

**CITY OF BILLINGS**  
**PERFORMANCE APPRAISAL INSTRUMENT**  
***EXECUTIVE AND MIDDLE MANAGERS***  
**REPORT FORM**

1. Type of Review

\_\_\_\_\_ Annual

\_\_\_\_\_ Other

2. Review Period

From \_\_\_\_\_ To \_\_\_\_\_

**CITY OF BILLINGS**  
**PERFORMANCE APPRAISAL REPORT FORM**  
**EXECUTIVE AND MIDDLE MANAGERS**

3. Next Review Date \_\_\_\_\_

4. Employee Name:	5. Employee Classification/Title:
6. Department:	

**DEFINITION OF RATINGS**

**Superior:**

Performance is consistently and significantly beyond established standards. Achieves performance objectives at a fully outstanding level and demonstrates exceptional skill levels.

**Exceeds Expectations:**

Performance is consistently above adequate skill levels. Achieves performance objectives, often beyond expectations.

**Meets Expectations:**

Performance consistently meets job requirements. Achieves performance objectives as stated.

**Needs Improvement:**

Performance in one or more skills is less than expected and needs improvement. Direction, supervision and learning are required if performance objectives are to be achieved.

**Unsatisfactory:**

Performance in several skills is substantially weak. Performance objectives are not met even with close supervision. Substantial improvement by the employee is required.

## PART I: MANAGERIAL PERFORMANCE DIMENSIONS

**COMMUNICATION:** Speaks in a clear, distinct and understandable manner. Is persuasive and effective in explaining City positions, policies, procedures, services, programs and activities. Listens attentively to what individuals (members of the public, peers or supervisors) have to say and can elicit valuable information from others. Uses correct grammar, vocabulary and sentence structure in an effective manner. Is able to summarize a set of facts or ideas so that they are logical, coherent, and clear and can be understood by the reader. In writing reports, letters and memos, uses appropriate grammar, vocabulary, phraseology and sentence structure; is able to write technical and analytical reports clearly and concisely using terms and style which are easily understood by the intended reader.

**Rating:**

Superior     Exceeds Expectations     Meets Expectations     Needs Improvement     Unsatisfactory

**Comments:**

**INTERPERSONAL SKILLS:** Has a genuine interest in and a desire to assist, participate with, and supervise others (members of the public, peers or supervisor). Treats people as he/she would like to be treated and handles their problems in a manner that shows sensitivity to their needs and circumstances. Is effective in dealing with people without arousing antagonism and demonstrates an understanding of situations. Is cooperative in dealing with others and functions as part of the "team". Is capable of treating others in a fair, consistent and impartial manner. Remains calm in difficult and/or pressure situations. Maintains an open and approachable manner. Controls feelings and emotions so that they do not influence his/her judgment and performance. Maintains composure and self-control.

**Rating:**

Superior     Exceeds Expectations     Meets Expectations     Needs Improvement     Unsatisfactory

**Comments:**

**FLEXIBILITY/ADAPTABILITY:** Is able to adapt to changing circumstances, policies, and attitudes of others. Listens to supervisor's suggestions and considers other points of view. Changes behavior or attitudinal responses to fit the situation and work assignment in order to obtain the desired goal. Is able to effectively handle a variety of projects and assignments.

**Rating:**

Superior     Exceeds Expectations     Meets Expectations     Needs Improvement     Unsatisfactory

**Comments:**

## PART I: MANAGERIAL PERFORMANCE DIMENSIONS

**PROBLEM SOLVING/DECISION-MAKING:** Knows how to analyze and size up a situation. Isolates and identifies the problem. Evaluates alternative courses of action and makes a logical decision; uses good judgment and common sense in making decisions. Can analyze facts, information and evidence in a logical sequence so that he/she can see the similarities and differences between situations. Knows when to take action and what type of action is appropriate. Takes action to achieve goals beyond what is necessarily called for. Is able to anticipate events and respond appropriately. Recognizes problems and develops alternative solutions for consideration by appropriate higher level staff.

