

PERFORMANCE EVALUATION GUIDE FOR STAFF RATINGS ON WORKSHEET

The following information is a guide for your consideration to assist in scoring an employee's performance. It is not absolute; it is simply a guide.

OVERALL RATING: Overall rating will be based on composite score from the 25 items listed below. Rate each item by indicating **Unsatisfactory**, **Needs Improvement**, **Meets**, or **Exceeds** rating.

Manager/Supervisors/Staff: Consistent with the rating given, you must provide a comment for all **Exceeds**, **Needs Improvement**, and **Unsatisfactory** ratings to substantiate these ratings. If comment sections with a rating of (E, NI, U) are left blank the review will show as incomplete and will not allow you to save.

JOB PERFORMANCE

A. **Quality of Work:** Consider completed work effort, assignments completed relative to job requirement, accuracy, neatness, and thoroughness of work and pride in the work completed.

- U: Requires a high level of supervision; frequently produces work with errors and/or omissions. Work product appears rushed through; sloppy with no attention to detail.
- NI: Requires a medium level of supervision; often produces work with errors and/or omissions, makes frequent or recurrent errors. Work assignments are not always completed timely.
- M: Produces an acceptable quality of work as defined by the job description. The work is satisfactory, neat, and is without significant error.
- E: Consistently produces work that is thorough, neat, and without error. Performs in an exemplary way that is a model for others to follow, exceeding standards and expectations.

B. **Job Knowledge:** Consider employee's knowledge and understanding of every aspect pertinent to the job (methods, equipment, etc.). The blending of job-related education, skills, best practices and experience.

- U: Displays a lack of basic job knowledge and skills. Requires frequent assistance from the supervisor for routine job skills. Unwilling or unable to learn job fundamentals.
- NI: Displays gaps in basic job knowledge and skills. Requires additional supervision or help to complete the job properly. May occasionally display resistance to learning.
- M: Displays an acceptable level of job knowledge and skills and uses it appropriately to accomplish work tasks. Seeks out supervision as necessary to complete the job properly. Displays a willingness to learn. Attends all mandatory training and additional training opportunities.
- E: Consistently displays in-depth knowledge and skills. Uses historical perspectives relevant to the job and knowledge of best practices to make the job more efficient. Actively seeks to enhance job knowledge and understanding.

C. Care of Town Assets and/or Equipment: Care of Town Assets and/or equipment and maintenance of equipment and tools. Follows policies and procedures in the care, use and handling of Town property and equipment.

U: No regard for assets, tools or equipment. Failure to use safety guards.

NI: Little regard for tools, assets or equipment. Has to be reminded occasionally to clean and maintain tools.

M: Proper use and care of assets, tools and equipment.

E: No loss or damage to assets, tools or equipment due to carelessness or negligence.

D. Accepts Job Instructions / Compliance: Ability to grasp instructions, completes the job according to instruction, and quickly understands new information and situations. Is compliant with laws, policies, rules and regulations.

U: Consistently needs instruction. Does not follow instructions and is not compliant.

NI: Often needs extra instruction, does not follow instructions, and is not compliant.

M: Understands and accepts instructions, new ideas and developments without much explanation. Is compliant with laws, policies, rules and regulations.

E: Adapts to new methods and works through obstacles when encountered. Is always compliant. Provides suggestions for procedure enhancements or process reengineering. Understands instructions on complex assignments.

E. Productivity and Organization: The utilization of available working hours to complete assignments on schedule and in a neat and organized fashion.

U: Frequently does not complete assignments and work is inaccurate or unacceptable. Needs to develop efficient work habits and organizational skills to ensure that work is completed within time expected.

NI: Occasionally work is not finished within time requested and/or work occasionally shows signs of being rushed. Employee is not organized.

M: Assignments are consistently produced within established deadlines. Employee is organized. Work is neat and complete.

E: Completes assignments on or ahead of schedule. Plans, prioritizes and organizes projects or work load. Extra work is accomplished due to the development and use of new efficient work methods.

F. Initiative: Consider employee's ability to act on own responsibility to accomplish needed work. Voluntarily starts projects. Attempts non-routine jobs and tasks. Willingness to approach difficult, unusual, and new assignments.

U: Lacks initiative. Needs constant prodding and oversight from supervisor to complete tasks and/or resistance to new tasks, refuses to learn new tasks or accept changes.

NI: Sometimes requires supervisory push. Requires more oversight than expected from supervisor. Occasionally misses deadlines. Sometimes unable or unwillingly to carry out new tasks and accept change. Never or seldom volunteers. Sticks only to job routine.

