



Administrative Staff Check-In

Employee Name:	Date of Evaluation:
Employee Title:	Type of Evaluation:
Department:	<input type="checkbox"/> Original probation
Date of Hire:	<input type="checkbox"/> Promotion probation
Date of Current Classification:	<input type="checkbox"/> Annual
Evaluation period:	<input type="checkbox"/> Special
	<input type="checkbox"/> Warning
	<input type="checkbox"/> Separation
Supervisor's name and title:	Department Head? [Y] [N]

Use this form to reflect upon your performance over the past year. This is your opportunity to think about your performance and to discuss what you like about your position and any concerns you might have.

This form guides you through evaluating and appreciating your own performance based upon the general aspects of your job, specific performance expectations previously and mutually set, and the talents and abilities that you bring to your position.

Preparation Steps

- Schedule uninterrupted time and select a quiet location to write your self-evaluation.
- Be in a positive frame of mind.
- Complete the questions listed below and put it aside for a day or two.
- Return to your self-evaluation after you have had the time to think about it; you may remember other items to add or may want to edit it.
- After you feel comfortable that you have accurately described your performance, email your completed self-evaluation to your supervisor.
- If necessary, type additional notes in a separate document.

Select Accomplishments

This is a self-assessment section. An opportunity to "toot your own horn".

Be flexible with yourself. There is nothing too small or too big to write down. **What was special or unique about the past year?**

Employee Development Goals for The Year in Review. What did you work on?

Goal	Employee Comment	Supervisor Comment
1.		
2.		
3.		
4.		
5.		

Employee Self-Assessment

For the following main section, take your time reading through what each number represents and mark that number below in each section next to the Employee Self-Assessment Rating. Your supervisor will review your rating and assign their own rating, to be reviewed together. Space is provided for your comments, but they are not required.

- A. Leadership Through Vision, Mission and Values.** Engaging in leadership by demonstrating understanding and commitment to the Town's vision, mission, and values while helping the department and organization to achieve organizational goals and objectives.
- 1.00 - Does not meet standards:** Fosters a negative work environment through criticism of Town and/or department policies and procedures; lacks vision or motivation. Fails to see the overall mission of the Town and/or department. Focuses on a narrow scope of issues. Requires regular supervision.
- 2.00 - Meets standards:** Consistently recognizes, demonstrates, and perpetuates the Town values and department goals. Strives to see the positive aspects of decisions and supports goals of the department. Maintains professional standards. Encourages others and contributes to a positive atmosphere and safe workplace; accepts feedback and takes corrective action, requiring little direction or motivation. Builds cross-departmental relationships and support.
- 3.00 - Exceeds standards:** Looks for opportunities to guide, inspire, and lead others in the perpetuation of Town and department/division goals and values. Demonstrates good decision making and manages stressful situations. Has above average interpersonal skills. Engages in coaching, counseling, or mentoring of others. Has strong relationships with other departments and regularly supports them. Demonstrates empathy.

4.00 - Distinguished: Easily identified as a leader in your work area being professional, knowledgeable, forward thinking, and positive. Encourages employee development. Confident, loyal, and dedicated to public service. Accepts responsibility and strives for improvement, is accountable and decisive. Accepts new challenges; adapts well to change. Creates systems and opportunities to allow for efficiency, growth, and achieving goals. Self-motivated and motivates others. Is someone that inspires confidence and respect of all personnel and is sought out for their guidance.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

B. Customer Service. Effectively serves internal and external customers resulting in a positive perception of our organization.

1.00 - Does Not Meet Standards: Finds excuses not to provide requested services. Impatient or discourteous with customers on occasion. Rarely goes out of their way to perform an extra effort. Performs minimum work. Unnecessary delays in providing services. Holds grudges.

2.00 - Meets standards: Routinely handles interactions with customers and others politely and respectfully. Provides timely responses and thinks of customer needs as a priority. Is approachable. Listens to what is being said.

3.00 - Exceeds standards: Quickly develops a positive approach and rapport with customers by listening and showing respect. Seeks resolution of problems. Seeks to address customer needs or inquires through active interaction with customer and follow through. Frequently exceeds service request expectations. Keeps management apprised of issues.

4.00 - Distinguished: Contributes to improving initiatives that help the department excel at customer service. Is a leader on customer service improvement across all departments. Someone who is sought out when help is needed.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

C. Teamwork. Cooperatively works with others to support the organization as a whole. Considerate of all team members and allows them to participate so the collaboration is successful and meaningful. Responsibly cares for shared equipment and work spaces.