**Rating:**

Superior \_\_\_\_\_ Exceeds Expectations \_\_\_\_\_ Meets Expectations \_\_\_\_\_ Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

**Comments:**

**LEADERSHIP:** Demonstrates assertive initiative in perceiving and dealing with problems. Is able to elicit respect from those he/she comes in contact with and in particular those who he/she supervises. Is effective in motivating others and firm in handling problems. Is sensitive to opportunities to improve the quality, customer service, efficiency and effectiveness of City services. Accepts responsibility for the behavior of those he/she supervises. Is assertive and self-confident. Maintains an effective manner and demeanor and sets an example for subordinates. Presents a positive outlook and is willing to devote the time and effort necessary to get the job done. Demonstrates the initiative to learn new procedures and to accept new challenges. Elicits and encourages new ideas, processes and procedures. Instills and maintains a spirit of teamwork.

**Rating:**

Superior \_\_\_\_\_ Exceeds Expectations \_\_\_\_\_ Meets Expectations \_\_\_\_\_ Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

**Comments:**

**MANAGEMENT CONTROL:** Delegates authority and responsibility appropriately. Is able to effectively and appropriately schedule work assignments of subordinates. Establishes or uses existing procedures to monitor or to regulate processes, tasks, or activities of consultants and job responsibilities. Takes action to monitor and follow up the results of delegated assignments or projects. Evaluates performance on an effective and timely basis as assigned. Manages the compensation and performance appraisal plan effectively.

**Rating:**

Superior \_\_\_\_\_ Exceeds Expectations \_\_\_\_\_ Meets Expectations \_\_\_\_\_ Needs Improvement \_\_\_\_\_ Unsatisfactory \_\_\_\_\_

**Comments:**

## **PART I: MANAGERIAL PERFORMANCE DIMENSIONS (Continued)**

**DEVELOPMENT, ADMINISTRATION AND CONTROL OF BUDGET/LOSS CONTROL:** Prepares department budgets based on prioritized needs and objectives of the City. Budgets are prepared in prescribed format, submitted on schedule. Administers budgets to balance expenditures and revenues. Assures that work safety standards are met. Allows subordinates at all levels to determine where improvements may be needed before losses occur, and promptly takes appropriate corrective action. Follows up after a loss has occurred, providing appropriate reports and taking required action including, but not limited to, discipline, policy or procedural changes, and any activity required (including training) to minimize or prevent future losses.

**Rating:**

Superior     Exceeds Expectations     Meets Expectations     Needs Improvement     Unsatisfactory

**Comments:**

**GOALS AND OBJECTIVES:** Develops challenging goals and objectives which correspond with overall City vision, goals and objectives. Is able to develop qualitative and quantitative measurement criteria and standards in order to achieve goals and objectives. Effectively implements mid-year revisions in order to meet changing needs and directions.

**Rating:**

Superior     Exceeds Expectations     Meets Expectations     Needs Improvement     Unsatisfactory

**Comments:**

## PART II: PERFORMANCE PLANNING OBJECTIVES

PERFORMANCE OBJECTIVE STATEMENTS	QUALITATIVE AND QUANTITATIVE MEASUREMENT CRITERIA AND STANDARDS	MID-YEAR/ANNUAL STATUS REVIEW

### PART III: OVERALL PERFORMANCE SUMMARY

Given the performance dimension ratings and review of accomplishment of performance objectives, the employee's overall performance is rated as:

Superior    Exceeds Expectations    Meets Expectations    Needs Improvement    Unsatisfactory

#### Comments:

#### Actions for Improvement/Development:

Date: \_\_\_\_\_ Immediate Manager's Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Evaluation Meeting Conducted By: \_\_\_\_\_

By: \_\_\_\_\_

By: \_\_\_\_\_

## REVIEW COMMENTS AND SIGNATURES

### CITY ADMINISTRATOR/ASSISTANT CITY ADMINISTRATOR

#### Comments:

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Date: \_\_\_\_\_ City Administrator/Assistant City Administrator Signature: \_\_\_\_\_

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### EXECUTIVE/MIDDLE MANAGER

#### Comments:

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Date: \_\_\_\_\_ Manager's Signature: \_\_\_\_\_

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