POLICIES & PROCEDURES COMMITTEE MEETING
PAYNESVILE CITY HALL
JANUARY 17, 2013
6:00 P.M.

AGENDA

I. CALL TO ORDER

II. CONSENT AGENDA
   A. Minutes (page 1)

III. NEW BUSINESS
   A. Election of Officers (page 6)
   B. Meeting Schedule (page 7)
   C. When The City Administrator Is Absent (page 8)
   D. City Administrator Review

IV. OLD BUSINESS
   A. Performance Evaluation Form (page 10)
   B. Employee Performance Appraisals - **CLOSED SESSION PURSUANT TO MINNESOTA STATUTE SECTION 13D.05, SUBDIVISION 3** – To evaluate the performance of individuals who are subject to Policies & Procedures Committee authority:
      1. Liquor Store Clerk – 6 month review
      2. 3 Liquor Store Clerks – annual review
      3. Accounting Specialist
      4. Administrative Assistant

V. NEXT MEETING
   A. Select a day in May of 2013

VI. INFORMATIONAL

VII. ADJOURN

Please contact Renee Eckerly at 320-243-3714 ext. 227 or at reneeE@paynesvillemn.com if you can't attend the meeting.

Members: Gene Beavers, Donavan Mayer & Renee Eckerly

This agenda has been prepared to provide information regarding an upcoming meeting of the Policies & Procedures Committee. This document does not claim to be complete and is subject to change.

BARRIER FREE: All Policies & Procedures Committee meetings are accessible to the handicapped. Attempts will be made to accommodate any other individual need for special services. Please contact City Hall (320) 243-3714 early, so necessary arrangements can be made.

REQUEST FOR COMMITTEE/COUNCIL ACTION

COMMITTEE/COUNCIL NAME: Policies & Procedures Committee

Committee/Council Meeting Date: January 17, 2013

Agenda Section: Consent

Originating Department: Administration

Item Number: II-A

ITEM DESCRIPTION: Minutes

Prepared by: Staff

COMMENTS:

Please review the minutes from the October 29, 2012 Policies & Procedures Committee meeting.

ADMINISTRATOR COMMENTS:

COMMITTEE/COUNCIL ACTION:

Motion to approve the minutes from the October 29, 2012 Policies & Procedures Committee meeting.

MINUTES
POLICIES & PROCEDURES COMMITTEE MEETING

OCTOBER 29, 2012

Gene Beavers called the meeting to order at 6:00 p.m. Other members present were Jeff Bertram and Renee Eckerly, City Administrator. Bill Ludwig was also in attendance.

Motion was made by Bertram to approve the minutes from the September 20, 2012 Policies & Procedures Committee meeting with noted changes. Seconded by Beavers and unanimously carried.

INTERVIEWS FOR LIQUOR STORE CLERKS

The Committee interviewed 4 applicants.

Motion was made by Bertram to hire Justin Toombs and April Mathies as Liquor Store Clerks as the rate of $8.15 per hour and create an eligibility list of Leah Knapp and Tina Phillipp pending successful background checks and recommend such to the City Council. Seconded by Beavers and unanimously carried.

EMPLOYEE PERFORMANCE APPRAISALS

Beavers recessed the open meeting at 7:15 p.m. and opened the closed meeting. The Committee reviewed performance reviews for:

1. Accounting Specialist

Beavers closed the closed meeting at 7:17 p.m. and re-opened the regular meeting.

Motion was made by Bertram to approve the Employee Performance Appraisal. Seconded by Beavers and unanimously carried.

NEXT MEETING

The next meeting will be November 15, 2012 at 6:00 p.m.

There being no further business, the meeting was adjourned at 7:18 p.m.

MINUTES
POLICIES & PROCEDURES COMMITTEE MEETING

MARCH 29, 2012

Gene Beavers called the meeting to order at 6:10 p.m. Other members present were Jeff Bertram and Renee Eckerly. Also present was Mark Eckerly.

> **Motion was made by Bertram to approve the minutes from the January 30, 2012 Policies & Procedures Committee meeting. Seconded by Beavers and unanimously carried.**

POLICE DEPARTMENT – DISCUSS CHIEF & SERGEANT POSITION

Eckerly reviewed the documents (MAPE contract, estimated cost for 8 hr a week from the Stearns County Sheriff's department, Sergeant wage information from League, Paynesville Township options, and current union wage scale for officers) in the agenda. The Committee reviewed the 2011 Wage/Benefit worksheet for total package amounts and reviewed union contracts for placement and procedures. The Committee wanted to know the PERA amount for Grade15/Step 5 of the MAPE salary scale. Eckerly will research this and email it out. The Committee discussed the option of a Sergeants position. A complete discussion will be at the City Council working session. The Committee also requested Eckerly to research and contact the Board of Mediation regarding how placement is determined and examples of job description for a Sergeant.

NON-UNION LIQUOR STORE CLERK & CABLE OPERATOR WAGE SCALE

Eckerly reviewed the changes to the wage scale for the non-union Liquor Store Clerk I position and the non–union Cable Coordinator position. Both scales were increased from Steps 3 – 7 three cents due to a rounding error.

> **Motion was made by Bertram to accept the wage scales for the non-union Liquor Store Clerk I position and non–union Cable Coordinator position and recommend such to the City Council. Seconded by Beavers and unanimously carried.**

EXAMINE THE CITY ADMINISTRATOR PERFORMANCE EVALUATION PROCESS

This item was tabled until mid-summer or early Fall. The Committee discussed whether it is the measuring scale or the results.

REVIEW PERFORMANCE EVALUATION FORM

This item was tabled until mid-summer or early Fall. There is a need to look at how this change will affect all employees. Eckerly is to contact the League of MN Cities to see if they have any evaluation tools and bring back them to the Committee.

EMPLOYEE PERFORMANCE APPRAISALS

Beavers recessed the open meeting at 6:40 p.m. and opened the closed meeting.

