

**CITY OF BILLINGS**  
**PERFORMANCE APPRAISAL INSTRUMENT**  
***SUPERVISORS***  
**REPORT FORM**

1. Type of Review

Annual

Other

2. Review Period

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

**CITY OF BILLINGS**  
**PERFORMANCE APPRAISAL REPORT FORM**  
**SUPERVISORS**

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: SUPERVISORY PERFORMANCE DIMENSIONS

**ORAL 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.

Rating:

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

**Comments:**

**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 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 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 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.

Rating:

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

**Comments:**

**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 and/or others to accomplish a specific goal. Plans proper assignments of personnel and appropriate use of resources. Understands and applies the concept of "completed" staff work. Keeps appropriate manager advised of the status of projects and work assignments.

Rating:

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

\_\_\_\_ 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:

**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 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. Emphasizes team spirit and teamwork.

### Rating:

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

### Comments:

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

**MANAGEMENT CONTROL** – Delegates authority and responsibility appropriately. Is able to effectively and appropriately schedule work assignment 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 performance appraisal plan effectively.

**Rating:**

— Superior — Exceeds Expectations — Meets Expectations — Needs Improvement — Unsatisfactory

**Comments:**

**SUPERVISORY GUIDELINES** – Performs the assigned duties and responsibilities within the supervision guidelines listed in the class specification for his or her assigned classification. Works with the appropriate level of independence. Understands his or her assigned duties and responsibilities as well as his or her role in the organization. Carries out responsibilities in a timely manner and does not require direction and/or instruction beyond what would typically be expected based upon the intent of 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.

**Rating:**

— Superior — Exceeds Expectations — Meets Expectations — Needs Improvement — Unsatisfactory

**Comments:**

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

**JOB SKILLS** – Has a thorough knowledge and is able to effectively perform the work of the assigned organizational unit. Fully understands the organization and interrelationship of applicable City functions, programs and services. Has a full working knowledge of the administrative and technical duties of the assigned organizational unit. Is able to effectively operate necessary tools and equipment. Understands applicable methods, techniques and procedures. Has a thorough understanding of the organization and functions of local government. Is familiar with applicable local, state and federal legislation and regulations related to City Services.

**Rating:**

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

**Comments:**

**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 and adhere to the "completed" staff work concept. Manages budgets to balance expenditures and revenues unless otherwise approved by the Department Director. 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** – Consistent with Department mission, 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.

**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 Supervisor's Signature: \_\_\_\_\_

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

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

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

### FIRST LEVEL REVIEW

## REVIEW COMMENTS AND SIGNATURES

### Comments:

Date: \_\_\_\_\_ Signature: \_\_\_\_\_  
Title: \_\_\_\_\_

## SECOND LEVEL REVIEW

### Comments:

Date: \_\_\_\_\_ Signature: \_\_\_\_\_  
Title: \_\_\_\_\_

## DEPARTMENT DIRECTOR

### Comments:

Date: \_\_\_\_\_ Signature: \_\_\_\_\_  
Title: \_\_\_\_\_

## SUPERVISORY EMPLOYEE

### Comments:

---

---

---

---

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

Date: \_\_\_\_\_ Employee's Signature: \_\_\_\_\_