Development Expectations - List them here.