The Committee reviewed 1 performance review:

1. Liquor Store Clerk

Beavers re-opened the regular meeting and closed the closed meeting at 6:49 p.m.

Motion was made by Bertram to approve step increases for Deanne Nolen, Liquor Store Clerk from Grade 1 Step 2 ($8.33) to Grade 1, Step 3 ($8.52) effective 4/7/12 (Non-Union Grade Scale) and recommend such to the City Council. Seconded by Beavers and unanimously carried.

There being no further business, the meeting was adjourned at 6:50 p.m.

REQUEST FOR COMMITTEE/COUNCIL ACTION

COMMITTEE/COUNCIL NAME: Policies & Procedures Committee

Committee/Council Meeting Date: January 17, 2013

Agenda Section: New Business

Originating Department: Administration

Item Number: III - A

ITEM DESCRIPTION: Election of Officers

Prepared by: Staff

COMMENTS:

Nominations for Chairperson.

Nominations for Vice-Chairperson.

Nominations for Secretary.

ADMINISTRATOR COMMENTS:

COMMITTEE/COUNCIL ACTION:

Motion to elect _____ as Chairperson.

Motion to elect _____ as Vice Chairperson.

Motion to elect _____ as Secretary.

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REQUEST FOR COMMITTEE/COUNCIL ACTION

COMMITTEE/COUNCIL NAME: Policies & Procedures Committee

Committee/Council Meeting Date: January 17, 2013

Agenda Section: New Business

Originating Department: Administration

Item Number: III - B

ITEM DESCRIPTION: Meeting Schedule

Prepared by: Staff

COMMENTS:

Annually, each year every Committee sets their annual meeting schedule. The Personnel Committee currently meets on an as needed basis.

ADMINISTRATOR COMMENTS:

COMMITTEE/COUNCIL ACTION:

Motion to set the Policies & Procedures Committee meetings for _____.

REQUEST FOR COMMITTEE/COUNCIL ACTION

COMMITTEE/COUNCIL NAME: Policies & Procedures Committee

Committee/Council Meeting Date: January 17, 2013

Agenda Section: New Business

Originating Department: Administration

Item Number: III - C

ITEM DESCRIPTION: When The City Administrator Is Absent

Prepared by: Staff

COMMENTS:

Please review the attached policy revisions. The original policy was approved by Policies & Procedures on July 6, 2009 and then by the City Council on July 22, 2009.

ADMINISTRATOR COMMENTS:

COMMITTEE/COUNCIL ACTION:

Motion to _____.

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When the City Administrator is Not in the Office

All Staff should continue to work as if the City Administrator is in the office. Staff should verbally inform the caller that the City Administrator is not in the office before directing the telephone call to the City Administrators voicemail if possible. When the caller needs immediate attention find out what the situation is direct the caller to the correct department. Public Works Director or Police Chief will determine when to call the City Administrator at the cell number of 320-248-2128 and forward the message.

Staff is to contact Ron Mergen, Public Works Director, or Paul Wegner, Police Chief for resolution to their or residents questions. If Ron/Paul feels uncomfortable handling the situation, he should contact the Mayor.

Deleted: Kent Kortlever

Deleted: Kent

When the City Administrator is absent the Administrative Assistant shall open, date stamp and process her mail unless the envelope is stamped confidential, human resources, St. Louis, MRO Inc, or from MAPE or AFSCME. If the City Administrator is on vacation, these documents should be given to Ron Mergen to decide whether they should be opened by him, or the Mayor. Anything that needs immediate attention should be processed and the City Administrator should be informed of the situation as soon as she returns to work.

Deleted: Chris Lundgren

The daily backups will be reviewed and tapes swapped out by Belinda Ludwig, Accounting Specialist Sr. and in her absence Jennifer Welling, Administrative Assistant.

Deleted: Chris Lundgren

Deleted: Belinda Ludwig

The daily balancing of the city hall POS cash drawer will be done by Belinda Ludwig and in her absence Sandy Wall.

Deleted: Chris Lundgren

The morning pickup of the bank deposit and change order from the Liquor Store will be done by Sandy Wall and in her absence the Police Department.

Deleted: Chris Lundgren

Important telephone contact numbers:
Computer/Network - Bennett Office Technologies – 320-235-6425 press 2 for Service explain the situation and work with Paul or Kyle

Deleted: Tim

Telephone System - Talk to Jennifer Welling before calling; she maybe able to assist - ~~Lakedale~~ Windstream Telephone – Keith – 320-274-1177
Financial System software – Talk to Belinda Ludwig; she maybe able to assist – Tyler Technologies – 1-800-646-2633

Deleted: /Chris Lundgren

Deleted: they

Liquor Store software – RITE – Customer Support 320-230-2282
Liquor Store credit card – Heartland Payment System – Talk to Bill Ludwig, Liquor Store Manager or Belinda Ludwig, Accounting Specialist Senior before calling so she is aware of the problem. You will also need the merchant ID when calling in 888-963-3600.

REQUEST FOR COMMITTEE/COUNCIL ACTION

COMMITTEE/COUNCIL NAME: Policies & Procedures Committee

Committee/Council Meeting Date: January 17, 2013

Agenda Section: Old Business

Originating Department: Administration

Item Number: IV - A

ITEM DESCRIPTION: Performance Evaluation Form

Prepared by: Staff

COMMENTS:

Discuss changes to the current Performance Evaluation Form which was recently approved on April 12, 2011. The following samples are attached from the March meeting:

- 360 Degree Feedback
- City of Bemidji
- City of Kimball
- Paynesville Area Health Care System

ADMINISTRATOR COMMENTS:

COMMITTEE/COUNCIL ACTION:

Motion to _____.

