



PERFORMANCE EVALUATION GOAL & DEVELOPMENT PROCEDURE

The following procedure should be followed when performing performance evaluations (mid-year and annual) and setting goals and development plans.

Job Performance Standards & Goal Setting

1. Supervisors should fill in the Job Performance Standards and/or SMART Goals (see attachment for help with developing a SMART goal) that were developed for the individual job description, making sure to list how it will be measured.

Examples:

Performance Standard: An Administrative Assistant will answer phone calls with a courteous tone of voice with the proper greeting by the 3rd ring, will attempt to answer the caller's question or will transfer the call to the appropriate party.

Goal: While snowplowing, a Streets Laborer will have no more than two incidents (per year) of striking mailboxes.

Individual Development Goals/Special Projects

2. Supervisors should work with employee on setting Individual Development Goals/Special Projects. These should be specific to the employee and may include training opportunities, Performance Improvement Plans, list of expectations, development of a specific competency, formal training, serving on a board, development of a new process, etc.

Examples:

Development Goal: Working toward degree, attending a conference, community service related to position.

Special Project: Developing a program for your department, planning an event.

**Please note that your Standards, Goals, Development Goals and Special Projects will auto-populate in both the Mid-Year and Annual Review Section of the form.*

This document will be used for the upcoming year's mid-year evaluations and annual reviews at the end of the year. This document does NOT need to be sent to HR until the form has been completed with the annual evaluation (usually in January). It should remain saved on a shared drive in the Department for use at mid-year and end-of-year evaluations.

Mid-Year Review/Comments

3. Employee should fill out the comments prior to meeting with the supervisor. Supervisor and employee will then meet to discuss the status of goals, performance standards, and development goals set previously for the year. If there is a delay in accomplishing either the goals or development plans, this meeting should include discussion on how to reprioritize in order to meet deadlines. The supervisor will then provide comments and/or an evaluation of the mid-year progress (add additional pages if necessary). The date of the evaluation should be entered and the document should continue to be housed within each department.



Annual Performance Evaluation

4. The annual evaluation should be completed for all employees (except for employees hired in December) using the following steps:

If an employee began working mid-year, you may not have any Individual Goals or Special Projects to evaluate. However, you should evaluate the employee on the Job Performance Standards or SMART Goals set for each specific job description, keeping in mind the employee is at an entry-level status and adjusting the measurement criteria accordingly.

- Employee should fill out the self-evaluation stating what was done to meet each goal and whether the goal was met. The employee may wish to add any other pertinent information clarifying goals or performance to the Additional Comments section. The Evaluation form should be emailed to the supervisor by the employee upon completion of this step.
- The supervisor should then fill out the evaluation for each goal or standard indicating whether the goal was met by the employee and also provide a rating for each goal. Please note that if an employee has failed to meet or exceed expectations for any of the annual goals, the employee's Overall Rating should be "Below Expectations," unless the supervisor can justify the reason for the employee not meeting expectations due to extenuating circumstances. The supervisor may choose to use the Additional Comments section to add any other information not covered previously in the evaluation that supports the supervisor's overall rating of the employee.
- The final step is for the supervisor and employee to meet to discuss the status of goals, performance standards, development goals and special projects. Discussion at this meeting should be about the employee's performance and whether the employee met the goal based on the previously agreed to measurements that were set for each goal (add additional pages if necessary). The supervisor should inform the employee whether or not an annual step increase is being recommended.
- The supervisor and employee should sign the form and if necessary, forward it to the department head for approval and signature.
- Completed evaluations should be sent to Human Resources.
- Goal setting and development for the following year should be done either in this meeting or in a subsequently scheduled meeting (use a new form). Supervisors should use this opportunity to discuss the career goals of their employees and how their employees can achieve those goals through succession planning, personal development, tuition reimbursement program, etc. Goals should be kept within each department for use in reviews and evaluations for the following year.

Please use the following rating system when completing employee evaluations. Be sure to provide comments to support the rating.

Above expectations:	The employee consistently performs at a significantly higher level compared to the standards established by the supervisor and the job description. Employee possesses the necessary skills to have a thorough working knowledge of responsibilities. The supervisor must provide specific examples of the employee performing above expectations to justify giving this rating.
Meets expectations:	The employee consistently performs at an acceptable level and rarely fails to complete assigned tasks. Employee is able to meet the standards established by the job description and supervisor.
*Below expectations:	The employee performs below the acceptable level and does not meet the standards established by the supervisor and job description. Employee is inconsistent and/or ineffective.
Developing/In Process	The employee is a new employee or is being coached or progressing through a performance improvement plan and will be evaluated upon completion.

*Any area in which the employee receives a rating of "Below Expectations" warrants attention. The supervisor will be responsible for developing an action plan which includes periodic reviews until the employee has reached an acceptable rating.



SMART Goal Worksheet

What is your goal? Write it down in the form of a sentence.

Is your goal SMART?

Is it Specific, Measurable, Achievable/Attainable, Relevant, Time bound??

Let's break it down and see!

Specific: What exactly will be accomplished? It should be well-defined and state what will be achieved.

Measurable: How will you know when the goal has been reached? There should be concrete criteria for measuring progress.

Achievable/Attainable: Is achieving this goal realistic with effort and commitment? Are the resources available? How realistic is the goal?

Relevant: Is this goal significant to the goals of the City and of our Department? Is it consistent with the key responsibilities of the job description?

Time bound: What is the specific date I will reach this goal?

Now, let's restate your goal as a SMART goal as you have defined it!
