



City of Winter Haven

Employee Performance Review Form

Employee _____ Date _____

Classification _____ Dept. _____ Division _____

Evaluation Period _____ through _____ Date of Last Evaluation _____

Appraisal Type: ☐ Annual ☐ Probationary ☐ Other _____

Employee Attendance Record

Fulltime General Employee's Annual Total Hours Worked	_____
Fulltime Fire Employee's Annual Total Hours Worked	_____
Part-time Employee's Annual Total Hours Worked	_____

Annual Safety Record

Preventable Accidents (Personal Injury and/or Property Damage)	<input type="checkbox"/> Yes <input type="checkbox"/> No
Lost Work Time	<input type="checkbox"/> Yes <input type="checkbox"/> No
Recorded Workers' Comp Claim	<input type="checkbox"/> Yes <input type="checkbox"/> No

Section I Performance Evaluation Form Completion Instructions:

Complete the "Performance Skills/Traits" for employees. Note there are five possible levels (Unacceptable to Exceptional) that carry ratings from 0 to 4. Each of the four categories in Section I carries an Importance Factor (IF) of 4, so the HIGHEST possible score per category in Total A is 16: 4 (Mandatory IF) x 4 (highest is E) =s 16; the highest possible score in Total A for all four categories is 64 -- 16 (all Es) x 4 (IF) =s 64. Total B for each category is the mandatory IF of 4 x the Average of "2." Therefore, each "B Total, will be a Mandatory IF of 4 xs the Average of 2 =s 8. Space is provided for general comments. Explanations for all ratings below "Average" as well as an improvement plan must be provided.

General Performance Skills/Traits

IF=Importance Factor: (Mandatory 4) Ratings: U=Unacceptable; M=Marginal; ME=Meets Expectations; EE=Exceeds Expectations; E=Exceptional	IF	U	M	ME	EE	E	TOTAL	
	4x	0	1	2	3	4	A	B
1. Productivity, e.g., handles stress appropriately; adapts well to change in routine and or priorities; is flexible; produces to expectations. General Comments:	4							
2. Quality of Work, e.g., job-related knowledge, skills and abilities reflected in quality work products; communicates and listens well; accepts direction and criticism. General Comments:	4							
3. Dependability, e.g., shows positive attitude; observes rules; follows established policies/procedures; is punctual; does not abuse leave benefits; finishes work correctly and in a timely manner; promotes safety in the workplace. General Comments:	4							
4. Contribution to the Effectiveness of Others, e.g., works as a team member; sets good example; cooperates with others; provides leadership. General Comments:	4							

TOTALS

SECTION I (Total A Divided by Total B x 100)

I a. General Performance Skills/Traits - Explanations for all ratings below “meets expectations,” as well as an improvement plan, must be provided. Additional space for comments is available in Section VII.

CATEGORY # (1-4)	COMMENT
	Describe the unsatisfactory performance (s).
	Is the performance issue related to inappropriate behavior or lack of skill?
	Recommended plan for improvement.
	I will revisit these issues with employee on (provide date).

II. Specific Job Responsibilities/Competencies (Up to 10 ratable items)

Evaluate the performance of the employee based upon the personal competencies listed below. Each competency should be rated objectively and independent of the ratings given to others. There are five levels of achievement by which performance may be measured: U = Unacceptable (0) / M = Marginal (1) / ME = Meets Expectations (2) / EE = Exceeds Expectations (3) / E = Exceptional (4).

IF=Importance Factor: (Mandatory 4) Ratings: U=Unacceptable; M=Marginal; ME=Meets Expectations; EE=Exceeds Expectations; E=Exceptional	IF	U	M	ME	EE	E	TOTAL	
	1x-4x	0	1	2	3	4	A	B
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								
TOTALS								
SECTION II (Total A Divided by Total B x 100)								

II a. General Comments:

II b. Specific Job Responsibilities and Competencies - Explanations for all ratings below “meets expectations,” as well as an improvement plan, must be provided. Additional space for comments is available in Section VII.

COMPETENCY # (1-10)	COMMENT
	Describe the unsatisfactory performance (s).
	Is the performance issue related to inappropriate behavior or lack of skill?
	Recommended plan for improvement.
	I will revisit these issues with employee on (provide date).

III. Leadership Performance (all exempt and supervisory personnel)

Evaluate the performance of the supervisor based upon the job traits listed below. Each should be rated objectively and independent of the ratings given to others. There are five levels of achievement by which performance may be measured. U = Unacceptable (0) M = Marginal (1) ME = Meets Expectations (2) EE = Exceeds Expectations (3) E = Exceptional (4).