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MINUTES
POLICIES & PROCEDURES COMMITTEE MEETING

MARCH 29, 2012

Gene Beavers called the meeting to order at 6:10 p.m. Other members present were Jeff Bertram and Renee Eckerly. Also present was Mark Eckerly.

> **Motion was made by Bertram to approve the minutes from the January 30, 2012 Policies & Procedures Committee meeting. Seconded by Beavers and unanimously carried.**

POLICE DEPARTMENT – DISCUSS CHIEF & SERGEANT POSITION

Eckerly reviewed the documents (MAPE contract, estimated cost for 8 hr a week from the Stearns County Sheriff's department, Sergeant wage information from League, Paynesville Township options, and current union wage scale for officers) in the agenda. The Committee reviewed the 2011 Wage/Benefit worksheet for total package amounts and reviewed union contracts for placement and procedures. The Committee wanted to know the PERA amount for Grade15/Step 5 of the MAPE salary scale. Eckerly will research this and email it out. The Committee discussed the option of a Sergeants position. A complete discussion will be at the City Council working session. The Committee also requested Eckerly to research and contact the Board of Mediation regarding how placement is determined and examples of job description for a Sergeant.

NON-UNION LIQUOR STORE CLERK & CABLE OPERATOR WAGE SCALE

Eckerly reviewed the changes to the wage scale for the non-union Liquor Store Clerk I position and the non–union Cable Coordinator position. Both scales were increased from Steps 3 – 7 three cents due to a rounding error.

> **Motion was made by Bertram to accept the wage scales for the non-union Liquor Store Clerk I position and non–union Cable Coordinator position and recommend such to the City Council. Seconded by Beavers and unanimously carried.**

EXAMINE THE CITY ADMINISTRATOR PERFORMANCE EVALUATION PROCESS

This item was tabled until mid-summer or early Fall. The Committee discussed whether it is the measuring scale or the results.

REVIEW PERFORMANCE EVALUATION FORM

This item was tabled until mid-summer or early Fall. There is a need to look at how this change will affect all employees. Eckerly is to contact the League of MN Cities to see if they have any evaluation tools and bring back them to the Committee.

EMPLOYEE PERFORMANCE APPRAISALS

Beavers recessed the open meeting at 6:40 p.m. and opened the closed meeting.

The Committee reviewed 1 performance review:

1. Liquor Store Clerk

Beavers re-opened the regular meeting and closed the closed meeting at 6:49 p.m.

Motion was made by Bertram to approve step increases for Deanne Nolen, Liquor Store Clerk from Grade 1 Step 2 ($8.33) to Grade 1, Step 3 ($8.52) effective 4/7/12 (Non-Union Grade Scale) and recommend such to the City Council. Seconded by Beavers and unanimously carried.

There being no further business, the meeting was adjourned at 6:50 p.m.

MINUTES
POLICIES & PROCEDURES COMMITTEE

APRIL 12, 2011

Chairperson Gene Beavers called the meeting to order at 6:05 p.m. Other members present were Jeff Bertram and Renee Eckerly.

> **Motion was made by Bertram to approve the minutes from the February 28, 2011 Policies & Procedures Committee meeting. Seconded by Eckerly and unanimously carried.**

NEXT MEETING

The next meeting will be May 23, 2011 at 6:00 p.m.

LIQUOR ORDINANCE

The Committee requested clarification on the last sentence on page 5, of subd. 2.

> **Motion was made by Beavers to approve Ordinance No. 134, 2nd Series amending Chapter 5 entitled Alcoholic Beverages, Licensing & Regulation and recommend such to the City Council with clarifications. Seconded by Bertram and unanimously carried.**

> **Motion was made by Eckerly to approve the Official Summary of Ordinance No. 134, 2nd Series An Ordinance Regulating The Possession, Sale & Consumption Of Intoxicating And 3.2 Percent Malt Liquor Within The City of Paynesville, Minnesota and recommend such to the City Council. Seconded by Beavers and unanimously carried.**

EVALUATION FORM

The Committee reviewed the new forms compared to the current form with wording changes suggested from Pamela Steckman.

> **Motion was made by Bertram to approve the revised Performance Evaluation form and recommend such to the City Council. Seconded by Beavers and unanimously carried.**

DISCIPLINE NOTIFICATION SYSTEM

The Committee reviewed the Discipline Notification System and Eckerly will put it in place and discuss it with the Department Heads.

EMPLOYEE PERFORMANCE APPRAISALS

Beavers recessed the open meeting at 6:20 p.m. and opened the closed meeting.

The Committee reviewed the performance appraisals for two Liquor Store Clerks.

Beavers re-opened the regular meeting and closed the closed meeting at 6:25 p.m.

> **Motion was made by Eckerly to accept the reviews of two Liquor Store Clerks; including the step increase from Grade 1, Step 1 ($8.15) to Grade 1, Step 2 ($8.33) for Deanne Nolen and recommend such to the City Council. Seconded by Beavers and unanimously carried.**

There being no further business, the meeting was adjourned at 6:27 p.m.

CITY OF PAYNESVILLE
PERFORMANCE EVALUATION

The Employee Performance Evaluation is designed to

Generate two-way communication between the employee and supervisor

Review employee performance in relation to City/Department goals and objectives

Recognize achievements, accomplishments and contributions of employees

Identify areas for employee training and development

Provide a basis fro planning future performance

Rating Identification

5	-	*Outstanding*	-	Performance is exceptional in all areas and is recognizable as being far superior to others.
4	-	*Very Good*	-	Results clearly exceed most position requirements. Performance is of high quality and is achieved on a consistent basis.
3	-	*Good*	-	Competent and dependable level of performance. Meets performance standards of the job.
2	-	*Improvement Needed*	-	Performance is deficient in certain areas. Improvement is necessary.
1	-	*Unsatisfactory*	-	Results are generally unacceptable and require immediate improvement.