- M: Does what is assigned and is generally a self starter. No additional oversight needed. Rarely misses deadlines. Generally willing and able to accept and enact changes and new tasks. Voluntarily attempts to solve non-routine job problems as they occur.
- E: Consistently identifies new projects. Works independently with virtually no oversight. Never misses a deadline and tends to complete tasks early. Very adaptable to new tasks and challenges.

G. Reports and Records: The ability to produce accurate reports and to maintain records.

- U: Inaccurate reports and/or fails to produce required reports.
- NI: Reports are poorly thought out; sloppy record keeping. Reports and files sometimes misplaced, not always properly kept, or employee has to be reminded to produce required reports.
- M: Handles records properly; reports are accurate and timely.
- E: Reports are always accurate and timely. Consistently streamlines processes and/or recommends methods for streamlining processes.

H. Safety Work Habits: Observance of safety practices and procedures. Performs duties in a safe manner and exercises preventative and precautionary safety practices. Identifies and reports hazards, unsafe working conditions, work related accidents, injuries, and damages in a timely manner per Town policy and takes precautions to prevent future incidents (if applicable).

- U: Caused damage to property. Judgment not reliable. Put self and others at risk. Injured self or others.
- NI: Routinely fails to observe sound safety practices. Puts self and others at risk.
- M: Routinely observes safety practices with respect to work, work area and equipment.
- E: Consistently identifies safety concerns. Judgment is reliable.

I. Reliability (Attendance): Dependability and trustworthiness to complete tasks in a timely and efficient manner. Consider employee's ability to follow through on assignments. Is punctual, properly uses breaks/lunch periods, vacation and comp time, reports for mandatory shifts and does not abuse sick leave benefit. Participates and completes all required meetings and training.

- U: Documented leave abuse. Frequent failure to get approval of vacation or days off, consistently tardy or absent following scheduled leave or holidays.
- NI: Leave usage is considerable and demonstrates patterns (e.g. Mondays/Fridays). Vacation/days off are often not prearranged and impacts work unit. Frequently tardy.
- M: Takes appropriate leave. Vacation/days off are prearranged. Employee is dependable. Seldom, if ever, tardy.
- E: Vacation/days off are always prearranged to eliminate impact on work unit. Always reports to work after scheduled holidays or days off. Employee is always dependable and trustworthy.

TEAMWORK

J. Cooperative Teammate: The ability to work well with co-workers and supervisors. Views the success of the organization and team as more important than individual needs and desires. Contributes and promotes teamwork to the department in a cooperative work environment (considerate, helpful, etc.).

U: Ineffective in working with others individually and/or in a team environment. Displays behavior that others perceive as rude or unhelpful. Clear lack of respect for all team members.

NI: Occasionally has difficulty getting along with others and/or working in a team environment. Does not provide adequate assistance to co-workers or is disruptive to team.

M: Cooperative; willing to help. Works well in a team environment. Displays tact in dealing with difficult people. Professional and helpful. Displays respect for others the majority of the time.

E: Extremely successful in working with others. Demonstrates exceptional skill in handling difficult people. Creates a harmonious working environment. Demonstrates respect for team members and actively supports team decisions.

K. Accountability: Consider employee's ability to take responsibility and ownership for decisions, actions and results. Accountable for both how and what is accomplished. Is accountable to the team.

U: Does not deliver results, meet deadlines or admit mistakes. Blames others for shortcomings. Does not keep others informed and/or allows issues to go unaddressed.

NI: Sometimes misses the mark to deliver results or meet deadlines. Occasionally blames others or fails to keep others informed. Does not immediately address issues or sometimes ignores what needs to be addressed.

M: Takes responsibility for how and what results are achieved. Recognizes and admits mistakes. Takes corrective action or provides solutions.

E: Plans proactively and seeks out appropriate resources to achieve results. Admits mistakes, takes corrective actions and helps others learn from any mistake. Is highly responsible. Shares information freely. Recommends and implements solutions.

L. Stress Tolerance: Even temperament. Acceptance of unavoidable tension and pressure. Demonstrates the ability to adapt to unexpected work pressures in a constructive/positive manner. Is open to constructive criticism or suggestions and takes direction willingly.

U: Disrupts work environment; inconsistent personality.

NI: Creates situations invoking stress in others.

M: Absorbs routine pressures of job.

E: Uses skills and knowledge to deal with the cause of the stress. Proactively addresses situations to try to resolve stressful events. Evaluates resources to relieve or reduce stressful situations. Keeps composed and focused on task at hand when dealing with high demand tension/pressure.

