



ASK Transit

Policies/Forms on Performance Evaluations for General Managers

Information compiled on March 16, 2010.

The Question: Does your Board conduct a performance evaluation for your General Manager/Executive Director? If so, please share any forms, policies, procedures, etc. associated with this task.

Asotin County says ...We don't have a specific evaluation at this time.

Ben Franklin says ...Not that I know of.

Columbia County Public Transportation says...Our Board does not conduct a performance eval on the GM.

Community Transit says... Community Transit's Board of Directors evaluates the CEO on an annual basis. They usually use the attached form.

Everett Transit says... Everett's Transit Director is evaluated annually with all other appointive employees. The form is attached.

Grays Harbor Transit says...Grays Harbor Transit Board does not perform evaluations on the General Manager.

Jefferson Transit says....Jefferson Transit does typically complete an annual review for the GM position but we do not have specific forms that used year after year.

Mason Transit says...no.

Pacific Transit says...no

Pullman Transit says... Pullman Transit does not have a "General Manager" so the City Council does do the Transit Manager's evaluation. That is done by the Public Works Director and we use the attached form.

Skagit Transit says... We do not have a form. Our Executive Director gives the Board a summary of his accomplishments for the evaluation period.

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Spokane Transit says...Our Board conducts an annual review of our CEO but has not shared any of that information.

Twin Transit says... No, never had a formal evaluation in six years since been employed.

Whatcom Transit says...The WTA Board of Directors uses the attached form to review the GM's performance.

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Assessment of the General Manager—Short Form

		Not Satisfied		Satisfied		Not Sure	Not App.
How satisfied are you that the general manager		1	2	3	4	NS	NA
1.	has been successful in pursuing or achieving his or her annual performance goals?						
2.	has developed a clear vision for the future of the transit system?						
3.	has successfully communicated an understanding of the transit system's mission to board members, staff, and the community?						
4.	has developed appropriate goals and strategies to advance that mission?						
5.	has established operational objectives that support the transit system's strategic plan?						
6.	has efficiently led the staff in the implementation of the strategic plan and any annual plans?						
7.	has effectively led the staff in managing and administering the services the transit system offers?						
8.	has a thorough knowledge of the transit system's mission areas?						
9.	has a strong understanding of the technical, operational, and ethical issues facing the transit system?						
10.	has developed and implemented appropriate fund-raising and financial development strategies?						
11.	has ensured that solid planning and budgeting systems are in place?						
12.	has ensured that the transit system's goals and strategic plan serve as a basis for sound financial planning?						
13.	has recruited and developed qualified staff to accurately assess, manage, and project the financial health of the transit system?						

		Not Satisfied		Satisfied		Not Sure	Not App.
How satisfied are you that the general manager		1	2	3	4	NS	NA
14.	has worked with the staff to develop, maintain, and use appropriate operating systems and resources that facilitate the effective operation of the transit system?						
15.	has maintained a strong working relationship with the board, characterized by open communication, respect, and trust?						
16.	has modeled effective working relationships with the board to staff?						
17.	has established appropriate systems for dialogue and communication between the board and staff?						
18.	has established and maintained positive relationships with the many groups that support or are involved in the work of the transit system?						

6. What should be the organizational goals for the general manager for the coming year?

7. What should be the personal development goals for the general manager for the coming year?

8. Additional comments:

CITY OF EVERETT - APPOINTIVE STAFF
PERFORMANCE REVIEW & DEVELOPMENT PROCESS
(Annual)

The purpose of the Employee Performance Review and Development Process is to:

- **SET PERFORMANCE STANDARDS** The manager and employee review the employee's Job Description and any other information that outlines special projects and/or job requirements (Performance Review Summary Form – Required Skills and Performance Competencies, special project scopes, critical dependencies, department project calendars, etc.).
- **COMMUNICATE** The manager and employee communicate openly and honestly about performance on an on-going basis to enable employees to stay on track and correct or enhance performance throughout the year.
- **EVALUATE** The manager and employee evaluate the employee's performance over the last review period against previously established standards and development assignments.
- **DEVELOP** The manager and employee identify actions and opportunities that the employee can take to assist his/her development during the next review period.