1.00 - Does Not Meet Standards: Fails to get along with others. Patronizes other personnel or is antagonistic toward them. Insubordinate, argumentative, or sarcastic behavior toward others. Unable to work with others and is not a team player. Fails to rebuild relationships and foster growth after issues arose.

2.00 - Meets standards: Understands role within their team and organization. Gets along with others and maintains open and honest peer/superior relationships. While work is completed, may not leave a leading role on team tasks or projects to others. Reaches across departments to help and show support.

3.00 - Exceeds standards: Engages a team focused approach. Respects other team members regardless of role or position. Facilitates cooperation between employees. Able to constructively work through conflict. Provides opportunities for employees to lead and shine. Routinely helping and showing support of others.

4.00 - Distinguished: Completely at ease when contacting representatives from other departments. Takes a team approach when working with others on internal and external problems, including work with other departments. Supports the department and the Town's related initiatives. Equally comfortable in lead and subordinate roles.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

D. Problem Solving. Perceives and understands a problem, has the ability to formulate valid conclusions and to make appropriate decisions for effective problem resolution.

1.00 - Does Not Meet Standards: Acts without thought or reason. Is indecisive, does not self-start, or recognize areas for improvement. Fails to consider possible consequences. Does not recall previous solutions to similar problems and apply them to present situation. Unable to reason through a problem and come to an acceptable conclusion. Is inflexible.

2.00 - Meets standards: Able to reason through problems in routine situations and come to acceptable conclusions. Makes reasonable decisions based on information available and understands how continuous improvement contributes to a better organization. Perceives situations as they really are. Is openminded. Applies an empathetic approach.

3.00 - Exceeds standards: Considers several courses of action before acting. Engages the customer or other team members to explore possible solutions. Positively contributes to complex projects with an effective use of resources. Able to quickly reason through even the most complex situations and come up with solutions. Has excellent insight and perception of impacts on others. Anticipates problems and prepares resolutions in advance. Relates past solutions to present situations. Able to adapt to changing needs.

4.00 - Distinguished: Proactive in problem solving and decision making. Recognizes how decisions affect others, the organization, and other entities. Seeks to include others in a collaborative approach when appropriate. Effectively communicates throughout the process in order to improve the ability of the organization to resolve similar problems in the future. Works to further the Town's goals and has a cross-departmental approach to problem solving.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

E. Task and Time Management. Demonstrates the ability to set priorities, complete tasks, meet goals and deadlines, and effectively uses discretionary time.

1.00 - Does Not Meet Standards: Ignores, fails to see, or avoids activities that apply to their role. Often fails to complete tasks within the established timelines. Quality of work is below acceptable level. Rationalizes reasons for low productivity. Has little interest in the daily activities of the department. Does not properly follow-up on situations.

Shows little or no inquisitiveness. Not familiar with department policies and procedures.

2.00 - Meets standards: Productive and completes majority of work assignments within the established timelines with an acceptable level of quality and detail. Punctual and dependable. Recognizes and identifies situations or activity requiring attention. Shows inquisitiveness. Recognizes the difference between routine and priority tasks and acts accordingly. Seeks support when needed. Keeps supervisor informed of progress.

3.00 - Exceeds standards: Critical tasks are completed in advance of the deadline. Consistently very productive, efficient and delivers high quality work. Efficiently handles short notice requests. Takes initiative on projects. Thinks well on feet. Requires little or no direction but seeks support when needed. Provides team members opportunities to shine. Proactively anticipates departmental needs and helps improve the process and quality. Regularly reports out to team and supervisor.

4.00 - Distinguished: Extremely productive, efficient, and delivers very high quality of work usually in advance of deadlines. Committed to improving and increasing quality. Work ethic is a positive example to others. Mentors others in time and project management techniques. Shows confidence in networking with customers, other departments, and support agencies. Makes reporting out a priority.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

F. Communication. Demonstrates the ability to effectively communicate, both verbally and in written form, with diverse individuals and employee groups. All forms of documentation, whether presentation materials, reports, or other communication materials relative to the position are included within this competency.

1.00 - Does Not Meet Standards: Communication with others is often unclear. Does not listen to others or demonstrates poor tact. Does not understand the appropriate style of communication for the situation at hand. Uses inappropriate language and references. Leaves out critical information and fails to relay information and viewpoints to others. Communications are incomplete, confusing, inaccurate, and poorly composed.

2.00 - Meets standards: Can communicate clearly and constructively in various arenas, with customers, coworkers, other departments, and supervisors. Expresses thoughts clearly and listens well. Written communication is clear and concise with minimal errors. Reports are completed on time and accurately relay information in a logical order containing required and relevant information and town templates are used. Reaches out to others when needed. Shares information within the department and outwardly.