M. Shows Respect to Colleagues: Open to discussion in a courteous, polite and kind manner. Actively seeks team members' input for additional information or other perspectives about issues. Does not dismiss others' opinions.

U: Uncooperative, unfriendly, ridicules others or their ideas.

NI: Sometimes has negative effect on others, dismissing opinions on occasion. Is not courteous, polite or kind.

M: Builds rapport by demonstrating respect for others and their opinions. Is courteous, polite and kind.

E: Exceptional enthusiasm with others, creates goodwill. Is courteous, polite and kind. Open to discussion and accepts varying opinions and weighs advice before coming to a conclusion.

N. Actively Communicates: Demonstrates verbal and/or written skills necessary to perform the job. Consider employee's ability to convey information and present ideas clearly, concisely and professionally throughout the organization and with outside contacts. Readily shares necessary/pertinent information with team and responds with appropriate feedback. Listens.

U: Communications are inconsistent in clarity. Messages conveyed inaccurately or inappropriately. Information is withheld. Tone and intention behind the message is inappropriate. Body language is inappropriate or dismissive. Does not listen.

NI: Occasionally messages are lost, misinterpreted, conveyed inaccurately or inappropriately. Information is sometimes withheld. Cannot clearly express ideas. Body language is inappropriate or dismissive. Occasionally listens.

M: Communications are recorded and conveyed appropriately, timely and are consistently clear and concise. Employee listens.

E: Communications are always clear, concise and timely. In addition, goes out of his/her way to clarify the meaning of messages or to help others understand messages. Actively listens and asks questions.

PROFESSIONAL DEVELOPMENT

O. Completes Mandatory Training / Sought Additional Training: Takes all required mandatory training. Employees are also encouraged to develop skills and seek formal training that will enhance their personal development and add to the overall expertise of the organization.

U: Does not complete mandatory training. Does not seek or dismisses training opportunities to improve current skills and/or develop new skills.

NI: May attend training but does not willingly participate and fails to implement new processes learned on the job.

M: Completes all mandatory training. Takes advantage of pertinent training and resources and seeks to develop skills and continuing education. Attends workshops and or conferences that are job specific.

E: Completes all mandatory training. Seeks to increase value to organization and takes advantage and actively participates in training and development opportunities to complete assignments in more efficient ways. Expertly applies new training concepts.

P. Demonstrates Leadership Skills: The ability to positively communicate, lead, influence and inspire work effort through others. Assists, coaches to improve other team members' work or skills and is available when called upon, to engage, help solve problems, motivate others and provide feedback.

U: Engages in behaviors that splinter cohesiveness. Makes no effort to be part of the team, assist others or assist with projects. Focuses only on own needs.

NI: Sometimes has a negative attitude. Has minimal concern for teamwork. Does not consistently assist others or assist with projects.

M: Solid team player. Effective in bonding team together. Generates positive measurable outcomes as a result of teamwork. Possesses strong goal orientation.

E: Inspires a high level of loyalty of employees evidenced by their commitment and motivation; considered an organizational leader and mentor; serves as a mentor in guiding employees to develop their job-related skills or guidance on projects.

Q. Receptive to Coaching, Constructive Criticism and Advice: Open to learning, growth and development both personally and professionally for optimum performance through coaching, and constructive feedback. (For Managers, Supervisors and Crew Leaders, provides timely and consistent coaching, praise, constructive criticism, advice and feedback on job performance to direct reports.)

U: Rejects, ignores or is disrespectful and/or not open to coaching, constructive criticism, praise, advice or feedback on job performance. (For Managers, Supervisors and Crew Leaders, never provides coaching or feedback opportunities to direct reports.)

NI: May attend coaching sessions, but is disrespectful. Does not heed advice or apply concepts. (For Managers, Supervisors and Crew Leaders, rarely provides coaching/feedback opportunities to direct reports. Does not provide feedback with tact or kindness. Does not praise employees for a job well done.)

M: Is open to learning and growth through coaching, feedback or advice and applies concepts. (For Managers, Supervisors and Crew Leaders, provides coaching, praise and feedback opportunities on job performance to direct reports consistently and timely.)

E: Accepts the delivery of constructive criticism, advice, praise and feedback with a sense of goodwill and appreciation for the learning opportunity. Asks clarifying questions, applies concepts and seeks additional training. (For Managers, Supervisors and Crew Leaders, provides frequent and timely coaching, feedback and praise to direct reports in a respectful and kind manner.)

