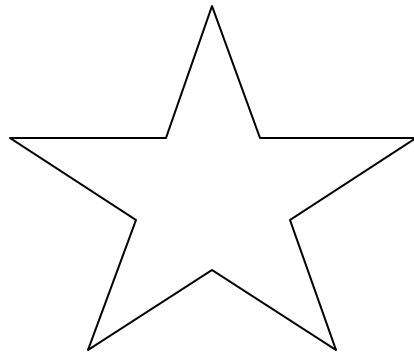


***Performance
Management
Program***



***Developing Stellar Performers
Evaluation Manual
City of Miami Beach
Human Resources Department***

Introduction

Many things influence employee performance. Among the most important of these are:

- A clear statement of expectations in terms that the employee understands;
- Ongoing training, coaching, support, or redirection as needed;
- Periodic feedback on performance; and
- “No Surprises” evaluation specifically documenting performance.

The communication of what is expected from the beginning of employment for a new employee is essential to their success. With veteran employees, the annual establishment of goals or redirection of past performance and the two-way discussion serves to reinforce how the employee is expected to contribute to the overall performance of the team, the department, and the City.

Once expectations are established, it may be necessary to provide training if an employee needs to develop a skill, knowledge, or change an attitude or approach. Coaching and support may assist a veteran employee with their professional development or difficult aspect of their work. Redirection may be needed for those employees who are not performing up to standard.

Feedback is critical to success. It allows the employee an opportunity to improve and grow professionally as well as personally. Feedback is the mirror to help the employee see the impact of his/her performance.

Continual feedback during the evaluation period leads to a “No Surprises” evaluation. The employee-supervisor discussion of the evaluation - with a focus on the accomplishments, areas for development or improvement - is a summary of the period evaluated and plans for the future.

The basis for a fair and effective performance management process is continual, factual documentation. This is for the annual evaluation, as well as the feedback sessions mentioned above. Behavioral, specific documentation of an employee’s performance, is essential for feedback sessions and as the basis for scoring the annual evaluation. It is also the key to job related evaluations which are legally defensible in the event of an appeal or court action.

The Performance Management Process

Introducing the Process

Critical to the success of the Performance Management Process (**PMP**), is preparing employees with what will be expected of them throughout the rating period. New employees may focus on learning the various aspects of their jobs with the city. Transferring or promoted employees need to focus on the changes they must make in the new position. Veteran employees may need to make improvements to their performance or adjust to changes in their current duties, or even stretch to higher achievements.

A review of the Job Description is a good place to start preparation for this introduction. ♦ In combination with the City of Miami Beach goals and departmental objectives, the Job Description provides guidelines for the expectations of a particular position.

Human Resources staff will give new employees a copy of a blank “Individual Factors” page form when they sign on with the City. When they report to their respective departments, supervisors complete the cover page and Individual Factors page of the form during the departmental introduction and orientation to the job.

Individual Performance Factors

Performance Factors are to be completed and initialed by both the employee and the supervisor at the beginning of the evaluation period.

Score Definition				
Significantly Exceeds Expectations 10 - 9	Exceeds Expectations 8 - 7	Meets Expectations 6 - 5	Needs Improvement 4 - 3	Unsatisfactory 2 - 1
Employee's Individual Performance Factors:				Mid-term Feedback on Target
Key Expectations, goals, projects, responsibilities				Yes / No

♦ To review specific Job Descriptions on the Network, the path is m:\\$cmb\humareso\jobdescr. The last file in this directory is the Index, which is an alphabetical listing of all the City Job Descriptions. For further information contact the Human Resources Recruitment Section.

The PMP form is on the City's computer network, on the M drive.*

Once selected, it should be saved on the user's PC either on a secure subdirectory of the evaluator's F drive or C drive or on a diskette. Evaluators should save the blank form then make a folder (subdirectory) and a file for each employee being evaluated.

Once the initial file is created for an employee, subsequent evaluations for that employee can be easily created.

- Review the form on the M drive to ensure you have the most current/updated version of the PMP form. The revision date will be on the cover page, lower left corner.
- Edit the dates and any other changes needed to be made to the original file.
- Be sure to resave with a new file name.