IF=Importance Factor: (Mandatory 4) Ratings: U=Unacceptable; M=Marginal; ME=Meets Expectations; EE=Exceeds Expectations; E=Exceptional	IF	U	M	ME	EE	E	TOTAL	
4x	0	1	2	3	4	A	B	
1. Motivation / Leadership: Measures the level of guidance/influence/confidence building/discipline provided to employees; reinforces the good/coaches on deficiencies; demonstrates integrity.	4							
2. Communication / Group Attitude / Morale: Communications are clear, concise and courteous; gives feedback (good and bad); seeks feedback with open mind; stimulates positive, effective work environment through regular staff meetings and/or interaction with other employees; staff/self awareness of City business; staff understanding of job expectations and work unit's/self accomplishments relative to goals and objectives.	4							
3. Quality / Quantity of Group Work: Measures accuracy, thoroughness and completeness of employee's work; goals/standards for quality are met; weekly, monthly and other reports (fact sheets) are thorough/accurate/typed in a timely manner at least 90% of time; prepares detailed budget with zero need to seek special funding approval; measures employee's work output/habits/assignments; meets goals; consistently realizes or exceeds production potential; plans properly — work projects are consistently completed under budget and by established deadlines.	4							
4. Initiative/Performance Management: Works collaboratively; solves problems; assumes additional responsibility; looks for efficient/cost-effective ways; shows enthusiasm/does not complain about work; e.g., offers/pursues opportunities to affect improved, more efficient work processes (measure via examination of staffing levels, overtime/time/materials expenditures; turnover); recognizes/acts on problems or concerns at the lowest level possible — absent outside intervention; engages in promoting the City's goals and objectives; is actively involved in the community (engaged in community service activities regularly); responds to employees' performance needs/ manages performance improvement by showing ability to deal with ineffective, disengaged, poor attitude employees through improvement action plans; engages in mentoring/coaching of all employees; completes and forwards performance evaluations, if applicable, to HR within 30 days of receiving notice to initiate (Call HR for evaluating supervisor's "on time" record).	4							
TOTALS								
SECTION III (Total A Divided by Total B x 100)								

III b. Leadership Performance (all exempt and supervisory personnel) - Explanations for all ratings below “meets expectations,” as well as an improvement plan, must be provided. Additional space for comments is available in Section VII.

COMPETENCY # (1-4)	COMMENT
	Describe the unsatisfactory performance (s).
	Is the performance issue related to inappropriate behavior or lack of skill?
	Recommended plan for improvement.
	I will revisit these issues with employee on (provide date).

IV. Overall Performance Rating Calculation

	Non-exempt, non-supervisory personnel	Exempt and supervisory personnel
	add sections I and II scores; then divide by 2	add sections I, II and III scores; then divide by 3
Performance Rating Subtotal	<input type="text"/>	<input type="text"/>
Bonus Points:		
Attendance	<input type="text"/>	<input type="text"/>
Safety	<input type="text"/>	<input type="text"/>
Total Rating	<input type="text"/>	<input type="text"/>

Performance Evaluation Rating Scale

Evaluate the performance of the employee based upon the performance traits listed in each applicable section. Each trait should be rated objectively and independently of the ratings given to other traits. There are five levels of achievement by which performance skills/traits may be measured.

RATING	LEVEL	DEFINITION
175 - 200+	Exceptional “E”	Extraordinary performance. Work is expert and exemplary; greatly exceeds job requirements and results expected; self initiates; anticipates challenges and discovers unique ways to improve performance; sets standards for best practices.
130 - 174	Exceeds Expectations “EE”	Job requirements are met in all areas and more often than not are surpassed. With few exceptions, work is characterized by unusual accomplishments beyond defined expectations. Has potential for exceptional rating; shows innovation and creativity.
90 - 129	Meets Expectations “ME”	Meets job requirements. Employee is consistently effective in achieving expected results.
50 - 89	Marginal “M”	Inconsistent in meeting job requirements. Work is acceptable in some areas but overall does not meet minimum standards on a regular basis; fails to meet performance expectations. (Ratings may apply to new employees in position and still developing skills).
0 - 49	Unacceptable “U”	Performance is consistently substandard; Employee shows no attempt to overcome inadequacies; omits critical information; does not learn from mistakes. Substantial improvement is necessary to meet minimum job requirements.

V. Management Review

REMARKS	SUPERVISOR INITIALS	EMPLOYEE INITIALS

VI. Employment Status Change and Pay Increase Authorization

REMARKS
<ul style="list-style-type: none">Change Employment Status: _____ No _____ Yes; Change from _____ to _____ Effective _____
<ul style="list-style-type: none">Award Pay Increase: _____ No _____ Yes; Increase Base Rate of Pay _____ Percent From \$ _____ an hour To \$ _____ an hour Effective _____

VII. Supervisor Signatures

	DATE	OPPORTUNITY TO OBSERVE EMPLOYEE			
		DAILY	WEEKLY	SELDOM	NEVER
Initiating					
Reviewing (Division Director)					
Reviewing (Department Director)					
Reviewing (HR Manager)					
Reviewing (City Manager)					

VIII. Employee Response

CATEGORY #	COMMENT

I have read this review, discussed it with my supervisor and commented. I feel it is

- a) appropriate.
b) inappropriate

Employee Signature

Date