

### **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			
F	Requirement #1: Meet or exceed department fiscal year budget targets.		
	, , , , ,		
<b>Evaluator Comments</b>			
How successful was the	employee in managing his/her department budget during the last fiscal year?		
	Comments:		
Savings realized			
Balanced budget			
Over budget			
Rating & 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.		



	Employee Name	
	Employee ID	
	Department	
	Job Classification	
	Review Period - From:	
	То:	
Evaluator Comments		
Vhat percentage of you nonths?	ur employee's direct reports received a completed performance ap	praisal in the last 12
	Comments:	
<b>100%</b>		
90%		
<b>80</b> %		
less than 70%		

### **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.		



Employee Name	
Employee ID	
Department	
Job Classification	
Review Period - From:	
То:	
Evaluator Comments	
What did the employee do this past year to contribute to achieving these organizational g	roals 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 g	oals and objectives?
Organizational Goal #3: To improve health and promote livable communities through pardelivery systems and initiatives.	tnerships, policies, service
Department's Priority Goals:	



	I lali Evaluation Template
	Employee Name
	Employee ID
	Department
	Job Classification
Revie	ew Period - From:
	То:
Evaluator Comments	
What did the employee do this past year to contribute to achieving the	se 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 <a href="http://intranet.rc-hr.com/Lominger/comp">http://intranet.rc-hr.com/Lominger/comp</a> policy.html

Rating & Descrip	tion
	<ul> <li>Drive for Results</li> <li>Can be counted on to exceed goals successfully</li> <li>Action oriented; is constantly and consistently one of the top performers</li> <li>Pursues everything with energy and drive; very bottom-line oriented</li> <li>Steadfastly pushes self and others for results</li> </ul>
Evaluator comm	ents, specific examples cited



**Employee Name** 

Employee ID	
Department	
Job Classification	
Review Period - From:	
То:	
Rating & Description	
Strategic Agility	un multiple "what if"
Rating & Description	
<ul> <li>Managing Relationships</li> <li>Establishes and maintains effective relationships with internal/ex consistently meets or exceeds customer expectations</li> <li>Is candid; relates well to a wide spectrum of people</li> <li>Considers diverse viewpoints to address complex problems</li> <li>Easily gains trust and support from peers</li> <li>Open to learning and responds well to an effective boss/coach wl</li> <li>Understands why groups do what they do; treats direct reports fa</li> <li>Is able to resolve differences with a minimum of "dust and noise."</li> </ul>	no provides latitude airly and equitably



**Employee Name** 

	Employee ID	
	Department	
	Job Classification	
	Review Period - From:	
	То:	
Evaluator comments, spe	cific examples cited	
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Davalanmantal	Cools	
<u>Developmental</u>	<u>Goals</u>	
Manager and employee sh	nall agree upon at least one to three developmental goals. Deve	elopment goals must be job
	d may include developmental competencies using the Lominger™	
Rating & Description		
Dev	elopmental Goal #1:	
Evaluator Comments		
What progress has the em	ployee made relative to his/her developmental goals?	
Rating & Description		
Dev	elopmental Goal #2:	



	I fair Evaluation Template
	Employee Name
	Employee ID
	Department
	Job Classification
Rev	view Period - From:
	To:
Evaluator Comments	
What progress has the employee made relative to his/her developme	antal goals?
what progress has the employee made relative to his/her developme	ental goals:
Overall Evaluation Ratings/Definitions	
<b>Exceeds</b> - consistently exceeds expectations; goes above and beyond outstanding performance and service excellence.	d; is highly productive; serves as a role model of
<b>Meets</b> - consistently fulfills job requirements, achieves goals and ob acceptable level.	ejectives; meets standard job expectations at an
Below Standard - consistent failure to meet goals and objectives despi	ite intervention.
Ratings should be substantiated by factual reasons and specific exam	ples cited under the comments section.
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.



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### Manager Version **Performance Recognition Plan Evaluation Template**

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		Employee ID	
		Department	
		Job Classification	
		Review Period - From:	
		То:	
I have r	eviewed, underst	tand and am in receipt of a copy of the evalua	ation referenced or
this signature form.			
	Date		Date
Employee Signature		Evaluator Signature	
Department Manager Signature	Date	Administration Signature	 Date
Department Manager Signature	Date	Administration Signature	Date
Additional Department Signature	Date	Additional Department Signature	 Date
(optional)		(optional)	