NOTE: In order to process Merit Raises and Pay for Performance increases in a timely manner, Human Resources needs to receive the completed evaluations one pay period prior to the employee's anniversary date.

* Path: m:\\$cmb\humaresd\New Evaluation\PMP2002form.xls.

For those without access to the City's network, contact Human Resources for access to the form.

Cover Page

City of Miami Beach
Performance Management Process

CMB ID _____
 Employee _____ Title _____
 Department _____
 Anniversary Date (MM/DD/YY) _____ Classified Unclassified
 Evaluator _____ Title _____
 Number of Months with Supervisor _____
 Period Covered (MM/DD/YY) _____ To _____
 Date Review discussed with Employee (MM/DD/YY) _____

Is Employee eligible or due for a Merit Increase? If yes
 Department Head Signature / Date _____

Step I: Establishing Expectations

I acknowledge that I have discussed the Performance Factors with the Employee. _____
 I acknowledge that my Supervisor has discussed the Performance Factors with me. _____
Supervisor's Initials / Date
Employee's Initials / Date

Step II: Mid-term Feedback

Employee's performance discussed at Mid-term Feedback session.
 Supervisor's Initials / Date _____
 Employee's Initials / Date _____

Step III: Completion of Review

Department Director/ACM/CM Signature / Date _____
 I have discussed this Review with the Employee. Evaluator Signature / Date: _____
 I received this Review and discussed it with my Supervisor. (On signing this Review, I acknowledge having discussed it with the Evaluator and having received a copy. I may not necessarily agree with the conclusions.)
 Employee Signature / Date: _____

Step IV: Appeal Process

Appeals must be made within ten calendar days.
 Classified Unclassified
 I cannot decide at this time whether or not to appeal, however, I have been advised of the above requirements.
 Employee Signature / Date _____

Let's start at the beginning. That is, the beginning of the rating period for each employee. The Cover page, Individual Factors page, and/or the Citywide Factors page are set up and discussed with the employee.

The Cover Page will be completed in stages:

- **Identifying information and Step I: Establishing Expectations**
These items are completed and signed by the employee and supervisor indicating that the supervisor and employee have discussed the Performance Factors at the beginning of the rating period. The objective here is to ensure the employee is clear on all goals, responsibilities, projects, and other performance issues; and understands what they can do to attain the best possible evaluation, i.e., what management is documenting or considering in making an assessment of their performance.
- **Step II: Mid-Term Feedback**
On the Cover Page the Supervisor and Employee sign, indicating that they discussed the employee's progress in meeting the expectations established at the beginning of the rating period. If the employee is not on target in any area, the employee and supervisor can establish a plan of action to improve the employee performance.**
- **Step III: Completion of Review**
Once the evaluation is completed, the supervisor and other department managers, ACM or City Manager sign as appropriate. If a merit increase is approved, the Department Director signs in this area.
- **Step IV: Appeal Process**
If an employee is entitled to an appeal of the evaluation, they may indicate their intention to appeal or not to appeal at the time of the Review Discussion. If they are undecided, they may indicate they will decide within ten calendar days.

Other key elements of the Cover Page

- **Date Review discussed with Employee (mm/dd/yy):**
This is the date from which the employee has ten calendar days to decide whether or not to appeal. It is important that this date and the date the employee signs under "Step III: Completion of Review" are the same.
- **Type of Review**
 - ◆ **Annual**
Completed evaluation is due in Human Resources within a week prior to the employee's anniversary date.
 - ◆ **Follow Up**
When Annual Evaluation is less than satisfactory, a follow up evaluation should be done 3 to 6 months later.

** See page 15 for sample Action Planning form to assist the employee with these challenges.

- ◆ **Completion of Probation**

Completed when an employee whose position is covered by the CWA contract, successfully completes their 6 month probationary period.

- ◆ **Change of Supervisor**

Should be completed when an employee's supervisor changes if they had been with that supervisor 6 months or more.

- ◆ **Other** examples include

Promotion – completed prior to employee being promoted.

