

CITY OF BILLINGS
PERFORMANCE APPRAISAL INSTRUMENT
CLERICAL, SECRETARIAL, AND
ADMINISTRATIVE PERSONNEL
REPORT FORM

1. Type of Review

☐ Annual

☐ Other

2. Review Period

From _____ To _____

3. Next Review Date

CITY OF BILLINGS

PERFORMANCE APPRAISAL REPORT FORM CLERICAL, SECRETARIAL, AND ADMINISTRATIVE PERSONNEL

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: CLERICAL, SECRETARIAL, AND ADMINISTRATIVE PERSONNEL PERFORMANCE DIMENSIONS

ORAL COMMUNICATION:

Speaks in a clear, distinct and understandable manner.

Is effective in explaining City 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.

Comments:

Rating				
S	EE	ME	NI	U

WRITTEN COMMUNICATION:

Writes in a clear, concise and meaningful manner.

Is able to summarize a set of facts or ideas so that they are logical, coherent, and clear.

In writing letters and memos, uses appropriate grammar, vocabulary, phraseology and sentence structure; is able to write clearly and concisely using terms and style which are easily understood by the intended reader.

Comments:

Rating				
S	EE	ME	NI	U

INTERPERSONAL SKILLS:

Has a genuine interest in and a desire to assist and work with others (members of the public, peers or supervisors).

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 most 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, impartial manner.

Remains calm under 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.

Comments:

Rating				
S	EE	ME	NI	U

PART I: CLERICAL, SECRETARIAL, AND ADMINISTRATIVE PERSONNEL PERFORMANCE DIMENSIONS (Cont.)

PLANNING/ORGANIZATION:

Schedules and plans most efficient use of time.

Organizes and plans priorities so that they can be accomplished.

Establishes a course of action for self to accomplish a specific goal.

Understands and applies the concept of "completed" staff work.

Keeps appropriate manager advised of the status of projects and work assignments.

Comments:

Rating				
S	EE	ME	NI	U

FLEXIBILITY/ADAPTABILITY:

Is able to adapt to changing circumstances, policies, work procedures and methods, 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 work assignments.

Comments:

Rating				
S	EE	ME	NI	U

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.

Comments:

Rating				
S	EE	ME	NI	U

PART I: CLERICAL, SECRETARIAL, AND ADMINISTRATIVE PERSONNEL PERFORMANCE DIMENSIONS (Cont.)

JOB SKILLS:

Has a thorough knowledge and is able to effectively perform the work in assigned area.

Has a full working knowledge of the administrative and technical duties of the assigned area.

Is able to effectively operate equipment, tools, and/or machines (if appropriate).

Understands applicable methods, techniques and procedures.

Has a thorough understanding of the organization and functions of the City.

Comments:

Rating				
S	EE	ME	NI	U

CUSTOMER SERVICE:

Demonstrates assertive initiative in perceiving and dealing with problems.

Is able to elicit respect from those he/she comes in contact with.

Is sensitive to opportunities to improve the quality, customer service, efficiency and effectiveness of City services.

Is assertive and self-confident.

Maintains an effective manner and demeanor and sets an example for others.

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.

Comments:

Rating				
S	EE	ME	NI	U

SUPERVISORY GUIDELINES:

Performs the assigned duties and responsibilities within the supervision guidelines listed in the class specification for his/her assigned classification.

Works with the appropriate level of independence.

Understands his/her assigned duties and responsibilities as well as his/her role in the Department.

Carries out responsibilities in a timely manner and does not require direction and/or instruction beyond what would typically be expected based upon the assigned classification as defined by the class specification.

Appropriately addresses new and varying work assignments and situations in accordance with the established policies and procedures of the Department.

Comments:

Rating				
S	EE	ME	NI	U

**PART I: CLERICAL, SECRETARIAL, AND ADMINISTRATIVE PERSONNEL PERFORMANCE
DIMENSIONS (Cont.)**

GOALS AND OBJECTIVES:

Develops challenging goals and objectives which correspond with overall Department and City 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.

Comments:

Rating				
S	EE	ME	NI	U

LEAD SUPERVISION (If appropriate):

Is effective in motivating others and firm in handling problems.

Delegates and assigns duties appropriately.

Uses existing procedures to monitor tasks or activities.

Takes action to monitor and follow up the results of delegated assignments.

Comments:

Rating				
S	EE	ME	NI	U

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 Supervisor's Signature:	_____
Date:	_____	Evaluation Meeting Conducted By:	_____
		By:	_____
		By:	_____

REVIEW COMMENTS AND SIGNATURES:

FIRST LEVEL REVIEW

Comments:

Date: _____ Signature: _____
Title: _____

SECOND LEVEL REVIEW

Comments:

Date: _____ Signature: _____
Title: _____

DEPARTMENT DIRECTOR

Comments:

Date: _____ Signature: _____
Title: _____

CLERICAL/SECRETARIAL/ADMINISTRATIVE EMPLOYEE

Comments:

I understand the contents of this appraisal and it has been discussed with me.

Date: _____ Employee's Signature: _____