Employee Name _____ Title _____

Reviewed by _____ Date _____

Appraisal Period _____ To: _____

Wage Eligibility _____

GENERAL FACTORS	RATING 5/4/3/2/1	COMMENTS
1. **Job Knowledge** The understanding of concepts, procedures and tasks relevant to the job; the degree to which job knowledge contributes to outcomes and expectations.	_____	
2. **Quality** The accuracy, thoroughness, and acceptability of work performed.	_____	
3. **Productivity** The quality and efficiency of work produced in a specified period of time.	_____	
4. **Reliability** The extent to which an employee can be relied upon regarding task completion and follow up.	_____	
5. **Availability** The extent to which an employee is punctual, observes prescribed work break/meal periods and the overall attendance record.	_____	

6. **Independence** _____

The extent of work performed with little or no supervision.

7. **Creativity** _____

The extent to which an employee proposes ideas, finds new and better ways of doing things.

8. **Initiative** _____

The extent to which an employee seeks out new assignments and opportunities to improve performance; identifies ways to meet or exceed organizational goals and needs.

9. **Adherence to Policy** _____

The extent to which an employee follows safety and conduct rules, other regulations, and observes good housekeeping practices.

10. **Interpersonal Relationships** _____

The willingness and demonstrated ability to cooperate, work, and communicate with co-workers, supervisors, and/or outside contacts.

11. **Behavior Pattern** _____

The stability, courtesy, personal appearance and judgment demonstrated on the job.

SUPERVISORY AND MANAGEMENT ONLY

12. **Leadership** _____

The ability to positively influence individual or team commitment to achieving goals; ability to provide a plan for the future.

13. **Fiscal Management** _____

The ability to budget and anticipate financial needs; meet cost objectives; respond to budget problems.

14. **Supervising Employees** _____

The ability to plan and coordinate the work of others to assure quality of work unit services; establishing standards, delegating, monitoring, coaching for employee development, encouraging creativity and appropriate risk taking.

PREVIOUS PERIOD'S OBJECTIVES

RESULTS OF CURRENT APPRAISAL

FUTURE PERFORMANCE OBJECTIVES

EMPLOYEES COMMENTS (OPTIONAL)

I have read and have had an opportunity to discuss the contents of this evaluation with my supervisor. I understand that I have the right to prepare and submit comments on any area of this evaluation. I understand comments should be presented within two weeks to the city administrator and that they will be attached to this evaluation form when received. My signature does not necessarily mean that I agree with this rating.

Evaluator Signature Date	Employee Signature Date
Policies & Procedure Com. Signature Date	City Administrator Signature Date

360 Degree Feedback Solutions

focal 360

What is 360 Degree Feedback?

What is 360 Degree Feedback?

360 Degree Feedback is a system or process in which employees receive confidential, anonymous feedback from the people who work around them. This typically includes the employee's manager, peers, and direct reports. A mixture of about eight to twelve people fill out an anonymous online feedback form that asks questions covering a broad range of workplace competencies. The feedback forms include questions that are measured on a rating scale and also ask raters to provide written comments. The person receiving feedback also fills out a self-rating survey that includes the same survey questions that others receive in their forms.

Managers and leaders within organizations use 360 feedback surveys to get a better understanding of their strengths and weaknesses. The 360 feedback system automatically tabulates the results and presents them in a format that helps the feedback recipient create a development plan. Individual responses are always combined with responses from other people in the same rater category (e.g. peer, direct report) in order to preserve anonymity and to give the employee a clear picture of his/her greatest overall strengths and weaknesses.

360 Feedback can also be a useful development tool for people who are not in a management role. Strictly speaking, a "non-manager" 360 assessment is not measuring feedback from 360 degrees since there are no direct reports, but the same principles still apply. 360 Feedback for non-managers is useful to help people be more effective in their current roles, and also to help them understand what areas they should focus on if they want to move into a management role.

How is 360 Degree Feedback Used?

Companies typically use a 360 feedback system in one of two ways:

1. 360 Feedback as a Development Tool to help employees recognize strengths and weaknesses and become more effective

When done properly, 360 is highly effective as a development tool. The feedback process gives people an opportunity to provide anonymous feedback to a coworker that they might otherwise be uncomfortable giving. Feedback recipients gain insight into how others perceive them and have an opportunity to adjust behaviors and develop skills that will enable them to excel at their jobs.

2. 360 Feedback as a Performance Appraisal Tool to measure employee performance

Using a 360 degree feedback system for Performance Appraisal is a common practice, but not always a good idea. It is difficult to properly structure a 360 feedback process that creates an atmosphere of trust when you use 360 evaluations to measure performance. Moreover, 360 feedback focuses on behaviors and competencies more than on basic skills, job requirements, and performance objectives. These things are most appropriately addressed by an employee and his/her manager as part of an annual review and performance appraisal process. It is certainly possible and can be beneficial to incorporate 360 feedback into a larger performance management process, but only with clear communication on how the 360 feedback will be used.

What a 360 Feedback Survey Measures:

- 360 feedback measures behaviors and competencies
- 360 assessments provide feedback on how others perceive an employee
- 360 feedback addresses skills such as listening, planning, and goal-setting
- A 360 evaluation focuses on subjective areas such as teamwork, character, and leadership effectiveness

What 360 Feedback Surveys do not assess:

- 360 feedback is not a way to measure employee performance objectives (MBOs)
- 360 feedback is not a way to determine whether an employee is meeting basic job requirements
- 360 feedback is not focused on basic technical or job-specific skills
- 360 feedback should not be used to measure strictly objective things such as attendance, sales quotas, etc.