Change of Classification – completed prior to change of classification becoming effective.

- **Is Employee eligible or due a Merit Increase?**

The departmental or division PMP administrator should advise the supervisor on this information prior to the Completion of the Review Step.

The Department Head indicates if it is approved or not approved at the end of this Step.

Merit Increase Designation

For an explanation of the merit system for classified employees, refer to the respective union contract for the employee's position.

Merit increases for unclassified and classified participants in the *Pay for Performance* system will be determined by the City Manager.

Is Employee eligible or due for a Merit Increase ? Yes No **If yes** Approved Not Approved

Individual Performance Factors

Employee's Individual Performance Factors:			
Key expectations, goals, projects, responsibilities	Weight	Score	Total
Process all applications for XYZ service within 2 working days of receipt.			
Respond to requests for information in a professional, customer-friendly manner.			
Complete monthly summary reports within 5 working days of the end of the month.			
Develop proficiency in using MS Excel spreadsheet applications to use in departmental statistical reports.			

Performance Factors are the standards for which employees are accountable. They reflect the individual employee's role in meeting the City and Departmental goals and objectives in light of his/her position and job description.

Specific goals, projects, responsibilities, and expected performance are indicated here. The purpose is:

- To provide a clear understanding of what is expected of the employee and the criterion by which the employee will be evaluated;
- To gain input from the employee on what key elements should be included;
- To share with the employee, at the beginning of the evaluation period, the department's goals as they relate to the employee's responsibilities.

To be effective, manageable and legal, Performance Factors are:

- Job related
- Measurable
- Stated in action or behavioral terms
- Realistic

If the Citywide Factors in the following section are adequate to describe the employees' responsibilities, they may be used in addition to or instead of specific factors listed in this section.

When there are common Individual Performance Factors relevant to several employees holding the same position, performing under similar conditions, the department should review these carefully to ensure that all employees responsible

for the same duties are being evaluated on the same elements and that the Weights are appropriate.

For example, if all Firefighter I's do essentially the same job, than the core elements in this section should be the same for all of them.

If, however, there are three Account Clerks each responsible for different projects or duties, these elements may either be written differently or have different Weights assigned.

Assigning Weights

Assigning weights to the Individual Performance Factors sets priorities and determines the relative importance of the factor. Weights range from 10 to 1, with 10 being of the highest importance.

Weights may be repeated more than once for factor of equal or similar importance.

Employee's Individual Performance Factors:			
Key expectations, goals, projects, responsibilities	Weight	Score	Total
Process all applications for XYZ service within 2 working days of receipt.	9		
Respond to requests for information in a professional, customer-friendly manner.	10		
Complete monthly summary reports within 5 working days of the end of the month.	9		
Develop proficiency in using MS Excel spreadsheet applications to use in departmental statistical reports.	7		

Citywide Performance Factors

Performance Factors are the general standards for which line employees, administrative staff, supervisors and managers are held accountable.

Management Choices

At the beginning of the rating period:

- The Evaluator may select several factors from those listed, on which to evaluate the employee;
- The department management has the discretion to use the Individual Performance Factors instead of or in addition to the Citywide Performance Factors.
- Department management may elect to pick one or more of the Citywide Factors and add them to the Individual Factors section, reducing the pages being used to evaluate the employee.
- Finally, management may elect to use the Citywide Performance Factors only to evaluate the employee.

There are three categories of factors:

- **Employee** – Line staff whether technical, professional, clerical, trades, or labor
- **Administrator** – Appointed for administrative duties with or without supervisory responsibilities
- **Supervisor, Manager, Executive** – From first line supervisor to executive, this category is for those responsible for managing the work of a crew, section, division, department or city function.

NOTE: Factors should be selected in keeping with the employee's scope of responsibility. Factors may be selected outside of an employee's category as long as it is appropriate to the employee's responsibilities.

Employee Factors – The factors in this category are most appropriate for employees who do not have supervisory, specialized technical or administrative responsibilities.

