

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

Rating & Description	
<input style="width: 40px; height: 20px;" type="text"/>	<b>Requirement #1:</b> Meet or exceed department fiscal year budget targets.
Evaluator Comments	
<b>How successful was the employee in managing his/her department budget during the last fiscal year?</b>	
<input type="checkbox"/> <b>Savings realized</b> <input type="checkbox"/> <b>Balanced budget</b> <input type="checkbox"/> <b>Over budget</b>	Comments: <div style="border: 1px solid black; height: 150px; width: 100%; margin-top: 5px;"></div>
Rating & Description	
<input style="width: 40px; height: 20px;" type="text"/>	<b>Requirement #2:</b> 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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Evaluator Comments	
<p><b>What percentage of your employee's direct reports received a completed performance appraisal in the last 12 months?</b></p> <p><input type="checkbox"/> 100%</p> <p><input type="checkbox"/> 90%</p> <p><input type="checkbox"/> 80%</p> <p><input type="checkbox"/> less than 70%</p>	<p>Comments:</p> <div style="border: 1px solid black; height: 250px; width: 100%;"></div>

## 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.
<div style="border: 1px solid black; width: 150px; height: 30px; display: inline-block; margin-bottom: 5px;"></div> <p><b>Department's Priority Goals:</b></p> <ul style="list-style-type: none"> <li>All county departments will review and update department websites by Year-end.</li> <li>All county departments will assess all services for on-line availability by Year-end.</li> </ul>

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**Evaluator Comments**

What did the employee do 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:

**Evaluator Comments**

What did the employee do 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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**Rating & 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

**Evaluator comments, specific examples cited**

**Rating & 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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Evaluator 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.

Rating & Description
<input type="text"/> Developmental Goal #1:
Evaluator Comments
What progress has the employee made relative to his/her developmental goals?
Rating & Description
<input type="text"/> Developmental Goal #2:

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**Evaluator Comments**

What progress has the employee made relative to his/her developmental goals?

## Overall Evaluation Ratings/Definitions

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**Evaluator's overall performance evaluation rating & 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.**

