



Louisville Metro
Government

Employee Performance Evaluation Instructions

Instructions

The goal setting and evaluation process is designed to be an ongoing conversation between manager and employee throughout the year. The process has three phases.

Phase 1: Goal Setting

At the beginning of the cycle, managers and employees work together to set SMART goals that the employee will work to achieve during the upcoming review period, using the Goal Setting Form.

1. Set a time for employee and manager to meet (ideally 1 full hour).
2. Review the objectives and goals in your Department Strategic Plan (available in Sharepoint > Strategic Planning > choose your department from the dropdown list on the right).
3. Review the employee's core responsibilities, using their Metro Employee Job Description as a reference if needed (available on the Metro HR Sharepoint site).
4. Agree on 2-3 Core Responsibility goals that reflect the employee's main job functions while also aligning with the department's Strategic Plan goals.
5. Agree on 1-2 Individual Development goals are related to professional or personal development. The Metro HR Individual Development Plan may be used as a tool to discuss the employee's career aspirations and define related goals
6. Record a plan for providing ongoing feedback and support to help the employee succeed. Review and agree on the criteria that will be used to evaluate success (see Overall Evaluation form).
7. Sign and submit goals to your department leadership for review.
8. Once approved, the goals should be shared in a central spot that will be visible on a day-to-day basis (like on a whiteboard in the office).

Phase 2: Ongoing Feedback and Mid Year Check-In

At regular intervals (at least every six months, preferably quarterly), managers and employees meet to check in on goal progress.

1. Revisit goals and review progress.
2. Identify changes needed to employee's goals or blockers that need to be addressed.
3. Document the conversation and any changes made using the Mid Year Check In form. Communicate changes to any stakeholders (team members, department leadership).

Phase 3: Overall Evaluation

At the end of the cycle, the employee and manager meet to evaluate progress and discuss feedback.

1. Manager sets up an in-person meeting for the end-of-year evaluation with the employee.

2. One week ahead of the scheduled meeting, the employee completes the Employee Self-Evaluation form and sends it to their manager, along with any supporting work samples or documentation that is exemplary of their performance.
3. Manager reviews these materials and completes Sections 1-5 of the Overall Evaluation form (if completing online, use the "Save and Resume Later" option).
4. Manager and employee meet to review the evaluations and collaboratively complete the feedback section (Section 6) of the Overall Evaluation. This conversation is used to inform the goal setting process for the upcoming cycle.
5. Submit signed and completed evaluation to department leadership for review.

Definitions

SMART goal: A goal that is Specific, Measurable, Actionable, Realistic, and Time-bound. Examples:

- Achieve a 95% or better satisfaction rating from my customers for Service Desk experience for the period of January to June 2014.
- Interview all permanent and 10% of seasonal guest services staff to help determine guest service opportunities and needs by May 2014.

Department goal: A specific outcome that a department wants to achieve that is recorded in the department's current Strategic Plan (available in Sharepoint > Strategic Planning > choose your department from the dropdown list on the right).

Goal health: Describes whether or not the goal or initiative is on track using a color-coded scale:

- Green (On track): Completed or in progress, on schedule, and expected to be completed on time
- Yellow (Slightly off track): In progress, but behind schedule and with issues that might affect completion date
- Red (Off track): Not started, overdue, or in progress but behind schedule and with issues that affect completion date