Select the factors most appropriate to level and scope of the employee's position.	
CUSTOMER SERVICE	Provides effective, efficient service to external/internal customers and represents the City in a positive manner.
TEAMWORK	Develops rapport with people at all levels. Establishes and maintains cooperative relationship and deals with others in a factual manner. Encourages continual team improvement.
PRODUCTIVITY	Produces quality work in a timely manner.
JOB KNOWLEDGE	Possesses knowledge required to accomplish job duties. Understands job via experience, education, training or observation. Strives to learn and adapt to changes and new methods.
COMMUNICATIONS	Communicates clearly (written or oral). Keeps supervisor informed.
DEPENDABILITY	Reliability in the job; includes meeting deadlines.
ATTENDANCE	(S/L, Tardies, AWOL, LWOP) Number of sick hours / incidents used [].
SAFETY	Complies with rules of safety on the job.

Administrative Factors – The factors in this category are intended for individuals with:

- ◆ Specialized technical, non-supervisory responsibilities
- ◆ Paraprofessional, non-supervisory responsibilities
- ◆ Professional

CUSTOMER SERVICE	Provides effective, efficient service to external/internal customers and represents the City in a positive manner.
TEAMWORK	Develops rapport with people at all levels. Establishes and maintains cooperative relationship and deals with others in a factual manner. Encourages continual team improvement.
PRODUCTIVITY	Produces quality work in a timely manner.
JOB KNOWLEDGE	Possesses knowledge required to accomplish job duties. Understands job via experience, education, training or observation. Strives to learn and adapt to changes and new methods.
COMMUNICATIONS	Communicates clearly (written or oral). Keeps supervisor informed.
DEPENDABILITY	Reliability in the job; includes meeting deadlines.
ATTENDANCE	(S/L, Tardies, AWOL, LWOP) Number of sick hours / incidents used [].
SAFETY	Complies with rules of safety on the job.
PROBLEM SOLVING	Identifies key issues and analyzes appropriate alternatives.
DECISION MAKING	Uses good judgement when developing and evaluating alternatives.
INNOVATION	Offers creative suggestions, develops new & unique approaches to service.
TIME MANAGEMENT	Uses available time efficiently and displays appropriate sense of urgency.

Supervisor, Manager, Executive Factors – The factors in this category are most appropriate for employees from first line supervisors to mid-level managers, division and department directors and senior level management. Select only those factors within the employee’s scope of responsibilities.

PROBLEM SOLVING	Identifies key issues and analyzes appropriate alternatives.
DECISION MAKING	Uses good judgement when developing and evaluating alternatives.
INNOVATION	Offers creative suggestions, develops new & unique approaches to service.
TIME MANAGEMENT	Uses available time efficiently and displays appropriate sense of urgency.
DIVERSITY LEADERSHIP	Supports hiring, promoting and maintaining a diverse workforce.
TEAM BUILDING	Encourages internal and cross functional teamwork. Emphasizes cooperation among employees.
EMPOWERING	Provides information, training & authority. Empowers employees to make decisions.
MANAGEMENT OF INNOVATION	Creates a climate where employees are comfortable expressing ideas.
EMPLOYEE DEVELOPMENT	Provides employees with accurate and timely feedback. Works with employees to establish development plans for professional growth.
COACHING / COUNSELING	Supports and assists employees with action plans for problem performance.
APPRAISING	Evaluates employee's performance and discusses in a constructive way. Number of employee evaluations completed this period [] due [].
PLANNING / ORGANIZING	Plans ahead, schedules work, sets realistic goals, and anticipates and prepares for assignments. Sets logical priorities.
MANAGEMENT OF SAFETY	Promotes good safety habits. Trains & ensures employees use safety procedures.
PERSUASIVENESS	Conveys ideas in a convincing way & gains support from others. Communicates clearly in writing and orally.
ECONOMIC MANAGEMENT	Develops realistic forecasts & budgets. Effectively utilizes resources. Meets forecast & budget objectives. Is responsive to business conditions.
STRATEGIC MANAGEMENT	Makes decisions & operates with attention to long range strategic direction.
PROFESSIONAL / TECHNICAL EXPERTISE	Has a clear understanding of current practices, materials, concepts and knowledge of relevant fields.