PERFORMANCE RATING DIMENSIONS & DEFINITIONS

These rating definitions can be used for individual performance skills and as an overall performance rating for the rating period. For example, an employee may receive a Consistent Performance rating in several skill areas, an Outstanding rating in one or more areas and a Development Needed in one or more areas. In this example the employee's *overall* performance rating may still be Consistent Performance. Development opportunities would focus on the area(s) in need of improvement.

OUTSTANDING - Performance is so outstanding that contributions are widely recognized.

All the applicable criteria listed under Outstanding were met, plus an extraordinary level of achievement and commitment was demonstrated in terms of time, technical knowledge and skill, ingenuity, creativity and initiative. Model leadership qualities were exhibited and assistance and mentoring were provided to others whenever possible. Results obtained and work outcomes *significantly* exceeded those expected. **A rating of Outstanding requires substantiating comments that describe the employee's extraordinary level of performance. Also, an overall rating of Outstanding requires pre-approval by the rater's supervisor.**

EXCEEDS EXPECTATIONS - Performance consistently *exceeds* job requirements.

All position responsibilities and/or skill criteria were exceeded and all planned objectives were achieved above the established standards. Obstacles to the achievement of objectives were overcome while at the same time good working relationships with subordinates, peers and superiors were developed or enhanced.

CONSISTENT PERFORMANCE - Performance consistently *meets* all job requirements.

All major position responsibilities and/or skill criteria were met and planned objectives were accomplished within the established standards. Any minor areas where performance should have been better were counterbalanced by superior accomplishments such that overall expectations were met. There were no critical areas where accomplishments were less than planned. Good working relationships with subordinates, peers and superiors were established or maintained.

DEVELOPMENT/IMPROVEMENT NEEDED - Performance does not meet the minimum job requirements; development and/or improvement is required.

Performance in one or more major area(s) does not meet expectations. Not all planned objectives were accomplished within the established standards, and some position responsibilities were not completely met. Development activities will be implemented to ensure that performance improves to a Meets Expectations level within six months.

UNSATISFACTORY - Performance is unacceptable.

Major position responsibilities were not met in several areas and important objectives were not accomplished even with close supervision and guidance. Specific, detailed performance improvement plans must be written and progress reviewed with the employee at least every 30 days. The employee must increase his/her performance level to Development Needed or above within the agreed upon time (30 - 90 days) or re-assignment or termination may result. **An overall rating of Unsatisfactory must be pre-approved by the rater's supervisor.**

APPOINTIVE STAFF PERFORMANCE REVIEW SUMMARY

EMPLOYEE NAME: _____

DATE OF LAST REVIEW: _____

JOB CLASS TITLE: _____

THIS REVIEW PERIOD - FROM: _____ TO: _____

Rating Definitions: Please comment on the employee’s performance using the Performance Rating Definitions on the cover page (O) - Outstanding, (EE) – Exceeds Expectations, (CP)– Consistent Performance, (DN) – Development/Improvement Needed, (U) - Unsatisfactory. Behaviorally anchored scales have been included to assist you in evaluating the employee's performance in each performance area. These scales help to ensure that different raters use the same evaluation criteria for the performance dimensions.

Comments/Action Plans: Comments should be provided to support your rating in each area. Comments are required when a rating of Unsatisfactory, Development/Improvement Needed, or Exceeds Expectations is indicated. **A rating of Outstanding requires substantiating comments.** You may attach additional sheets to accommodate these comments if needed. A development action plan **must be** completed in Section IV of this form for all areas where an employee is rated Unsatisfactory or Development/Improvement Needed. **Overall Ratings of Unsatisfactory and Outstanding require pre-approval by the rater’s supervisor.**