R. Establishes and Achieves Meaningful and Realistic SMART Goals for Upcoming Year: The ability to comprehend, professionally implement and support the evaluation process throughout the year by establishing and achieving at least four SMART Goals.

U: Unwilling to establish SMART Goals. Takes no steps to achieve goals.

NI: Establishes SMART Goals but does not achieve goals.

M: Establishes and achieves SMART Goals.

E: Ability to professionally implement and support the evaluation process throughout the year by establishing SMART Goals, planning, achieving and exceeding all established goals.

TOWN VALUES

S. Practices Stewardship: The responsibility that employees have to understand and manage their impacts on the environment, finding sustainable practices to save money or resources, sustaining Town Values and the responsibility to sustain their own well-being.

- U: Does not responsibly use Town resources and assets. Has no regard for the environment or sustainable practices. Wastes time, resources and money.
- NI: Lacks commitment to responsibly use Town resources and assets. Has “buy-in” to “Vision Statement” but actions/work products do not totally reflect full participation in reaching the Town’s goals.
- M: Demonstrates a commitment to environmental stewardship, sustainable practices, money saving efforts, Town values and wellbeing. Shows effort in achieving Town’s goals.
- E: Fully engaged, motivated, and committed to the careful and responsible management of the Town’s resources and assets. Upholds Town values, saves money and Town resources.

T. Committed to Excellence: “Good Will Ambassadors” who display pride and dignity of the highest caliber in the performance of their duties in public service career. Embraces Town mission and vision and is committed to being the best in all respects.

- U: Lacks energy and persistence towards achieving Town goals. Work product is unacceptable.
- NI: Has “buy-in” to the Town’s vision and mission but actions do not totally reflect full participation in reaching the Town’s goals. Work product is marginal.
- M: Takes action to achieve Town goals. Consistently takes pride in work. Produces solid work product.
- E: Fully engaged, motivated, and committed to achieving and advancing the Town’s organizational goals and work objectives in a measureable way. All work products are of exceptional quality.

U. Acts Ethically and with Integrity at all Times: All employees shall comply with the Code of Ethics for Public Officers and Employees under Florida State Statutes 112, as well as all Town ordinances and policies. Accepts responsibility/accountability for their actions and decisions. Recognizes and does not contribute to gossip, disrespectful, or unprofessional behaviors, workplace harassment, or bullying. Reports to appropriate supervisory level any actions or suspected activity that would be considered unethical.

- U: Frequently caught in lies, basic lack of honesty.
- NI: Takes credit for work done by others and/or attempts to shift blame to others.
- M: Person of their word, gives credit where credit is due, uses honest facts to support conclusions and/or admits when mistakes are made and attempts to correct them. Reports suspected unethical behavior.
- E: Widely respected for their honesty, is the go-to-person for honest answers, opinions, and a role model for other employees. Reports suspected unethical behavior.

V. Judgement: Consider employee's ability to think through situations, weigh factors involved, and make sound decisions. Capacity to make reasonable decisions.

- U: Objectives are not consistently met. Solutions do not identify the nature of the problem and/or do not eliminate the problem.
- NI: Priorities are determined so that most of the objectives are met. Frequently requires assistance with those problems which are complex or sensitive.
- M: Almost always exercises sound judgment. Most problems are recognized and solved, including some which are complex or sensitive.
- E: Priorities are determined so that objectives are consistently met. Problems are recognized and solved, including those which are complex or sensitive. In addition, problems may be changed into positive opportunities and outcomes.

CUSTOMER SERVICE

W. Is Responsive: Ability to interact positively with the public. Demonstrates a clear understanding of customer needs (internal and external), and responds in a timely manner.

- U: Ignores customer inquiries and does not respond.
- NI: Takes too long to respond. Is blunt, discourteous, antagonistic or sometimes tactless. Uses poor communication skills, is impatient or rude.
- M: Agreeable, pleasant, and willing to help. Reliable and consistent response time.
- E: Positively interacts with internal and external customers. Goes above and beyond. Quickly resolves issues and makes recommendations for improvements.

X. Offers Solutions and Follows Through: Ability to develop appropriate solutions and responses to issues, problems or concerns. Able to identify resources to resolve concerns. Resolves issues.

- U: Offers no solutions. Does not follow through.
- NI: Periodically offers solutions. Periodically follows through.
- M: Develops appropriate solutions and follows through.
- E: Researches issues in-depth, analyzes solutions, identifies resources, resolves concerns.