Establishing Expectations

At the beginning of the evaluation period, the evaluator meets with the employee and reviews the Individual Performance Factors and the Citywide Performance Factors.

This is especially important with new employees and should be done within the first weeks of employment.

When reviewing what will be expected, get the employees input and opinions. The employee's ideas are valuable and may prevent miscommunication. The review may serve to remind everyone of the priorities of the Department and the City, as well as the importance of a critical project. This is the time to discuss the criteria that will be used to score the evaluation at the end of the rating period.

Once the review is completed, the employee and evaluator sign and date the cover page, Step I: Establishing expectations, acknowledging that the preliminary review was conducted.

Step I: Establishing Expectations

I acknowledge that I have discussed the Performance Factors with the Employee.

Supervisor's Initials / Date

I acknowledge that my Supervisor has discussed the Performance Factors with me.

Employee's Initials / Date

Mid-Term Feedback

Determine the mid-point of the evaluation period. At the mid-term date, the evaluator should meet with the employee and review the employee's progress and accomplishments to date.

If the employee is on target, indicate **Y** (Yes), if not, indicate **N** (No).

The feedback should provide the employee with a sense of how well they are doing and what improvements, if any, they are expected to make. It may also indicate if any training or coaching is needed.

There should be no surprises in final evaluation meeting; it should serve to reiterate and reinforce the ongoing communication and feedback that have taken place throughout the rating period.

After the evaluator and the employee have completed the mid-term feedback, both initial and date the document on the cover page of the evaluation, acknowledging that the review was conducted.

Mid-term Feedback on Target Yes / No

Step II: Mid-term Feedback

Employee's performance discussed at Mid-term Feedback session.

Supervisor's Initials / Date _____

Employee's Initials / Date _____

Challenge Areas to Successful Evaluations

To help employees successfully complete their probationary periods or have their best evaluations, it may be helpful to focus their attention on performance areas that may be problematic for them. The following example may be of use in getting their commitment to work toward positive change:

Sample Memo:

TO: Employee

FROM: Employee's Supervisor

DATE: 1-1-2002

SUBJECT: CHALLENGE AREAS

To help successfully complete your (probationary period) (anniversary year), we need to focus our attention on the following areas. We will complete the action plan below to assist in improving each challenge area:

Areas of Challenge	Action Plan
1. Become an "expert" – with our phone system. Example: forwarding, transferring, intercom system, etc. Become familiar with frequently called numbers.	
2. Become very familiar with typical customer questions, example: Dept. locations, Where do I...	
3. Try to increase speed/efficiency with projects you are given. Examples : Have a plan to meet your deadlines.	
4. Work to politely give short, complete, and to the point answers, directing the customer quickly to the appropriate location.	
5. Suggest improvements in your area.	
6. Become the "expert" on the computer systems you work with.	

Supervisor Signature Date

Employee Signature Date

Preparing the Final Evaluation

Critical to an effective Performance Management Process is the ongoing observation, documentation, training, coaching and feedback between the supervisor and employee throughout the rating period. The final document is a summary of what has been done and discussed already.

It is a very effective part of the process to ask the employee for input on their accomplishments throughout the rating period, prior to writing the evaluation.

Performance Summary

Begin writing the evaluation by completing the **Performance Summary** on **Comments Section** of the form. The writing space provided on MS Excel form is an MS Word area allowing for normal word processing.

- Be specific regarding examples of performance.
- Use constructive phrasing and focus on behaviors not personalities.
- Bullet format is acceptable.
- Include recommendations for future growth or expected improvement.

Before conducting the evaluation review with the employee, the evaluator gets signatures from the succeeding levels of management in that department, including the Department Director.

Professional Development Opportunities

This page is designed for the supervisor and employee to develop a plan to assist the employee with short and long range career goals as well as opportunities to develop the knowledge, skills, and experience to meet those goals.

Professional development advisement is one of the most positive aspects of the supervisor-employee relationship. It gives the supervisor the opportunity to enable and empower the employee to grow either toward increased capacity for their current position or in preparation for career advancement. Consider the process on page 29 in the Appendix. This discussion may be held during the annual evaluation meeting or when setting goals for the following year.