SECTION I – REQUIRED SKILLS & PERFORMANCE COMPETENCIES FOR ALL EMPLOYEES

INITIATIVE/PERSONAL PERFORMANCE COMMITMENT: Relates to skills and behaviors that show personal commitment to assignments, duties, responsibilities and goals and to the ability to pursue these through personal motivation.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> • Puts forth minimum effort and needs close supervision to start and/or complete assignments/duties. • Work outputs are often incomplete or contain errors. • Looks to others to find mistakes and suggest corrections. • Waits for others to assign tasks and create work schedule/timelines. • Often misses critical deadlines. • Cannot be depended on; often does not follow through on commitments. • In attentive to personal and departmental goal establishment and fulfillment 		<ul style="list-style-type: none"> • Requires normal supervision. • Satisfactorily completes assignments/duties. • Checks own work to assure accuracy before delivery of projects. • Looks for or requests additional assignments if time allows. • Creates own schedule to accommodate assignments. • Uses time wisely, overcomes common obstacles, meets assigned deadlines unless unusual or special circumstances arise. • Is dependable; follows through on commitments unless unusual circumstances arise. • Establishes and works to fulfill personal and departmental goals. 	<ul style="list-style-type: none"> • Works independently, even if not required. • Work outputs significantly exceed requirements. • Continually seeks better ways to improve job and/or department. • Requests opportunities to learn new duties/skills. • Self-starter, excellent time management skills, productivity is consistently above average. • Overcomes obstacles through own initiative, able to complete projects on time despite of unusual/special circumstances. • Is considered highly dependable; assists others in meeting commitments and deadlines. • Develops and fulfills especially challenging personal and departmental goals. 	

INITIATIVE/PERSONAL PERFORMANCE COMMITMENT RATING: _____

Comments:

PROFESSIONALISM: Relates to behaviors that support personal and professional integrity and honesty.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Does not accept consequences of actions; places blame on others. Has on occasion displayed questionable behavior in personal and/or professional interactions; is perceived as inconsistent, unfair and untrustworthy. Creates hardship on others in the department due to punctuality and/or excessive unexcused attendance incidents. 		<ul style="list-style-type: none"> Able to understand consequences of actions and accepts responsibility for actions. Questions actions which appear to violate rules of fairness or honesty. Considered fair, respectful and honest by peers and subordinates; is trusted as a colleague. Consistently prompt for work and meetings; is careful to report back from breaks/lunch on time. Punctuality/attendance is not an issue, reasons for absences are substantiated and unavoidable. Observes all safety rules and follows all policies and procedures to ensure safety and security of others. 		<ul style="list-style-type: none"> Accepts accountability for consequences and outcomes related to area of responsibility. Considered to have high integrity by peers, subordinates and superiors; others seek his/her judgment. Outstanding punctuality to work and meetings; rarely tardy or absent.
<p>PROFESSIONALISM RATING: _____</p> <p>Comments:</p>				

TECHNICAL SKILLS: Relates to the tasks and duties of the job and the tools, knowledge and/or skills required to perform those tasks and duties. When evaluating skill in this area focus on specific knowledge or tools required in the position, for example: proficiency in a particular computer language or application; use of special equipment; researching/analyzing information; project management skills and tools; developing/writing policies and procedures; managing people and projects.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Has limited knowledge of area. Cannot recognize common problems or apply standard solutions. Has minimum/limited experience/training in area. Needs instruction and close supervision to complete basic tasks/responsibilities. 		<ul style="list-style-type: none"> Has average knowledge of his/her position. Can identify common problems and apply standard solutions. Has applicable degree/certificate/ license and/or training in the area. Requires instruction for unusual or special assignments only. 		<ul style="list-style-type: none"> Has superior knowledge of all phases of his/her position. Can apply non-standard solutions to uncommon problems. Has additional degree/certificate/ license or experience <i>and</i> can apply knowledge appropriately. Often assists and instructs others in area of assignment.
<p>TECHNICAL SKILLS RATING: _____</p> <p>Comments:</p>				

CUSTOMER SERVICE/WORKING RELATIONS: Relates to skills and behaviors that support interpersonal relations in the workplace.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Does not maintain composure and self control in difficult and/or pressure situations. Does not communicate with internal and external customers in a meaningful and timely manner. Is insensitive, disrespectful, and unfair to co-workers and customers. Does not maintain confidentiality. At times possesses a negative attitude toward customers and co-workers. Is unwilling to assist customers and co-workers. 		<ul style="list-style-type: none"> Maintains composure and self-control, even in difficult and/or pressure situations. Keeps internal and external customers informed in meaningful and timely manner. Shows sensitivity, respect, and fairness with employees, co-workers and customers. Contributes to a harmonious work environment of respect, free of discrimination, harassment, hostility, and retaliation. Maintains confidentiality. Maintains positive attitude toward customers and co-workers. Willing to assist customers and co-workers. 		<ul style="list-style-type: none"> Serves as an example of tact and diplomacy to staff and other coworkers. Always willing to assist customers and coworkers. Proactively creates ways to better serve and improve relations with internal and external customers. Always maintains a positive attitude, regardless of the difficulty of the circumstances and challenges faced.
<p>CUSTOMER SERVICE/WORKING RELATIONS RATING: _____</p> <p>Comments:</p>				