Return to list of 360 Degree Feedback Article Topics

Article Topics

- **What is 360 Degree Feedback?**

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- 360 Assessment Design
- Deployment and Logistics
- Delivering 360 Feedback
- Developing a 360 Degree Feedback Strategy - Part 1: Competency Models
- Developing a 360 Feedback Strategy - Part 2: Survey Items
- Sample 360 Degree Feedback Surveys
- 10 Mistakes to Avoid when Conducting 360 Feedback

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360 Degree Feedback Surveys CustomInsight.com Employee Engagement Survey

info@CustomInsight.com 750 Arrowhead Dr. Carson City, NV 89706 650-577-9604

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Renee Eckerly

From: Jean Thompson [jean.thompson@ci.moorhead.mn.us]
Sent: Thursday, March 15, 2012 9:15 AM
To: HR/Personnel services
Subject: RE: [lmc-hr] 360 Degreee Evaluation Forms
Attachments: Annual Performance Evaluation Template - 2011.doc; Blank Form - J. Thompson.doc

Hi Sheila - We started with 360 reviews back in the early 2000's with our City Manager and also Directors. I will attach the last copy for our City Manager and also a Director review (this one is a bit older). When we first started this process, it worked well however as years have been going by, it seems like people do not have the interest in filling them out. We have found that everyone is extremely honest since it is annoymous unlike our regular development reviews where almost everyone is a "star". We have received very valuable feedback from the 360 reviews and I believe they have helped all of us that are evaluated by them.

Jean

From: Sheila Dubs [mailto:Sheila.Dubs@marshallmn.com]
Sent: Thursday, March 15, 2012 8:54 AM
To: HR/Personnel services
Subject: [lmc-hr] 360 Degreee Evaluation Forms

If anyone has a 360 degree Evaluation Form to share, or can point me in the direction of a recommended form to purchase, I would greatly appreciate it.
Also, if you have utilized this evaluation process with a City Administrator/City Manager position in your City, I would appreciate any words of advice.

Thank you!

Sheila Dubs
Human Resource Coordinator

City of Marshall
344 West Main Street | Marshall, MN 56258
507-537-6790 | FAX 507-537-6830 | www.marshallmn.com

You are currently subscribed to lmc-hr as: jean.thompson@ci.moorhead.mn.us
To unsubscribe send a blank email to leave-204045-5535.7ec69dd44416c46745f6edd947b470cd@listserv.lmc.org
---
You are currently subscribed to lmc-hr as: ReneeE@paynesvillemn.com
To unsubscribe send a blank email to leave-204049-38793.6a3c021c3468863faf3f09d860cf9108@listserv.lmc.org

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MOORHEAD
MINNESOTA

City Manager Annual Performance Evaluation
August 2011

Summary

The City Manager's evaluation consists of an annual evaluation by the Mayor and City Council, as provided in the City Manager's employment agreement. The purpose of the evaluation process is to maintain a strong Council-Manager team by ensuring open and productive communication on an annual basis in a formal way, and on an ongoing basis more informally. During the formal annual review process, there is an opportunity to identify areas of satisfaction and items needing change or improvement as identified by the Mayor and Council. The review presents an opportunity for the Mayor and Council to add value to the City Manager's professional work and relationship with the Mayor and Council.

Jean Thompson, Human Resources Director, is the facilitator for this process, and will gather the Mayor and Council's input and compile responses into a comprehensive format for the review discussion. This year, the review discussion is scheduled for September 12, 2011. This is conducted in an Executive Session during the regularly scheduled City Council meeting.

Attached is a form designed to gather Mayor and Council input. This review covers the period of September 1, 2010 to September 1, 2011. Please utilize this form to rate the City Manager in the areas provided. You may also provide narrative comments and/or additional information to be considered that is not captured in the form. Please submit all information to Jean Thompson, Human Resources Director, in the enclosed, postage-paid envelope by Thursday, September 8, 2011.

Thank you for your assistance with the Annual Performance Evaluation for the City Manager.

Jean Thompson
Human Resources Director

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City Manager Annual Performance Evaluation

Rating Period: September 1, 2010 to September 1, 2011

Rating Criteria

For each performance criteria, please use the following rating scale:

E – Exceeds your expectations.
M – Meets your expectations.
N – Needs Improvement or attention.

Communication Skills:

_____ Verbal Communication Skills – Good command of oral expression; expresses ideas clearly and concisely; comprehends ideas expressed by others; able to explain and understand difficult and complex subjects.

_____ Written Communication Skills – Good command of written expression; expresses ideas clearly and concisely; comprehends ideas expressed by others; able to explain and understand difficult and complex subjects through written media.

_____ Presentation Skills – Is able to prepare and present quality presentations using a variety of tools and media; presentations are effective and visually appealing.

Interpersonal Skills/Relationship with Mayor and Council:

_____ Ability to relate well to others; makes people feel at ease, even in difficult situations.

_____ Exhibits a collaborative, calm demeanor in interactions with the elected body and City staff; fosters communication and working relationships.

_____ Maintains effective communications with the public and is responsive to citizen requests and inquiries.

_____ Is able to gain the trust and confidence of the public; fosters contact and cooperation among citizens and community organizations.

_____ Understands and embraces the concept of interagency cooperation when appropriate.

_____ Has the ability to utilize appropriate media for communication – TV, radio, newspaper, group interaction, individual meetings.

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_____Skilled in negotiation techniques in a variety of scenarios, such as employee collective bargaining, policy discussions, public, and interagency.

_____Is forthright, honest, and professional in relationships with the public, Mayor and Council, and City employees.

Leadership:

_____ Supports and manages in accordance with identified Mayor and Council policy directions and guidelines.

_____ Provides City staff with effective direction and management; encourages high performance and quality work in staff efforts.

_____ Uses sound judgment in decision making; seeks out all relevant and necessary data, makes decisions in a timely manner.

_____ Stays current with new management practices, techniques, professional development, and technology.

_____ Consistently supports streamlining and economizing City services where practical and appropriate.

_____ State of Emergency events (e.g. spring floods) are handled in an effective and professional manner.

Planning:

_____ Exhibits a forward-thinking approach, both in the short- and long-term.

_____ Utilizes effective project management techniques.

_____ Sets objectives for performance and manages toward those objectives.

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_____ Completes projects agreed upon by the Mayor and Council within the given time frame.

