

Employee Name \_\_\_\_\_  
 Employee ID \_\_\_\_\_  
 Department \_\_\_\_\_  
 Job Classification \_\_\_\_\_  
 Review Period - From: \_\_\_\_\_  
 To: \_\_\_\_\_

## Rating Definitions

**Exceeds** - consistently exceeds expectations; goes above and beyond; is highly productive; serves as a role model of outstanding performance and service excellence.

**Meets** - consistently fulfills job requirements, achieves goals and objectives; meets standard job expectations at an acceptable level.

**Below Standard** - consistent failure to meet goals and objectives despite intervention.

**Ratings should be substantiated by factual reasons and specific examples cited under the comments section.**

## Policy Requirements

Description	
Requirement #1: Meet or exceed department fiscal year budget targets.	
Employee Comments	
How successful were you in managing your department budget during the last fiscal year?	
<input type="checkbox"/> Savings realized <input type="checkbox"/> Balanced budget <input type="checkbox"/> Over budget	Comments: <div style="border: 1px solid black; height: 150px; width: 100%;"></div>
Description	
Requirement #2: Ensure that all employees under your supervision receive a performance appraisal, at least annually in accordance with BOS Policy C-21 Employee Evaluation Reports.	

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**Employee Comments**

What percentage of your direct reports received a completed performance appraisal in the last 12 months?

- 100%  
 90%  
 80%  
 less than 70%

Comments:

## Organizational/Department Goals

Countywide organizational goals and objectives will be set each calendar year. Department management shall set department level support goals aligned with countywide organizational goals and objectives. The evaluator may set other department specific mission critical goals at the beginning of the performance plan year. Goals may be weighted according to priority and significance. The year-end appraisal process will involve rating each goal and competency area.

### Current Year Goals

**Organizational Goal #1: To ensure customer centric public service that is better, faster and fiscally prudent through technology.**

**Department's Priority Goals:**

- All county departments will review and update department websites by Year-end.
- All county departments will assess all services for on-line availability by Year-end.

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**Employee Comments**

What have you done this past year to contribute to achieving these organizational goals and objectives?

**Organizational Goal #2: To become the most business-friendly county in California.**

Department's Priority Goals:

**Employee Comments**

What have you done this past year to contribute to achieving these organizational goals and objectives?

**Organizational Goal #3: To improve health and promote livable communities through partnerships, policies, service delivery systems and initiatives.**

Department's Priority Goals:

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**Employee Comments**

What have you done this past year to contribute to achieving these organizational goals and objectives?

## Leadership Competencies

Competencies describe “how” work is performed through an identified set of core competencies. Competencies may include organizational, job specific and/or other developmental competencies. At minimum, all manager pay-for-performance plan documents must incorporate 3 (three) **Lominger™ Leadership Competencies** selected by the County Executive Officer. The evaluator may add two job relevant competencies, keeping to a recommended maximum total of six. A Lominger™ Competency library is accessible at [http://intranet.rc-hr.com/Lominger/comp\\_policy.html](http://intranet.rc-hr.com/Lominger/comp_policy.html)

**Description****Drive for Results**

- Can be counted on to exceed goals successfully
- Action oriented; is constantly and consistently one of the top performers
- Pursues everything with energy and drive; very bottom-line oriented
- Steadfastly pushes self and others for results

**Employee comments, specific examples cited**

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**Description**

**Strategic Agility**

- Has broad knowledge and perspective
- Anticipates future consequences and trends accurately; likes to run multiple “what if” scenarios
- Sought out by others for advice and counsel on strategic issues
- Produces distinctive, compelling and winning strategies

**Employee comments, specific examples cited**

**Description**

**Managing Relationships**

- Establishes and maintains effective relationships with internal/external customers; consistently meets or exceeds customer expectations
- Is candid; relates well to a wide spectrum of people
- Considers diverse viewpoints to address complex problems
- Easily gains trust and support from peers
- Open to learning and responds well to an effective boss/coach who provides latitude
- Understands why groups do what they do; treats direct reports fairly and equitably
- Is able to resolve differences with a minimum of “dust and noise.”

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Employee comments, specific examples cited

## Developmental Goals

Manager and employee shall agree upon at least one to three developmental goals. Development goals must be job relevant, time sensitive and may include developmental competencies using the Lominger™ Competency dictionary.

Description
<b>Developmental Goal #1:</b>
Employee Comments
What progress have you made relative to your developmental goals?
Description
<b>Developmental Goal #2:</b>

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**Employee Comments**

What progress have you made relative to your developmental goals?

**Overall Evaluation Ratings/Definitions**

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**Employee's overall performance evaluation comments**

**Board of Supervisor's Policy C-21** includes a stipulation in the policy language stating anytime an agency/department anticipates giving an employee an overall rating of unacceptable or improvement needed, the agency/department shall notify Human Resources and seek its review and support of the evaluation. In addition, the evaluation will include a specific plan for improvement. (Reference BOS Policy C-21)

**Manager shall provide a narrative summary describing individual performance outcome and substantiate the overall performance rating.**