TEAMWORK: Relates to skills, behaviors and abilities to work successfully with others and promote a positive attitude and environment, where shared goals are pursued and achieved through group communication and effort.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Unwilling to work with others complains when assigned group activities/assignments; neglects group and organizational goals. Focuses on self; actions detract from group efforts; behavior lowers productivity of group efforts. Criticizes group members/co-workers; is insensitive to others. Mistrusts others; unwilling to share ideas. 		<ul style="list-style-type: none"> Willing to work with others and contribute actively to achieving group and organizational goals. Strives to maintain a positive attitude for self and team. Cooperates willingly and respectfully with group members/co-workers. Fairly considers and implements the ideas of others. 		<ul style="list-style-type: none"> Consistently contributes, encourages and promotes team building efforts and goal attainment. Always maintains positive attitude; assists others during difficult circumstances. Facilitates cooperation between individuals and groups. Solicits input from others; shares information and authority.
<p>TEAMWORK RATING: _____</p> <p>Comments:</p>				

JUDGEMENT/DECISION MAKING: Relates to the necessary skills and ability to research and analyze information in preparation for and execution of sound decisions.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Makes assumptions without investigating or establishing facts. Arrives at conclusions without considering a range of alternatives. Fails to or inaccurately defines the question/problem which requires a solution. Makes unwise, questionable, or naïve decisions that do not withstand test or challenge. Often is indecisive on complex issues and adds to confusion. 		<ul style="list-style-type: none"> Effective fact-finding skills; identifies critical information; able to collect, integrate and evaluate appropriate information. Able to separate symptoms from causes, reach logical conclusions and develop solutions. After appropriate/adequate analysis, willing to make decisions, commit to a solution and take action. 		<ul style="list-style-type: none"> Superior research and analytical skills. Able to integrate complex information and produce creative yet practical solutions that can be implemented efficiently. Looks beyond the obvious and does not stop at the first answers; generates multiple alternatives. Does not over-analyze, can quickly arrive at correct decisions, even on highly complex issues; willing to take decisive action on important/critical matters.
<p>JUDGEMENT/DECISION MAKING RATING: _____</p> <p>Comments:</p>				

COMMUNICATION: Relates to skills and behaviors that enable clear, succinct and effective communication to individuals and groups in oral and written format.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Inconsistent or scattered communication style; presentation of ideas is unclear and terminology is inappropriate for the audience. Does not share information with others; prohibits effective decision making by providing inadequate or misleading information. Does not listen well; often interrupts others; is argumentative. Written communication is below an acceptable level for the position. Does not seek clarification of issues; allows misconceptions to persist. 		<ul style="list-style-type: none"> Thoughts and ideas are presented clearly and succinctly in language and terminology appropriate to the audience. Shares information with others; provides sufficient information for others to make decisions. Asks questions to clarify misunderstandings. Listens effectively; limits interruptions and challenges others' opinions respectfully. Written communication is clear and understandable and is presented in appropriate format for audience. 		<ul style="list-style-type: none"> Persuasive and motivating communicator. Presents complex information clearly and succinctly; can communicate difficult concepts to various audiences. Anticipates information needed to facilitate decision making. Asks probing questions to gain thorough understanding; exceptional listening skills. Superior written communication Skills.
<p>COMMUNICATION RATING: _____</p> <p>Comments:</p>				

OTHER JOB SPECIFIC SKILLS: USE this area to address job specific skills that are essential to the jobs function. Additional skills must be directly related to the assigned duties and responsibilities of the position.