Management – Finance & Business:

_____ Directs and utilizes City resources effectively.

_____ Actively pursues ways to increase value to the City.

_____ Plans and organizes the presentation of the Annual Operating & Capital Budget.

_____ Plans and organizes maintenance of facilities, buildings, and equipment through the Annual Capital Improvement Budget process.

Management – Staff:

_____ Able to delegate authority, granting proper authority at the proper times and is a good judge of when and when not to delegate.

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_____ Utilizes a positive approach to direct efforts of staff.

_____ Encourages and rewards initiative.

_____ Addresses employee issues promptly and effectively, utilizing progressive discipline.

_____ Promotes cohesive teamwork within the Executive Leadership Team and encourages effective relationships between senior staff and the Mayor and City Council.

Comments:

In a brief narrative, please describe:

What are you most pleased with in the City Manager's performance during the rating period?

30

What areas would you like to see improvement in? Please provide specific suggestions on how the City Manager may make improvements to better serve the elected body.

Completed by Council Member: _____

Date: _____

As a reminder, please submit all information to Jean Thompson, Human Resources Director, by Thursday, September 8, 2011.

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City of Bemidji
Performance Evaluation for Probationary Period

Bemidji — First City On The Mississippi

Employee Name: _____

Department: _____

Review Period: Probationary Period

Overall Rating

☐ Below Expectations
☐ Meets Expectations
☐ Exceeds Expectations

General Comments: _____

Recommendation: ☐ Continue employment ☐ Terminate employment ☐ Extend Probationary Period

Employee Signature _____ Date _____ Supervisor Signature _____ Date _____

KNOWLEDGE OF JOB	**Technical** Knows skills, procedures, techniques, codes, safety regulations, etc., needed to complete job tasks.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Conceptual Knows how the job fits into department and how job affects others.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Interpersonal Knows how to work with others, knows who to work with, and what information to share.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

QUALITY OF WORK	**Clear and in Good Order** Legible, organized, according to required or planned steps.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Complete/Error Free Correct amounts, calculations, spelling, measurements, etc., and has no missing or misleading parts of information.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Meets Quality Goals/ Standards Goals or end results are met and the standards for quality are met.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

QUANTITY OF WORK	**Technical** Completes work assigned, produces expected amount of work.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Conceptual Shows that work assignments are understood; knows when goals are met.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Interpersonal Knows when to work with others to successfully complete an assignment.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

DEPENDABILITY	**Reliable in Doing Work** Completes work according to procedures, guidelines, and goals given.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Watched Over or Directed Takes responsibility for completing work	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Deadlines/Schedules Works towards set deadlines and schedules.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

ATTENDANCE	**Absences** Does not abuse excused absences. Unexcused absences are rare and explanations credible.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Tardiness or Leaving Early Includes late to work, meetings, and appointments or leaving work early.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Work Station Stays at work place as defined by the job.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

INITIATIVE & ATTITUDE	**Anticipates Work** Knows what needs to be done next to do the job.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Starts Work Begins work without waiting to be told to start.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Attitude Shows interest in work; does not complain about work.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

JUDGEMENT	**Routine** Follows correct procedures.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Non-Routine Chooses correct procedure to follow. Identifies alternatives to solve problems and chooses best alternative.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Consequences Looks at pros, cons, and impact of decisions before making a decision.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

COOPERATION	**Instruction/Direction** Listens to instructions and tries to do the work as directed.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Unpleasant Tasks Willingness to do tasks that are difficult, cause problems, or are uninteresting.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Effort Tries hard to get the job done.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

RELATIONSHIPS	**Supervisor** Shares information and keeps supervisor informed of work status.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Co-Workers Shares information, works together, and gets along with others in work unit.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Customers/Public Shares information, does work for, and provides good service to customers/public.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

COORDINATION OF WORK	**Plans/Organizes** Estimates time job will take and schedules work realistically.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Work Redo Avoids having to repeat a procedure or redo a task to get the job done.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Use of Resources Uses supplies, materials, equipment, and/or work-time efficiently.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

SAFETY—ENVIRONMENT	**Work Place Environment** Keeps work area clean and organized and maintains appropriate appearance for the job.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Safety and Security Rules and Procedures Follows safety rules/procedures for use of machinery, safety equipment, and personal security.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Responsibility for Co-Workers Takes responsibility for the safety of others.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

City of Bemidji
Performance Evaluation for Non-Management Staff

Bemidji — First City On The Mississippi

Employee Name: _____

Department: _____

Review Period: _____

Overall Rating

- ☐ Below Expectations
- ☐ Meets Expectations
- ☐ Exceeds Expectations

General Comments: _____

_____

_____

Employee Signature _____ Date _____ Supervisor Signature _____ Date _____

KNOWLEDGE OF JOB	**Technical** Knows skills, procedures, techniques, codes, safety regulations, etc., needed to complete job tasks.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
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	Responsibility for Co-Workers Takes responsibility for the safety of others.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

City of Bemidji
Performance Evaluation for Managers/Supervisors

Bemidji — First City On The Mississippi

Employee Name: _____

Department: _____

Review Period: _____

Overall Rating

- ☐ Below Expectations
- ☐ Meets Expectations
- ☐ Exceeds Expectations

General Comments: _____

Employee Signature _____ Date _____ Supervisor Signature _____ Date _____

PLANNING	**Setting Goals/Objectives** Sets goals with end results that can be met within limits of resources, time, and safety.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Strategy/Tactics Prepares, processes, and schedules the personnel, materials, and equipment required to meet goals.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Communicating Plans Notifies employees, supervisors, public, and other departments involved in plans.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