Scoring

When preparing the final evaluation using the form prepared in MS Excel, the computation of the scores is done automatically by the program. To manually compute the scores for either the Individual Performance Factors or the Citywide Performance Factors follow the steps below:

- 1) Add all of the numbers in the “W” or weights column. This gives you Total Weights.
- 2) Multiply the Total Weights by .10. This allows the scores to remain on a scale of 0 to 100.
- 3) Multiply each row: **Weight * Score = Total** for a total for each factor.
- 4) Add up the Totals column.
- 5) Divide the Sum of the Totals column by the amount from Step2 for the Overall Score for the section.
- 6) When computing both the Individual Performance Factors and the Citywide Performance Factors, add the two scores together and divide by 2 on the Calculations page.

Mid-Term Feedback on Target			
W	S	Total	Yes/No
Y	08	8	01
Y	08	8	01
Y	07	7	01
Y	04	4	01
Y	03	3	01
Y	02	2	01
Y	01	1	01
			01
			01
			01
			01
			01
Totals:		012	08
City Wide Overall Score:		13.11	08

Score Definitions

For single factors the scale is as follows:

10 – 9	Significantly Exceeds expectations
8	Exceeds Expectations
7 – 5	Meets Expectations
4 – 3	Needs Improvement
2 – 1	Unsatisfactory

Overall Scores:

100 - 90
89.9 - 80
79.9 - 50
49.9 - 30
29.9 - 0

Score Definition				
Significantly Exceeds Expectations	Exceeds Expectation	Meets Expectations	Needs Improvement	Unsatisfactory
10 - 9	8	7 - 5	4 - 3	2 - 1

Overall Score				
Significantly Exceeds Expectations	Exceeds Expectations	Meets Expectations	Needs Improvement	Unsatisfactory
100 - 90	89.9 - 80	79.9 - 50	49.9 - 30	29.9 - 1

Calculations

Calculations

Individual Performance Total		City Wide Performance Total		Total		Final Score
0.00	+	0.00		= 0	/ 2'	= 0

**The total is only divided by 2 when both Individual Performance Factors and City Wide Performance Factors are scored.

Performance Rating Scale				
100 - 90	89.9 - 80	79.9 - 50	49.9 - 30	29.9-1
Significantly Exceeds Expectations	Exceeds Expectations	Meets Expectations	Improvement Needed	Unsatisfactory

The MS Excel program automatically computes calculations. As discussed on page 15, the Final Score is the sum of the Individual Performance total and the Citywide Performance total divided by 2. If only one of these sections is completed, the total for that section is the final score.

Calculations / 2

Individual Performance Total		City Wide Performance Total		Total		Final Score
76.67	+	83.60		= 160.2666667	/ 2	= 80.13333

Calculations / 1

Individual Performance Total		City Wide Performance Total		Total		Final Score
76.67	+	0.00		= 76.6666667		= 76.66667

Employee Comments

Employees may write a response to the evaluation in the space below or attach a separate page. This response must be signed and dated by the employee.

Appendix

Performance Management Process



CMB ID # _____
 Employee _____ Title _____
 Department _____
 Anniversary Date (MM/DD/YY) _____
 Evaluator _____ Title _____
 Number of Months with Supervisor _____
 Period Covered (MM/DD/YY) _____ To _____
 Date Review discussed with Employee (MM/DD/YY) _____

Classified Unclassified

Review Type
 Annual Follow Up Completion of Probation Change of Supervisor Other

Is Employee eligible for a Merit Increase ? Yes No or N.A. **If yes** Approved Not Approved

Department Head Signature / Date _____

Step I: Establishing Expectations

I acknowledge that I have discussed the Performance Factors with the Employee. _____
 Supervisor's Initials / Date

I acknowledge that my Supervisor has discussed the Performance Factors with me. _____
 Employee's Initials / Date

Step II: Mid-term Feedback

Employee's performance discussed at Mid-term Feedback session.
 Supervisor's Initials / Date _____
 Employee's Initials / Date _____

Step III: Completion of Review

Department Director/ACM/CM Signature / Date _____

I have discussed this Review with the Employee. Evaluator Signature / Date: _____

I received this Review and discussed it with my Supervisor. (On signing this Review, I acknowledge having discussed it with the Evaluator and having received a copy. I may not necessarily agree with the conclusions.)