<p>DEFINE SKILL:</p> <p>LIST CRITERIA OR EXPECTATIONS:</p>
<p>Comments:</p>
<p>DEFINE SKILL:</p> <p>LIST CRITERIA OR EXPECTATIONS:</p>
<p>Comments:</p>

SECTION II – DIRECTOR/MANAGER/SUPERVISOR – ADDITIONAL PERFORMANCE AREAS:

Complete this section if the employee that is being reviewed manages or supervises the work of other employees.

LEADERSHIP/DEVELOPING OTHERS: Relates to skills, behaviors and abilities that motivate employees and foster an effective working environment and performance based culture.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Personal actions do not support the stated organizational goals and values. Is not open to input from staff or peers. Does not deal with performance problems in a timely manner. Feedback and coaching are minimal. Performance reviews are postponed and/or late. Incidents of employee relations issues are above average. Assigned staff often misses deadlines and work output of the department/work unit is of inconsistent quality. 		<ul style="list-style-type: none"> Leads by example, acts appropriately and conscientiously. Maintains a work environment free of discrimination, harassment and retaliation. Encourages and incorporates peer and employee input. Proactively addresses potential employee issues. Deals effectively with performance issues and inappropriate behavior of employees. Gives timely, positive <i>and</i> corrective feedback throughout the year. Conducts performance reviews on schedule, objectively and consistently. Incidents of employee relations issues are rare. Assigned staff are productive and meet critical deadlines consistently. 		<ul style="list-style-type: none"> Is considered a mentor by staff and peers. Creates a learning environment, actively encourages and provides development opportunities for employees. Has success in turning around difficult/low performing employees. Ongoing feedback is the norm in the department; quarterly performance discussions are held with all employees. Always shares ownership and successes with team. Incidents of employee relations issues are rare or nonexistent. Ability to tailor leadership and motivation style to individuals and situations. Maintains a highly motivated staff; results are often achieved ahead of schedule.
<p>LEADERSHIP/DEVELOPING OTHERS RATING: _____</p> <p>Comments:</p>				

STRATEGIC PLANNING: Relates to skills, behaviors and abilities that are important in developing long range plans for the assigned department or the City overall.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> Department/work unit goals are unclear or not communicated to staff. Strategic planning is not apparent in goals and objectives; goals focus mainly on short-term events and outcomes; has difficulty seeing the big picture and/or thinking strategically. Decisions are made that impact other departments/work groups adversely. 		<ul style="list-style-type: none"> Actively participates in the design and implementation of departmental and organizational plans. Able to think strategically, focusing on critical components. Sets goals consistent with short and long-term organizational objectives; considers both short and long-term implications of decisions. Considers impact of actions on other parts of the organization. 		<ul style="list-style-type: none"> Is sought out for strategic planning expertise and visionary ability. Has recommended <i>and</i> implemented strategic plans successfully and assisted others in the process. Articulates organizational goals and vision in ways that can be applied by others in their daily decisions and actions. Evaluates personal and team performance against short term action plans and the strategic vision of the organization as well as the impact of decisions on other departments/work groups.
<p>STRATEGIC PLANNING RATING: _____</p> <p>Comments:</p>				

PROJECT MANAGEMENT/DELEGATION/IMPLEMENTATION: Relates to the skills, abilities and behaviors that enable an individual to identify and prioritize related issues, projects or resources and to develop an appropriate course of action within established timelines, budgets and/or objectives.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> • Work plans/projects are inconsistent with stated goals. • Work plans for self and others are incomplete, incorrect or non-existent; estimates for time and costs are often understated. • Disorganized; lacking in time-management skills/techniques. • Needs assistance in prioritizing projects; often misses critical deadlines. • Gets buried in details and misses critical dependencies. • Consistently assigns work with short deadlines; inordinate amount of assignments are urgent or rushed. • Does not effectively delegate; delegates pieces of projects/tasks but not responsibility; unavailable for monitoring of delegated assignments. 		<ul style="list-style-type: none"> • Develops and implements work plans that support goals. • Structures action plans for others as required; estimates for time and cost are complete and well researched. • Skilled in time management; is organized. • Effectively manages critical demands and priorities. • Understands project goals while balancing project details. • Establishes effective milestones and measurements to track progress. • Actively delegates to subordinates; matches authority with responsibility when delegating; maintains appropriate monitoring of delegated assignments. 		<ul style="list-style-type: none"> • Develops and manages work plans and timetables effectively; consistently exceeds stated goals due to planning expertise. • Mentors others in action planning, setting goals and time management. • Proactively manages projects and deadlines; crises are rare. • Uses measurement tools to identify best practices to increase efficiency and productivity for future projects. • Uses delegation as a development tool; evaluates progress and provides coaching to ensure goal achievement; encourages others to make self-directed decisions.
<p>PROJECT MANAGEMENT/DELEGATION/IMPLEMENTATION RATING: _____</p> <p>Comments:</p>				