ORGANIZING	**Human Resources** Assigns and arranges work schedules so staffing is available when needed.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Financial Budgets funds for tasks and ensures that funds are set aside for use as planned.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Equipment/Materials Ensures that equipment and material needed to do the job are available.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

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STAFFING	**Selecting** Hires or recommends for hire.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Developing Identifies and provides training—both on-the-job and formal—to employees.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Matching Makes assignments to employees who are best suited to accomplish jobs/tasks.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

LEADING	**Guiding/Influencing** Communicates goals and expectations; sets a good example in own work.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Confidence Building Gives feedback on satisfactory performance and praises outstanding performance.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Disciplining Employees Gives feedback on unsatisfactory performance and follows discipline policy.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

CONTROLLING	**Human Resources** Reviews the use of staffing and follows up to be sure use is efficient and effective.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Financial Reviews use of funds to ensure they are used as budgeted.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Equipment/Materials Reviews use of equipment and materials to ensure safe and effective use.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

DELEGATING	**Detailing Assignments** Answers who, what, when, where, and why when assigning tasks.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Delegates When possible, assigns work to staff to meet goals and objectives and to promote employee growth.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Judge of Potential Delegates tasks that challenge and influence employees; gives training if necessary.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

DECISION MAKING	**Best Course of Action** Chooses solutions that meet end results, minimizes problems, and allocates resources wisely.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Implements Decisions Does work or makes assignments to do work without delay.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Makes Decisions Analytically Identifies alternatives, pros, and cons and makes decisions based on facts.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

CREATIVITY	**New Ideas** Looks for new methods, equipment, etc. and is open to change.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Catalyst for Change Brings about changes by making suggestions; asking for input from staff.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Problems/Opportunities Considers problems as opportunity to improve or change for the better.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

EMLOYEE RELATIONS	**Respect** Staff looks to supervisor for guidance, help, and feedback; acknowledges supervisor as leader.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Support/Effort Staff accepts assignments and is motivated to meet expectations of supervisor.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Interacts/Communicates Maintains open communications with staff; has good rapport with staff.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

POLICY IMPLEMENTATION	**Policy Goals** Follows policies to meet job goals and objectives in supervising, completing work, and making decisions.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Understands Policies/ Procedures Knows policies/procedures/ standards and follows them.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Job Authority Accepts authority delegated; knows when to act and when to get approval.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

POLICY FORMULATION	**Changes to Policies/ Procedures** Sees policy as subject to change; makes recommendations for changes and improvements.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Impact of Changes Projects the impact of changes on employees, schedules, cost, equipment, and materials.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:
	Policies/Goals Sees policies and procedures as tools to accomplish job goals and objectives.	☐ Below Expectations ☐ Meets Expectations ☐ Exceeds Expectations ☐ Not Applicable	Comments:

CITY OF KIMBALL
PERFORMANCE APPRAISAL

Name: _____ **Date of Employment:** _____

Title: _____ **Current Rate:** _____

Department: _____ _____

Date of Appraisal: _____ **Date of Last Review:** _____

Instructions: Carefully evaluate employee's work performance in relation to current job requirements. Check rating box to indicate the employee's performance. Indicate N/A if not applicable. Evaluation will be averaged for an overall performance rating.

DEFINITION OF PERFORMANCE RATINGS

E – Exceeds Expectations Performance is consistently better than expected and results significantly exceed the requirements of the position. A very high degree of reliability and confidence can be placed in the employee's work.

M – Meets Expectations Performance consistently meets, and sometimes exceeds, the requirements of the position. The employee consistently produces satisfactory results.

S – Meets Some Expectations Performance meets some of the requirements of the positions, but not all. Further development and/or performance improvement is needed within expectation areas.

D – Does Not Meet Expectations Performance in expectation areas is below acceptable levels. Improvement is required within a specified time frame. No step increase should be granted to individuals with this rating.

GENERAL FACTORS	RATING		SUPPORTIVE DETAILS OR COMMENTS
1. **Quality** – The extent to which an employee's work is accurate, thorough, neat and reflects an organized approach to completion.	E		
	M		
	S		
	D		
2. **Productivity** – The extent to which an employee produces a significant volume of work efficiently in a specified period of time.	E		
	M		
	S		
	D		
3. **Job Knowledge** – The extent to which an employee possesses the practical/technical knowledge required on the job.	E		
	M		
	S		
	D		
4. **Reliability** – The extent to which an employee can be relied upon regarding task completion and follow up.	E		
	M		
	S		
	D		

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5. **Availability** – The extent to which an employee is punctual, observes prescribed work break/ meal periods and has an acceptable overall attendance record.	E M S D		
6. **Adaptability** – The extent to which an employee is flexible and adapts to change willingly.	E M S D		
7. **Independence** – The extent to which an employee performs work with little or no supervision.	E M S D		
8. **Creativity** – The extent to which an employee proposes ideas, finds new and better ways of doing things.	E M S D		
9. **Initiative** – The extent to which an employee seeks out new assignments and assumes additional duties when necessary.	E M S D		
10. **Adherence to Policy** – The extent to which an employee follows safety and conduct rules, other regulations and adheres to City policies.	E M S D		
11. **Interpersonal Relationships** – The extent to which an employee is willing and demonstrates the ability to cooperate, work & communicate with co-workers, supervisors, subordinates, and/or public or customer contacts.	E M S D		
12. **Judgment** – The extent to which an employee demonstrates proper judgment and decision making skills when necessary.	E M S D		

1. **Accomplishments or new abilities demonstrated since last review:**

_____

_____

_____

2. **Specific areas of improvement needed:**

_____

_____

_____

3. **Recommendations for professional development (seminars, training, schooling, etc.):**

_____

_____

_____

COMMENTS:

_____

_____

_____

Employee's overall performance in comparison to position duties and responsibilities:

☐ Exceeds Expectations

☐ Meets Expectations

☐ Meets Some Expectations

☐ Does Not Meet Expectations

Evaluated by: _____

Title: _____

Approved by: _____

Title: _____

Employee: _____

(Employee's signature indicates he/she has reviewed the appraisal, as well as the job description.)