Employee Signature / Date: _____

Step IV: Appeal Process

Appeals must be made within ten calendar days and are only for ratings below 5 or overall below 50.

Classified Unclassified

I wish to Appeal I do not wish to appeal I cannot decide at this time whether or not to appeal, however, I have been advised of the above requirements.

Employee Signature / Date _____

Individual Performance Factors

Performance Factors are to be completed and initialed by both the employee and the supervisor at the beginning of the evaluation period.

Score Definition						
Significantly Exceeds Expectations	Exceeds Expectations	Meets Expectations	Needs Improvement	Unsatisfactory		
10-9	8	7-5	4-3	2-1		
Employee's Individual Performance Factors: Key expectations, goals, projects, responsibilities					Mid-term Feedback on Target Yes / No	
Totals:				0	0.00	0.00
Individual Overall Score:		0				

City Wide Performance Factors

Performance Factors are to be completed and initialed by both the employee and the supervisor at the beginning of the evaluation period.

Score Definition					
Significantly Exceeds Expectations 10 - 9	Exceeds Expectations 8	Meets Expectations 7 - 5	Needs Improvement 4 - 3	Unsatisfactory 2 - 1	
Select the factors most appropriate to level and scope of the employee's position.					Mid-term Feedback on Target
				W	S
				Total	Yes / No
ADMINISTRATIVE FACTORS					
EMPLOYEE FACTORS					
CUSTOMER SERVICE	Provides effective, efficient service to external/internal customers and represents the City in a positive manner.	10			
TEAMWORK	Develops rapport with people at all levels. Establishes and maintains cooperative relationship and deals with others in a factual manner. Encourages continual team improvement.	10			
PRODUCTIVITY	Produces quality work in a timely manner.	10			
JOB KNOWLEDGE	Possesses knowledge required to accomplish job duties. Understands job via experience, education, training or observation. Strives to learn and adapt to changes and new methods.	9			
COMMUNICATIONS	Communicates clearly (written or oral). Keeps supervisor informed.	9			
DEPENDABILITY	Reliability in the job; includes meeting deadlines.	9			
ATTENDANCE	(S/L, Tardies, AWOL, LWOP) Number of sick hours / incidents used [].	9			
SAFETY	Complies with rules of safety on the job.	9			
PROBLEM SOLVING	Identifies key issues and analyzes appropriate alternatives.	9			
DECISION MAKING	Uses good judgement when developing and evaluating alternatives.	9			
INNOVATION	Offers creative suggestions, develops new & unique approaches to service.	9			
TIME MANAGEMENT	Uses available time efficiently and displays appropriate sense of urgency.	9			
DIVERSITY LEADERSHIP	Supports hiring, promoting and maintaining a diverse workforce.	10			
TEAM BUILDING	Encourages internal and cross functional teamwork. Emphasizes cooperation among employees.	10			
EMPOWERING	Provides information, training & authority. Empowers employees to make decisions.	10			
MANAGEMENT OF INNOVATION	Creates a climate where employees are comfortable expressing ideas.	10			
EMPLOYEE DEVELOPMENT	Provides employees with accurate and timely feedback. Works with employees to establish development plans for professional growth.	10			
COACHING / COUNSELING	Supports and assists employees with action plans for problem performance.	10			
APPRAISING	Evaluates employee's performance and discusses in a constructive way. Number of employee evaluations completed this period [] due [].	10			
PLANNING / ORGANIZING	Plans ahead, schedules work, sets realistic goals, and anticipates and prepares for assignments. Sets logical priorities.	9			
MANAGEMENT OF SAFETY	Promotes good safety habits. Trains & ensures employees use safety procedures.	9			
PERSUASIVENESS	Conveys ideas in a convincing way & gains support from others. Communicates clearly in writing and orally.	9			
ECONOMIC MANAGEMENT	Develops realistic forecasts & budgets. Effectively utilizes resources. Meets forecast & budget objectives. Is responsive to business conditions.	9			
STRATEGIC MANAGEMENT	Makes decisions & operates with attention to long range strategic direction.	9			
PROFESSIONAL / TECHNICAL EXPERTISE	Has a clear understanding of current practices, materials, concepts and knowledge of relevant fields.	10			
Totals:				0	0


City Wide Overall Score: 0.00

Supervisor, Manager & Executive Factors

Performance Summary

In order to type your comments double-Click in the box below.