3.00 - Exceeds standards: Listens attentively. Is approachable and makes sure others are not surprised by information or statements. Is extremely clear and concise in all communication methods. Understands the appropriate style of communication for the situation and demonstrates tact. Reports are typically completed in advance of deadlines. Effectively relays and interprets information and viewpoints. Shows empathy. Communication is readily understood by anyone, and error free. Keeps supervisor informed. Makes a point to communicate internally and with the public.

4.00 - Distinguished: Consistently communicates in a positive and constructive way in various arenas to coworkers, supervisors, and the public. Reports are submitted in advance of deadlines. Shows outstanding ability to relay and interpret information and viewpoints. Is sought out when others need support communicating. Encourages expressions of differing views and keeps an open mind, can be relied upon to deliver a difficult message, seeks to resolve problems through effective communications. Communications are clear and easy to understand.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

G. Job Knowledge/Technical Skills. Demonstrates knowledge and application of department policies, procedures, technical skills and Job functions.

1.00 - Does Not Meet Standards: Is unfamiliar with the policies and procedures of the department and town. Frequently requires assistance completing routine tasks. Consistently seeks approval before acting. Violates policy and procedures. Uses unsafe work practices that compromise employee's safety or the safety of others.

2.00 - Meets standards: Demonstrates knowledge of applicable policies, procedures, and technical skills. Works to improve team members in skills essential to the job. Develops and executes an orderly work plan for themselves and department. Makes informed decisions to accomplish work efficiently and safely that are consistent with established policies and procedures. Recognizes deficiencies and seeks appropriate training. Performs tasks without supervision.

3.00 - Exceeds standards: Is fully versed in policies, procedures, and technical skills. Considered a resource by coworkers for the overall organization. Has demonstrated the ability to enhance or improve the efficiency, safety, or quality of procedures, practices, and systems. Looks to improve their own and others knowledgebase.

4.00 - Distinguished: Excellent working knowledge and application of policies, procedures, and technical skills. Efficiently and effortlessly accomplishes even the most technically difficult tasks and takes pride in teaching others to do the same. Does not hesitate to make policy and procedural recommendations based on observations and experience. Continuously seeks education across job specific, general, self-improvement, and leadership areas.

Employee Self-Assessment Rating:

Supervisor Rating:

Employee Comments:

Manager Comments:

Employee Development Goals for Next Year

1.
2.
3.
4.
5.

Signatures and Final Comments

The employee's signature below acknowledges that it has been reviewed by an evaluator with the employee. **If the employee disagrees with the evaluation**, comments to that end, with appropriate detail, may be written in the box below the signatures, along with relevant thoughts not fitting the above sections.

Employee Signature

Date

Evaluator Signature

Date

Second Evaluator Signature

Date

Town administrator's approval:

Signature

Date

Additional Employee Comments:

Large empty box for additional employee comments.



Employee Performance **Evaluation**

Employee Name: _____ Hire date: _____

Job title: _____ Department: _____ **Rating** period: From _____ to _____

Type of **Review**:

- ☐ Original probation
- ☐ Promotion probation
- ☐ Annual
- ☐ Special
- ☐ Warning
- ☐ Separation

The value of this evaluation process depends solely on the person making the rating and on his or her impartiality and sound judgment. A properly completed **performance evaluation** should provide a true picture of the employee's performance and clearly outline those areas in which the employee's performance has been strongest and/or weakest. The evaluation should clearly show what is expected of the employee to improve an inferior performance, and to sustain acceptable work and/or conduct.

How **raters/reviewer** should approach the evaluation

1. The **rating** should be made with great care and fairness in the interests of the employee and the Town of Warner.
2. This evaluation of the employee's performance should reflect the entire **rating** period.
3. **Rating** supervisors should have been in a position of direct supervision of the **rated** employee for at least three (3) months of the period being evaluated. If less than three months, the employee's previous supervisor should be consulted.
4. As part of the **evaluation** process, a follow-up **counseling interview** should be held between the employee and the supervisor. At a minimum, the supervisor should offer praise for a job well done; offer positive assistance in remedying any weaknesses in performance; and give the employee opportunity to express his/her feelings and thoughts in all job-related areas.
5. The **rater** should refer to the employee's job description and use sound judgment in making the rating.

Instructions on filling out the form

1. For each area below, the left-most box is worth 1 point and the right-most box worth 5 points. Check the box whose description best matches the performance of the employee.
2. Write the value of the box checked in the box labelled "points earned."
3. Write the points earned for each area in the "Tally" chart at the end, total those points, and write the total in the space provided.
4. Conduct the division indicated there to arrive at an Employee Rating ratio.