CITY OF KIMBALL
Employee Self Evaluation

Employee Name: _____

The purpose of this form is to facilitate communication between City of Kimball management and employees. The City of Kimball recognizes that the performance review process will be most effective if it is a mutual evaluation with the exchange of ideas and suggestions; and through this process the abilities of the employee and the operation of the organization will have been enhanced. This is the ultimate objective of the employer/employee evaluation process. The City of Kimball recognizes that the employee is part of a team and the ability of the employee to meet goals established by the City for the individuals in each position is also dependent upon the availability of other staff time, talents and resources. Therefore, just as the employer intends to document the performance of the employee, the employer also wishes to provide a formal opportunity for the employee to document employer related factors impacting their performance.

Finally, it should be noted that the real value of the appraisal process comes in the form of the dialogue. The evaluation documents are intended not only to serve as a record of the analyses, but more importantly to kindly discussion between employer and employee.

Please make your responses to the following questions as complete as possible and attach additional pages as necessary. Also feel free to provide any additional information that you feel is not adequately addressed in the form and ask any questions that you need answers to. We encourage you to be candid and open in this process. The City's objective is to help you identify the goals that will help you to succeed in your career and for us to provide you with a clear understanding of the resources and other commitments that the City will provide to assist you.

1. **I perceive my overall job performance over the past year as follows:**

   COMMENTS: _____

2. **The greatest improvements in my performance have been made in the following areas, and/or my greatest accomplishments have been as follows:**

   COMMENTS: _____

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3. **Factors that hindered my performance (constraints, problems, obstacles):**

COMMENTS: _____

4. **What do you feel are your primary contributions to the City of Kimball:**

COMMENTS: _____

5. **What do you feel are your job related strengths:**

COMMENTS: _____

6. **My coworkers help in my job performance by:**

COMMENTS: _____

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7. **It would help my performance if my supervisor(s) would make the following changes:**

COMMENTS: _____

8. **This employee review process could be improved by doing the following:**

COMMENTS: _____

9. **I submit the following additional comments for consideration at my review:**

COMMENTS: _____

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Executive Director's Annual Assessment

Please rate your assessment of each category of performance as Remarkable, Satisfactory, Unsatisfactory or Unknown

Organization Wide: Program Development and Delivery	(Circle one)
a. Ensures that the organization has a long-range strategy which achieves its mission, and toward which it makes consistent and timely progress.	R S U Unk
b. Provides leadership in developing program and organizational plans with the Board of Directors and staff	R S U Unk
c. Meets or exceeds program goals in quantity and quality	R S U Unk
d. Evaluates how well goals and objectives have been met	R S U Unk
e. Demonstrates quality of analysis and judgment in program planning, implementation, and evaluation	R S U Unk
f. Shows creativity and initiative in creating new programs	R S U Unk
g. Maintains and utilizes a working knowledge of significant developments and trends in the field.	R S U Unk

Comments:

Administration and Human Resource Management	
a. Divides and assigns work effectively, delegating appropriate levels of freedom and authority	R S U Unk
b. Establishes and makes use of an effective management team	R S U Unk
c. Maintains appropriate balance between administration and programs	R S U Unk
d. Ensures that job descriptions are developed, and that regular performance evaluations are held and documented	R S U Unk
e. Ensures compliance with personnel policies and state and federal regulations on workplaces and employment	R S U Unk
f. Ensures that employees are licensed and credentialed as required, and that appropriate background checks are conducted.	R S U Unk
g. Recruits and retains a diverse staff	R S U Unk
h. Ensures that policies and procedures are in place to maximize volunteer involvement	R S U Unk
i. Encourages staff development and education, and assists program staff in relating their specialized work to the total program of the organization.	R S U Unk
j. Maintains a climate which attracts, keeps, and motivates a diverse staff of top quality people	R S U Unk

Comments:

Community Relations	
a. Serves as an effective spokesperson for the organization; represents the programs and point of view of the organization to agencies, organizations, and the general public.	R S U Unk
b. Establishes sound working relationships and cooperative arrangements with community groups and organizations.	R S U Unk
c. actively participates in community organizations in order to be visible to the community and represent PAHCS	R S U Unk

Comments:

Financial Management and Legal Compliance

a. Assures adequate control and accounting of all funds, including developing and maintaining sound financial practices	R S U Unk
b. Works with the staff. Finance Committee, and the board in preparing a budget; see that the organization operates within budget guidelines.	R S U Unk
c. Maintains official records and documents, and ensures compliance with federal, state and local regulations and reporting requirements (such as annual information returns; payroll withholding and reporting, etc.)	R S U Unk
d. Executes legal documents appropriately	R S U Unk
e. Assures that funds are disbursed in accordance with contract requirements and donor designations	R S U Unk

Comments:

Fundraising

a. Develops realistic, ambitious fundraising plans	R S U Unk
b. Meets or exceeds revenue goals, ensuring that adequate funds are available to permit the organization to carry out its work	R S U Unk
c. Successfully involves others in fundraising	R S U Unk
d. Establishes positive relationships with government, foundation and corporate funders	R S U Unk
e. Establishes positive relationships with individual donors	R S U Unk

Comments:

Board of Directors

a. Works well with board officers	R SU Unk
b. Provides appropriate, adequate, and timely information to the board	R SU Unk
c. Provides support to board committees	R SU Unk
d. Sees that the board is kept informed on the condition of the organization and all important factors influencing it.	R S U Unk
e. Works effectively with the board as a whole	R S U Unk

Comments:

Are there specific performance objectives, either for the executive director or for the agency as a whole, which you would suggest we add for the coming year? Are there any other comments you would like to make?

Name of person completing evaluation: _____