NEGOTIATION/INFLUENCING OTHERS: Relates to the skills, abilities and behaviors that persuade others directly or collaboratively to adopt ideas and to participate and contribute their efforts to achieve objectives.

Skill Level is Unsatisfactory		Skill Level is Consistent with Requirements for the Position		Skill Level is Outstanding
(U)	(DN)	(CP)	(EE)	(O)
<ul style="list-style-type: none"> • Uses authority or intimidation to negotiate agreement or implement plans/ideas. • Ineffective in reaching compromise or mutually agreeable solutions. • Obtains required resources or outcomes at great costs that often outweigh benefits. • Fails to maintain good working relationship with others during negotiations; creates unnecessary conflict or adversarial relationships. 		<ul style="list-style-type: none"> • Persuasive and convincing in promoting ideas; able to gain acceptance of proposed ideas, plans, activities or programs. • Utilizes several techniques to pursue mutually acceptable agreements with others. • Points out advantages of compromise and consequences of failure to achieve agreement. • Obtains required resources or commitments with moderate loss or impact on plans and objectives. • Strives to maintain good working relationships during strained or difficult negotiations. 		<ul style="list-style-type: none"> • Influences opinions and decisions in and outside of the organization while maintaining respect and trust. • Highly effective in negotiating mutually beneficial agreements; focuses on and understands win-win negotiating. • Recognizes value of resources in negotiations and provides attractive presentation of assets to increase bargaining power. • Consistently obtains required resources or commitments and minimizes impact of compromise on plans and objectives. • Consistently maintains effective working relationships despite strained or difficult negotiations.
<p>NEGOTIATION/INFLUENCING OTHERS RATING: _____</p> <p>Comments:</p>				

SECTION III - GOALS/DEVELOPMENT PLAN

PERFORMANCE & DEVELOPMENT GOALS/OBJECTIVES

Using the performance area descriptors as a guide and considering the goals and objectives of your work group, department and the organization, develop assignments that will assist the employee in developing in areas that:

- Relate to the major components, duties and responsibilities of the employee’s job.
- Provide the greatest value to the work group, department and/or organization.
- Are specific, measurable and achievable.

PERFORMANCE/DEVELOPMENT GOALS	DATE/MILESTONE IF APPLICABLE
Development Plan & Measurement:	
Development Plan & Measurement:	

Use additional sheets if necessary

SECTION IV - OVERALL PERFORMANCE RATING

OVERALL PERFORMANCE RATING: _____

The overall rating should correctly reflect the employee's performance during the entire review period and take into consideration performance in skill areas and achievement of previously established development goals. Comments are required when a rating of Unsatisfactory, Development/Improvement Needed, Exceeds Expectations or Outstanding is indicated. A development action plan **must** be completed in Section III of this form for all areas where an employee is rated Unsatisfactory or Development/Improvement Needed.

COMMENTS/RATIONALE:

EMPLOYEE COMMENTS:

MANAGER/SUPERVISOR SIGNATURE: _____

DATE: _____

DEPARTMENT/DIRECTOR APPROVAL: _____

DATE: _____

EMPLOYEE SIGNATURE: _____

DATE: _____

EMPLOYEE PERFORMANCE EVALUATION			EVALUATION PERIOD From: To:
NOTE: This is a triple-use form. Mark the appropriate box below.			PURPOSE OF APPRAISAL <input type="checkbox"/> Annual Review <input type="checkbox"/> Probationary Review <input type="checkbox"/> Other _____
<input type="checkbox"/> SUPERVISOR'S WORKSHEET (To be prepared before the evaluation with the employee)			Does this employee have supervisory responsibility? <input type="checkbox"/> Yes <input type="checkbox"/> No
<input type="checkbox"/> EMPLOYEE'S WORKSHEET (To be prepared before the evaluation with your supervisor)			
<input type="checkbox"/> PERFORMANCE EVALUATION CONFERENCE REPORT			JOB DESCRIPTION REVIEW <input type="checkbox"/> The classification questionnaire has been reviewed in detail.
EMPLOYEE'S NAME (Last, First)		JOB CLASSIFICATION TITLE	
AGENCY City of Pullman	DEPARTMENT Public Works	ANNIVERSARY DATE	SUPERVISOR
SECTION I: PERFORMANCE FOR THE RATING PERIOD			
ACCOMPLISHMENT OF JOB REQUIREMENTS: Performance Dimension A			
ELEMENTS		COMMENTS	OVERALL RATING (Check only one)
QUANTITY OF WORK -			<input type="checkbox"/> FAR EXCEEDS NORMAL REQUIREMENTS
COMPLETION OF WORK ON TIME -			<input type="checkbox"/> EXCEEDS NORMAL REQUIREMENTS
QUALITY AND ACCURACY OF WORK COMPLETED -			<input type="checkbox"/> MEETS NORMAL REQUIREMENTS
INITIATIVE IN ACCEPTING RESPONSIBILITY -			<input type="checkbox"/> MEETS MINIMUM REQUIREMENTS
OTHER ELEMENTS (TO BE DEFINED BY EMPLOYEE AND/OR SUPERVISOR) -			<input type="checkbox"/> FAILS TO MEET MINIMUM REQUIREMENTS
JOB KNOWLEDGE AND COMPETENCE: Performance Dimension B			
ELEMENTS		COMMENTS	OVERALL RATING (Check only one)
KNOWLEDGE OF WORK UNIT PURPOSES, GOALS, AND DUTIES -			<input type="checkbox"/> FAR EXCEEDS NORMAL REQUIREMENTS
COMMAND OF SKILLS NEEDED FOR EMPLOYEE'S POSITION -			<input type="checkbox"/> EXCEEDS NORMAL REQUIREMENTS
COMMITMENT TO IMPROVING SERVICES TO THE PUBLIC -			<input type="checkbox"/> MEETS NORMAL REQUIREMENTS
ADAPTABILITY TO NEW DEVELOPMENTS IN THE JOB -			<input type="checkbox"/> MEETS MINIMUM REQUIREMENTS
OTHER ELEMENTS (TO BE DEFINED BY EMPLOYEE AND/OR SUPERVISOR) -			<input type="checkbox"/> FAILS TO MEET MINIMUM REQUIREMENTS
JOB RELIABILITY: Performance Dimension C			
ELEMENTS		COMMENTS	OVERALL RATING (Check only one)
DEPENDABILITY AND RELIABILITY REGARDING WORK INSTRUCTIONS -			<input type="checkbox"/> FAR EXCEEDS NORMAL REQUIREMENTS
PURSUIT OF EFFICIENCY AND ECONOMY IN THE USE OF RESOURCES -			<input type="checkbox"/> EXCEEDS NORMAL REQUIREMENTS
DEGREE OF NEED FOR SUPERVISION -			<input type="checkbox"/> MEETS NORMAL REQUIREMENTS
EFFICIENCY IN THE USE OF WORK TIME -			<input type="checkbox"/> MEETS MINIMUM REQUIREMENTS
OTHER ELEMENTS (TO BE DEFINED BY EMPLOYEE AND/OR SUPERVISOR) -			

	Γ FAILS TO MEET MINIMUM REQUIREMENTS
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SECTION II. WORK PLAN FOR THE FUTURE

NOTE: BOTH THE EMPLOYEE AND THE SUPERVISOR SHOULD FILL OUT SECTION II ON THEIR WORKSHEETS

WORK PLAN FOR PERFORMANCE AND PLANNING EMPLOYEE DEVELOPMENT OF _____ (employee's name)

FOR PERFORMANCE ON THE PRESENT JOB, THIS EMPLOYEE SHOULD CONCENTRATE ON THE FOLLOWING PERFORMANCE ELEMENTS:

SECTION III. REVIEW

REVIEWER'S COMMENTS (supervisor to the evaluating supervisor)

DEPARTMENT HEAD COMMENTS

EMPLOYEE REMARKS: (For employee use only for Performance Evaluation Conference Report)

The employee is free to record additional comments or raise objections to the ratings made by the supervisor on the Performance Evaluation Conference Report; these comments become a permanent part of the employee's personnel file (attach additional sheets as needed).