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Job Knowledge

Consider the basic knowledge of related work, techniques, and equipment for the job.

In adequate knowledge of the job and procedures. Fails to grasp anything but the most elementary concepts of the job. Needs constant supervision.	Inadequate knowledge of duties. Is slow to grasp the details. Needs considerable supervision.	Adequate knowledge of duties. Needs a normal amount of supervision.	Good knowledge of duties. Well informed. Needs little instruction.	Excellent understanding of duties. Extremely capable and requires little or no direction.
Comments:				Points earned:

Quantity of Work

Consider the amount and promptness of work completed.

Seldom completes a satisfactory amount of work. Slow worker and tends to waste time. Inadequate productivity.	Works at a slow pace. Needs continual urging and encouraging. Does just enough to get by.	Works at a steady pace. Usually produces an acceptable amount of work.	Works fast. Often exceeds requirements. Thorough and careful worker.	Consistently produces a high volume of work. Does more than expected.
Comments:				Points earned:

Initiative

Consider the ability to perform duties in a consistent and reliable manner, the willingness to take on new tasks, offer constructive suggestions, and accept responsibility.

Requires constant encouragement. Never volunteers to undertake work. Has no drive or ambition.	Dislikes responsibility and has very little drive. Lacks resourcefulness. Requires more than average encouragement.	Requires normal encouragement. Seldom seeks new tasks. Will accept responsibility when necessary. Accomplishes routine work.	Requires minimal encouragement. Occasionally seeks new tasks. Works well when given responsibility.	Self-starter that goes out of the way to accept responsibility. Very alert and constructive.
Comments:				Points earned:

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Public Contact

Consider willingness to work with the public and project a good image of Town employees.

Cannot deal with the public. Inconsiderate and projects a bad image. Receives numerous valid complaints.	Has trouble dealing with the public. Occasionally lacks common courtesy and receives some valid complaints. Sometimes rude or inconsiderate. Projects a poor image.	Usually maintains courteous, effective relations with the public. Generally pleasant and considerate. Seldom receives valid complaints but projects an acceptable image.	Good in dealing with the public. Very pleasant and tactful. Rarely receives valid complaints. Projects a good image.	Excellent in dealing with the public. Exceptionally courteous and well-mannered. No valid complaints received. Projects an excellent image.
Comments:				Points earned:

Operation of town equipment and property

Consider the concern for safe, responsible and reasonable operation or use of Town equipment or property, including requesting appropriate maintenance or repair.

Shows no concern for the proper use and maintenance of town equipment or property.	Minimal concern for town equipment or property. Often careless when using. [something about requesting maintenance?]	Shows concern for town equipment and property. Handles with some care. [Requests maintenance only if necessary.]	Handles town equipment and property with care. [Occasionally will request repair and maintenance as needed.]	Operates and maintains town equipment and property with extreme care. [Schedules repair and maintenance in a timely manner.]
Comments:	[Should this include proper storage of equipment?]			

Attendance

Consider the adherence to policies on absenteeism and tardiness

Often absent or tardy. Does not report absence or tardiness in advance. Very undependable.	Inconsistent attendance and punctuality. Seldom reports absence in advance. Not dependable.	Occasionally tardy or absent but reports in advance, in most cases.	Seldom absent or tardy. Always reports absences or tardiness in advance. Dependable.	Excellent attendance. Always at work and on time. Very dependable.
Comments:				Points earned:

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Safety

Consider the attitude toward personal safety as well as that of co-workers and citizens.

Has a poor safety record. Often violates safety rules. Has to be reminded to wear personal protective equipment and use appropriate safety devices.	Has a fair safety record. Does not always follow safety rules. Sometimes uses personal protective equipment and appropriate safety devices without being reminded.	Has an acceptable safety record. Usually observes safety rules and is rarely careless. Usually wears personal protective equipment and uses appropriate safety devices.	Has a good safety record. Alert in observing safety rules. Commonly wears personal protective equipment and uses appropriate safety devices.	Extremely conscious of safety. Exceptional safety record and is extremely alert in observing all safety rules. Always wears personal protective equipment and uses appropriate safety devices.
Comments:				Points earned:

Communication

Consider the ability to effectively communicate both verbally and in writing, with co-workers, superiors and the public.

