

CITY OF BILLINGS
PERFORMANCE APPRAISAL INSTRUMENT
EXECUTIVE AND MIDDLE MANAGERS
REPORT FORM

1. Type of Review

Annual

Other

2. Review Period

From _____ To _____

3. Next Review Date

CITY OF BILLINGS
PERFORMANCE APPRAISAL REPORT FORM
EXECUTIVE AND MIDDLE MANAGERS

4. Employee Name:

5. Employee Classification/Title:

6. Department:

DEFINITION OF RATINGS

Superior:

Performance is consistently and significantly beyond established standards. Achieves performance objectives at a fully outstanding level and demonstrates exceptional skill levels.

Exceeds Expectations:

Performance is consistently above adequate skill levels. Achieves performance objectives, often beyond expectations.

Meets Expectations:

Performance consistently meets job requirements. Achieves performance objectives as stated.

Needs Improvement:

Performance in one or more skills is less than expected and needs improvement. Direction, supervision and learning are required if performance objectives are to be achieved.

Unsatisfactory:

Performance in several skills is substantially weak. Performance objectives are not met even with close supervision. Substantial improvement by the employee is required.

PART I: MANAGERIAL PERFORMANCE DIMENSIONS

COMMUNICATION: Speaks in a clear, distinct and understandable manner. Is persuasive and effective in explaining City positions, policies, procedures, services, programs and activities. Listens attentively to what individuals (members of the public, peers or supervisors) have to say and can elicit valuable information from others. Uses correct grammar, vocabulary and sentence structure in an effective manner. Is able to summarize a set of facts or ideas so that they are logical, coherent, and clear and can be understood by the reader. In writing reports, letters and memos, uses appropriate grammar, vocabulary, phraseology and sentence structure; is able to write technical and analytical reports clearly and concisely using terms and style which are easily understood by the intended reader.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

INTERPERSONAL SKILLS: Has a genuine interest in and a desire to assist, participate with, and supervise others (members of the public, peers or supervisor). Treats people as he/she would like to be treated and handles their problems in a manner that shows sensitivity to their needs and circumstances. Is effective in dealing with people without arousing antagonism and demonstrates an understanding of situations. Is cooperative in dealing with others and functions as part of the "team". Is capable of treating others in a fair, consistent and impartial manner. Remains calm in difficult and/or pressure situations. Maintains an open and approachable manner. Controls feelings and emotions so that they do not influence his/her judgment and performance. Maintains composure and self-control.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

FLEXIBILITY/ADAPTABILITY: Is able to adapt to changing circumstances, policies, and attitudes of others. Listens to supervisor's suggestions and considers other points of view. Changes behavior or attitudinal responses to fit the situation and work assignment in order to obtain the desired goal. Is able to effectively handle a variety of projects and assignments.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

PART I: MANAGERIAL PERFORMANCE DIMENSIONS

PROBLEM SOLVING/DECISION-MAKING: Knows how to analyze and size up a situation. Isolates and identifies the problem. Evaluates alternative courses of action and makes a logical decision; uses good judgment and common sense in making decisions. Can analyze facts, information and evidence in a logical sequence so that he/she can see the similarities and differences between situations. Knows when to take action and what type of action is appropriate. Takes action to achieve goals beyond what is necessarily called for. Is able to anticipate events and respond appropriately. Recognizes problems and develops alternative solutions for consideration by appropriate higher level staff.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

LEADERSHIP: Demonstrates assertive initiative in perceiving and dealing with problems. Is able to elicit respect from those he/she comes in contact with and in particular those who he/she supervises. Is effective in motivating others and firm in handling problems. Is sensitive to opportunities to improve the quality, customer service, efficiency and effectiveness of City services. Accepts responsibility for the behavior of those he/she supervises. Is assertive and self-confident. Maintains an effective manner and demeanor and sets an example for subordinates. Presents a positive outlook and is willing to devote the time and effort necessary to get the job done. Demonstrates the initiative to learn new procedures and to accept new challenges. Elicits and encourages new ideas, processes and procedures. Instills and maintains a spirit of teamwork.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

MANAGEMENT CONTROL: Delegates authority and responsibility appropriately. Is able to effectively and appropriately schedule work assignments of subordinates. Establishes or uses existing procedures to monitor or to regulate processes, tasks, or activities of consultants and job responsibilities. Takes action to monitor and follow up the results of delegated assignments or projects. Evaluates performance on an effective and timely basis as assigned. Manages the compensation and performance appraisal plan effectively.

Rating:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

PART I: MANAGERIAL PERFORMANCE DIMENSIONS (Continued)

DEVELOPMENT, ADMINISTRATION AND CONTROL OF BUDGET/LOSS CONTROL: Prepares department budgets based on prioritized needs and objectives of the City. Budgets are prepared in prescribed format, submitted on schedule. Administers budgets to balance expenditures and revenues. Assures that work safety standards are met. Allows subordinates at all levels to determine where improvements may be needed before losses occur, and promptly takes appropriate corrective action. Follows up after a loss has occurred, providing appropriate reports and taking required action including, but not limited to, discipline, policy or procedural changes, and any activity required (including training) to minimize or prevent future losses.

Rating:

___ Superior ___ Exceeds Expectations ___ Meets Expectations ___ Needs Improvement ___ Unsatisfactory

Comments:

GOALS AND OBJECTIVES: Develops challenging goals and objectives which correspond with overall City vision, goals and objectives. Is able to develop qualitative and quantitative measurement criteria and standards in order to achieve goals and objectives. Effectively implements mid-year revisions in order to meet changing needs and directions.

Rating:

___ Superior ___ Exceeds Expectations ___ Meets Expectations ___ Needs Improvement ___ Unsatisfactory

Comments:

PART II: PERFORMANCE PLANNING OBJECTIVES

PERFORMANCE OBJECTIVE STATEMENTS	QUALITATIVE AND QUANTITATIVE MEASUREMENT CRITERIA AND STANDARDS	MID-YEAR/ANNUAL STATUS REVIEW

PART III: OVERALL PERFORMANCE SUMMARY

Given the performance dimension ratings and review of accomplishment of performance objectives, the employee's overall performance is rated as:

____ Superior ____ Exceeds Expectations ____ Meets Expectations ____ Needs Improvement ____ Unsatisfactory

Comments:

Actions for Improvement/Development:

Date: _____ Immediate Manager's Signature: _____

Date: _____ Evaluation Meeting Conducted By: _____

By: _____

By: _____

REVIEW COMMENTS AND SIGNATURES

CITY ADMINISTRATOR/ASSISTANT CITY ADMINISTRATOR

Comments:

Date: _____ City Administrator/Assistant City Administrator Signature: _____

EXECUTIVE/MIDDLE MANAGER

Comments:

Date: _____ Manager's Signature: _____