Y. Is Respectful to Customers. Listens:

- U: Is disrespectful and does not listen. Is blunt, impatient and rude.
- NI: Is occasionally disrespectful or does not listen.
- M: Is respectful to customers and actively listens.
- E: Goes above and beyond. Gives undivided attention to customers, actively listens, always responds calmly and kindly.

Specific Jointly Developed Goals/Objectives results for this Review Year:

Other Employee Accomplishments:

Jointly Developed Goals/Objectives for Upcoming Year:

Write the results of the three - three goals established last year. Primary importance is the employee's ability to see how their performance expectations and goals are linked to the Town of Longboat Key's Core Values. Goals should be reviewed with the employee and manager during the Initial Supervisor/Employee Meeting.

Setting Goals – use the **S.M.A.R.T.** formula:

- S - Specific
- M - Measurable
- A - Attainable
- R - Relevant
- T - Trackable

Specific – Precise Terms - Targeted

The goal should define specific results and provide concrete details on what is to be achieved.

Measurable – How much of what and by when – Means for tracking

When writing the goal, define how you and your manager can measure its success. There are several ways to measure goals:

- Behavior: Observable change in an employee's actions.
- Quantity: A numerical increase or decrease.
- Quality: How well the result meets the criteria set in a goal.
- Cycle time: Time from request to completion: processing time.
- Efficiency: Resources (time, budget) applied to achieve the result.

Attainable – Achievable

Goals should be challenging and go beyond your day-to-day duties and at the same time be achievable.

Relevant – Links to results – Results Based

When writing, state the results to be achieved rather than the activity or work processes leading to those results. Focus on what you are responsible for accomplishing.

Trackable – timeframe for action or completion dates (long- or short-term goal)

Establish a time limit. State the date which results must happen or for ongoing expectations, specify how often the goal or expectations must be met as well as how often it will be reviewed.

Example SMART Goals

To reconcile the department financial reports by the fifteenth of every month with no increase or a decrease in reconciliation errors.

To lead the assessment and redesign of the department's webpage in order to create a professional and resident-focused website. Develop, revise, and design by September 2026.

To reduce overtime in the department from 150 hours per month to 50 hours per month by the end of the fiscal year.

Performance Goals

Performance Goals are the “what” you are working to accomplish. They are tied to departmental and organizational strategic priorities. Below is an example of a performance goal:

Implement an enhanced billing management process through web-based technology by April 30. Develop a master design document, and creating stakeholder buy-in and awareness. Ensure functionality of system and new form. Develop the communication and implementation plan for the new process by the end of September. Ready for delivery in mid-October.

Development/Personal Goals:

Development/Personal goals focus on an area you want to develop in order to grow in your job or advance in your career. Below is an example of a development goal:

To increase my effectiveness in giving presentations I will join Toastmasters by March 31 and attend at least 6 monthly meetings by end of the year. I will ask for feedback using the Toastmasters format on my presentations after each staff meeting during the year.

Opportunities for Improvement: Department Head/Manager can comment in this section.

What can I as your Supervisor do to assist you in accomplishing your objectives or assist you with? Employee comments and emphasizes what their supervisor can assist with to help them accomplish their job.

INITIAL SUPERVISOR/EMPLOYEE MEETING - (July 7 through July 31) to establish Evaluation Criteria. Department Heads and Managers are required to meet individually with each employee to review and rate their employees' performance during the performance rating period. Department Heads and Managers should have reviewed a hard copy of the employees' self-review and accomplishments and completed an evaluation on employee prior to the first meeting to discuss. At this meeting, prepare to discuss career goal planning for the upcoming year. Identify training that would be beneficial in helping achieve goals. Prior to the Final Review the completed but unsigned Employee Performance Evaluation shall be sent to the reviewing Manager for review and approval. Employees can make comments during this review stage and the rater can add these to the review.

ONE-ON-ONE MEETING - FINAL REVIEW – (September 1 – October 7) Director/Manager will schedule **ONE-ON-ONE MEETINGS** to review and finalize review. Employees will be asked to sign their final EVALUATIONS by entering their last four digits of their social security number using the Director/Manager's keyboard. This signature only means the form was discussed with employee – NOT whether the employee agrees or disagrees with the Department Head or Supervisor's evaluation of their performance. The ratings the employee receives can be discussed with the next –higher level of supervision who may decide to

adjust the ratings. A copy of the final EVALUATION will be emailed to the employee and department head/manager and a copy stored in the Laserfiche repository.

Once the review is final the review cannot be changed.