Excessive and repetitive errors in written reports. Poor verbal communication skills.	Written reports often need thorough inspection. Frequent errors. Sometimes unable clearly to express subject matter in reports or [Instructions to public].	Written reports meet set standards with normal errors. Reasonably clear in expression.	[Speaks and writes] Above set standards. Errors are infrequent. Messages are mostly clear and easily understood. [Instructions to public are accurate and concise.]	Expresses self clearly and effectively on all subjects. Uses appropriate language for any situation.
Comments:				Points earned:

Leadership

Consider the ability to command and guide others in the accomplishment of their duties and tasks, actively to influence events and originate actions rather than accepting [direction] passively.

Fails to earn the respect and cooperation of employees. Fails adequately to lead the employees.	Lacks aggressiveness in leading employees.	Adequately supplies leadership and usually gains the respect of employees. Usually looked to for leadership.	Effectively leads employees. Aggressive and provides leadership in most situations.	Very aggressive in leading employees. Obtains cooperation of employees in all situations. Gains utmost respect from employees and leads by example.
Comments:				Points earned:

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Dependability

Consider the ability to perform duties while maintaining a high level of productivity in a reliable and consistent manner with little direct supervision.

Requires constant supervision. Lacks follow-through. Cannot be depended on [to do what?]. Does not follow instruction.	Requires more than normal supervision. Is easily distracted. Seldom follows instruction.	Requires normal supervision. Generally dependable and follows instructions.	Requires minimal supervision. Good follow-through and follows instructions.	Requires almost no or no supervision. Can always be depended on [to do what?]. Follows instructions with great accuracy.
Comments:				Points earned:

Policies and Procedures

Consider the knowledge and understanding of Town of Warner policies and procedures, as well as departmental [and applicable state] rules and regulations.

Lacks basic knowledge of Town policies. Disregards [or is ignorant of] departmental [and applicable state] rules and regulations. [If] Supervisor, rarely enforces safety rules.	Unfamiliar with many applicable Tow policies and departmental rules. Regularly commits infractions. [If] supervisor does not always enforce safety rules.	Possesses basic knowledge of Town policies, departmental [and applicable state] rules. Generally does not commit major infractions. [If] supervisor, usually enforces safety rules.	Knows applicable town policies, and departmental [and state] rules. Rarely commits infractions, and only those minor in nature. [If] supervisor, is very conscious of safety rules.	Extremely knowledgeable of Town policies and departmental [and state] rules. Strictly adheres to all rules and sets an example for others to follow. [If] supervisor, always enforces safety rules.
Comments:				Points earned:

Planning and Organizing

Consider the ability to plan and organize work.

Lacks basic planning skills [and foresight?]. Plans are extremely short-range without consideration of long-range effects. Lacks ability to organize resources or determine work methods efficiently.	Plans and organization lack thorough consideration. Sometimes overlooks long-range effect. Resource estimates are not always practical.	Plans and organizes work adequately. Resource estimates are sensibly aligned with projected workloads. Determines feasible work methods.	Plans and organizes work well. Usually anticipates likely complications and long-range effects. Projects workloads and related resource needs accurately	Extremely effective in planning and organization. Always conscious of detail and long-range effects. Exceptionally accurate in projecting workloads and resource needs.
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Comments:				Points earned:

Tally of Ratings

1. Job Knowledge	
2. Quantity of Work	
3. Quality of Work	
4. Initiative	
5. Co-worker relations and attitude	
6. Public Contact and Service	
7. Operation of & Care for Town Equipment & Property	
8. Attendance	
9. Safety	
10. Communication	
11. Leadership	
12. Dependability	
13. Policies and Procedures	
14. Planning and Organizing	
Total of rating points earned	
Total number of rating areas	
Divide points earned by number of areas	

Performance Evaluation Recommendations

Employee Strengths

1. _____
2. _____
3. _____
4. _____
5. _____

Areas Needing Improvement

1. _____
2. _____
3. _____

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Certifications

Certification by **rater**

I hereby certify that this report constitutes my best judgment of the job performance of this employee and is based on personal knowledge of his or her work. If the employee has worked under my supervision for less than three months, I certify that I have discussed the employee's performance with the previous supervisor (if available) and that the employee's performance under this supervisor is reflected in the appraisal.

Signature of Rater _____ Title _____ Date _____

[**Certification**] by Employee Rated

I hereby certify that I have received a copy of this performance evaluation and that it has been discussed with me. If I disagree with the evaluation, I will use the comments section below to detail my disagreement(s).

Signature of Employee _____ Title _____ Date _____

Eric's notes:

Yellow highlights a question about term vagueness or term consistency.

Green highlights a probably necessary insertion.

Blue highlights a question I have.

Pink highlights an area or measure that probably doesn't belong in this form.

I left out two areas for evaluation that appear on the Epping form: Productivity of [subordinate] Employees and [Subordinate] Employee evaluation and development. These are strictly applicable to supervisors.

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