I have reviewed this report. REVIEWER'S SIGNATURE	DATE	I have reviewed this report. DEPT. HEAD SIGNATURE	DATE
This report is based on my best judgment of this employee's job performance. EVALUATING SUPERVISOR'S SIGNATURE	DATE	I have received a copy of this evaluation and it has been discussed with me. EMPLOYEE'S SIGNATURE	DATE



Performance Review General Manager

I. Job Factors

Rating Scale—5. Superior
4. Very Good
3. Adequate
2. Needs Improvement
1. Unacceptable

Job Factor	1	2	3	4	5
Knowledge and Skills Knowledge and skills may be practical, technical or experiential and may be obtained through any combination of education, experience or training. Knowledge/skills may range from familiarity with facts, methods and procedures to manual skills to knowledge of organization and supervision, to fields of study or to management ability. This rating measures the incumbent’s proven level of knowledge and skill.					
Complexity Every job presents problems to be solved. Problems may require varying levels of analysis, independent thought, creativity, resourcefulness or judgment. This rating assesses the complexity of thinking, creativity, conceptualization and problem-solving shown by the incumbent.					
Leadership/Management This factor appraises the nature and complexity of leadership and management responsibility for the planning, organization and control of projects and directing or integrating the work of others. This rating indicates the incumbent’s ability to lead and manage assigned staff or programs.					
Communication This factor measures the requirements for active, interpersonal contacts and associations which characterize a job. The focus of this factor is the extent to which the position interacts with other employees or people outside the organization and the nature of that interaction. Communication skills may range from the ability to exchange information to the effective use of the highest level of interpersonal skills. This rating assesses the incumbent’s ability to meet the communication needs of his or her position.					

II. Job Functions

- Rating Scale—1. Superior
 2. Very Good
 3. Adequate
 4. Needs Improvement
 5. Unacceptable

Essential Function	1	2	3	4	5
Board Support Provides Board support by formulating and recommending goals, objectives and policy initiatives to the Board. Carries out Board mandates and develops and presents reports to the Board, as required.					
Organizational Management/Program Oversight Provides organizational management and program oversight to achieve cost-effective, high-quality transportation service delivery. Holds ultimate responsibility for all program and operational decisions.					
Agency Representation and Outreach Represents the WTA before local, state and federal agencies, and other interested parties, providing information and professional consultation in matters pertaining to the programs and services of the system. Meets and confers with local officials and their staffs to plan and coordinate services. Works with Board and local officials to articulate transit system needs to federal and state elected officials. As needed, presents transit system needs and goals before legislative committees. Explains impact of various legislative proposals on system.					
Industry Knowledge and Participation Attends professional meetings and conferences to maintain currency of transportation issues and developments. Obtains technical assistance and advice from national and state agencies and participates actively in their deliberations. Represents the WTA's interests at various professional transit associations. Coordinates with WTA legal counsel to interpret, for the Board, staff or cooperating local authorities, legislation and regulations pertinent to the operation and administration of the system.					
Staff Supervision Provides direct oversight to all department directors, assigned department managers, and the Executive Assistant/Clerk to the Board. This includes hiring, coaching, work plan review and guidance, helping to set priorities, and conducting regular formal performance appraisals.					

Employee _____

Date _____

III. Supervisor Narrative

This is an opportunity for the Chairman of the Board to describe, in narrative form, his or her impressions of the General Manager's work performance.

Employee _____

Date _____

IV. Performance Goals and Career Development

This is an opportunity for the Chairman of the Board and General Manager to agree to specific performance goals and plans for career development. Specific quantifiable objectives should be identified, with dates for achieving them and plans to accomplish them established.

Chairman of the Board

Date

General Manager

Date