Type all text within the box in the blue area.

A large, empty rectangular box with a thin black border, centered on the page. It is intended for the user to type their performance summary comments. The box is currently blank.

Calculations

				Professional Development Opportunities				
--	--	--	--	---	--	--	--	--

Individual Performance Total	0.00	+	City Wide Performance Total	0.00	=	Total	0	/	Final Score	0
-------------------------------------	------	---	------------------------------------	------	---	--------------	---	---	--------------------	---

**The total is only divided by 2 when both Individual Performance Factors and City Wide Performance Factors are scored.

Career/Professional Goals:

Performance Rating Scale				
100 - 90	89.9 - 80	79.9 - 50	49.9 - 30	29.9-1
Significantly Exceeds Expectations	Exceeds Expectations	Meets Expectations	Needs Improvement	Unsatisfactory

II. Competencies needed to be developed to meet these goals:
Employee Comments
 Employees may write a response to the evaluation in the space below or attach a separate page.
 This response must be signed and dated by the employee.

III. Training/Education/Experience needed to develop these competencies

IV. Action Plan and Time Table for Development Activities

Employee Signature and Date

Deleted: _____ Page Break _____

TO: (Employee)

FROM: (Your Supervisor)

DATE: (1-1-2002)

SUBJECT: CHALLENGE AREAS

To help successfully complete your (probationary period) (anniversary year), we need to focus our attention on the following areas. We will complete the action plan below to assist in improving each point.

Areas of Challenge	Action Plan

Supervisor Signature Date

Employee Signature Date

Steps for Completing the PMP in EXCEL

➤ Startup

1. Start **EXCEL**
2. Select the **FILE** pull down menu
3. Select **OPEN**
4. For those on the Net Work
 - a. Select the **M Drive**
 - b. Select **\$CMB**
 - c. Select **HUMARESO**
 - d. Select **New Evaluation**
 - e. Select **PMP2002form.xls**
 - f. Click **OPEN**
5. For those not on the Network:
 - a. Select **A Drive** and insert a floppy disk with PMP file on it.
 - b. Select **PMP2002form.xls**
 - c. Click **OPEN**

Always save the File under a different file name before using it to protect the Original.

➤ File Save as...

1. Select the **FILE** pulls down menu
2. Select **SAVE AS**
3. For those on the Network:
 - a. Select the **F or C Drive**
 - b. Select or create a Directory to save the PMP Files
 - c. Type in the file name
4. For those not on the Network:
 - a. Select **A Drive** and insert a floppy disk; or select **C Drive**
 - b. Select or Create a Directory to save the PMP Files
 - c. Type in the file name

Recommendation: Use employee's initials and the year of the end of the evaluation period, i.e. **fsca01.xls**.

Professional Development Opportunities Advisement Process

- I. Review the City/Departments' organizational chart for career ideas with the employee.
- II. Discuss goals and possible ideas for action with employee.
- III. Prior to meeting with employee:
 - A. Send Professional Development Opportunities page of the PMP (page 4) to be reviewed and completed by employee and brought to Advisement Meeting.
 - B. Recommend that employee gets input from, technical experts, supervisors and managers in areas they are interested in.
- IV. Advisement Meeting
 - A. Discuss employee's career goals in light of City/Department structure.
 - B. Outline possible career paths.
 - C. Discuss internal and external training and education available to employee as well as other development resources and how to research resource availability, for example:
 1. Human Resources
 2. Internet information
 3. College/University counseling services
 4. Adult/Technical Education Resources
- V. Develop action plan: establish goals and time frames.