



City of Boston Performance Review System - Evaluation Form and Ratings Guide

Employee Name: Your Employee

Job Title: Team Leader

Document Type: City of Boston
Evaluations PRS

Template: Performance Review
Evaluation

Manager:

Period: 01/01/2020 - 12/31/2020

Document ID: 1563

Due Date: April 16, 2021

Enter ratings and comments for each section in this evaluation, if applicable. At any point in time you can save this evaluation by selecting the Save button. You can find training by clicking this link to the HUB.

Section 1 - Directions

Introduction

Description :The PRS Evaluation form was developed to meet the following goals:

1. To provide an objective, consistent, and fair system for measuring employee performance;
2. To inform employees of the quality of their work, to identify those areas needing improvement, to set specific objectives for employees, and to provide employees an opportunity to discuss their career goals and the support they need to meet those goals; and
3. To assist department heads and managers in evaluating their workforce, identify employee potential, and establishing priorities for training and education.

Instructions for Evaluators

Description: Important! Before deciding on the rating for the employee, open the icon next to the rating model and read through the behaviors for each rating.

Follow these guidelines in evaluating the employee:

1. Judge each employee on the basis of work being performed.
2. Select the phrase from the rating model which best describes the individual being evaluated.
3. Use the Comments box to explain your rating or to describe an employee's strengths in the area.

Use the Plan for Improvement section to outline action steps you and the employee have discussed to develop the employee, or to outline areas of performance that the employee must improve. If you have given the employee a rating of "does not meet expectations" or "partially meets expectations" in any competency, you must identify the areas for improvement in order for the employee to successfully meet expectations. Outline the actions steps you and the employee have discussed to bring the performance to "successfully meets."

When appropriate, it is recommended that you discuss with employee's opportunities for how they might further develop their strengths and skills. Use the Plan for Development section to identify SMART goals (Specific, Measurable, Attainable, Relevant, Time-Based).

Allow the employee sufficient time to provide comments to the evaluation if the employee wishes. The Core Performance Competencies must be completed for all employees. The Performance Competencies for Managers should be completed if the employee manages or supervises others. If an employee does not manage or supervise others this section should be marked "not applicable".

Instructions for Employees

Description: Answer the Employee Questions section as part of a self-evaluation by using the Employee Comments field below each content item. You may also enter comments or feedback on your performance for each evaluation criteria item in the corresponding Employee Comments fields.

The Employee Comments Section at the end of this evaluation allows for additional comments or answers to any part of the evaluation to be added by the employee after the manager evaluation is shared and before the employee acknowledges the evaluation. Employees will provide an electronic signature to the evaluation through the Acknowledgement step of the evaluation.

The Employee Self Evaluation and the Employee Comments sections are not mandatory, but recommended.

Section 2 - Employee Questions

Question 1

Description: What parts of your job are going most successfully?

Employee Comments:

Question 2

Description :Please describe skills, strengths and accomplishments that you would like to have considered for the current performance review.

Employee Comments:

Question 3

Description: What ideas do you have that would improve your performance/develop your skills/advance your career?

Employee Comments:

Question 4

Description :Please list ideas you have for improvements or changes within your department, organization and/or team(s).

Employee Comments:

Section 3 - Core Performance Competencies

Job Knowledge/Technical Skills

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Significantly Above Expectations	Above Expectations	Successfully Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	NA
Demonstrates extensive knowledge required to perform the job, including new technology where applicable; easily applies principles and procedures to complex assignments, needs little supervision; keeps informed of new developments; readily acquires new skills and technology where applicable	Has become expert in requirements of the job; can anticipate work needs and always follows appropriate procedure	Demonstrates knowledge and skills required to perform the job; understands principles and procedures and can apply to work assignments with minimal supervision	Needs to obtain more professional, administrative, supervisory and/or specialized knowledge to satisfactorily perform the job consistently	Lacks knowledge to be able to perform the job; does not understand principles and procedures; applies knowledge only after repeated explanation or with close supervision	

Manager Rating:

Manager Comments:

Employee Comments:

Productivity and Use of Time

<input type="checkbox"/> Significantly Above Expectations	<input type="checkbox"/> Above Expectations	<input type="checkbox"/> Successfully Meets Expectations	<input type="checkbox"/> Partially Meets Expectations	<input type="checkbox"/> Does Not Meet Expectations	<input type="checkbox"/> NA
Produces volume of work above the requirement on or ahead of established deadline. Demonstrates exceptional ability to manage several responsibilities simultaneously; manages time to produce and often exceed required results	Produces and sometimes exceeds volume of work required or completes ahead of deadline; manages several responsibilities simultaneously, effectively manages time to produce required results	Produces volume of work required by the job and meets deadlines consistently. Demonstrates ability to manage responsibilities simultaneously; manages time to produce required results	Demonstrates difficulty completing assigned workload; needs assistance working on several responsibilities at once; needs assistance with managing time to meet deadlines	Work is below expected output; often fails to meet deadlines; does not work on several responsibilities simultaneously but tends to do one at a time	

Manager Rating:

Manager Comments:

Employee Comments:

Quality of Work

<input type="checkbox"/> Significantly Above Expectations	<input type="checkbox"/> Above Expectations	<input type="checkbox"/> Successfully Meets Expectations	<input type="checkbox"/> Partially Meets Expectations	<input type="checkbox"/> Does Not Meet Expectations	<input type="checkbox"/> NA
Demonstrates innovation and creativity in doing work; work is always accurate and thorough and does not need revisions or involvement of supervisor; often develops new and improved ways of working	Work is consistently accurate and thorough.. develops improved new and better ways of doing the work	Work is accurate and thorough, rarely requiring revisions or further direction from supervisor; accepts and implements new ideas for doing the work	Work is generally accurate and thorough, but occasionally inaccurate or lacking in thoroughness; needs additional direction or assistance from supervisor	Quality of work is below required standards of accuracy and thoroughness; supervisory direction is not followed or sought when needed .	

Manager Rating:

Manager Comments:

Employee Comments:

Initiative and Responsibility

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Significantly Above Expectations	Above Expectations	Successfully Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	NA
Seeks out new or additional tasks, projects or responsibilities; follows through on actions items, exerting effort well beyond what is expected; anticipates problems or opportunities and works to devise solutions or improvements	Sometimes seeks out new or additional tasks, projects or responsibilities; willingly accepts additional work with positive attitude; follows through on action items, suggests improvements for efficiency	Monitors tasks, projects or responsibilities independently, with minimal need for supervision, follows through on action items in timely manner; accepts additional work as requested	Sticks closely to job routine; reluctant to take on additional duties as required; needs assistance in monitoring projects; follow through on action items is slow and sometimes holds up results	Sometimes does not perform responsibilities within job requirements, when directed; requires monitoring to finish projects, duties or responsibilities; does not follow through on action items in a timely fashion to ensure results on the job	

Manager Rating:

Manager Comments:

Employee Comments:

Customer Service

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Significantly Above Expectations	Above Expectations	Successfully Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	N/A
Demonstrates empathy and understanding with customers, internal & external; response to customer needs is always timely and thorough; takes action beyond what is required to help the customer when appropriate; places a priority on customer needs, and always responds within 24 hours; Demonstrates sensitivity toward all members of the workforce & public with regard to race, color, ethnic origin, gender, age, sexual orientation, religion, disability & gender identity	Demonstrates empathy and understanding toward customers, internal & external; provides complete and accurate information and service to customers; responds to customer needs in a timely manner; Demonstrates sensitivity toward all members of the workforce & public with regard to race, color, ethnic origin, gender, age, sexual orientation, religion, disability & gender identity	Demonstrates respect and understanding toward customers, internal & external at all times; provides complete and accurate information and service to customers; makes self available to respond to customer needs; demonstrates a willingness to help the customer; resolves complaints/problems promptly; usually returns calls/responds within 24 hours; Demonstrates sensitivity toward all members of the workforce & public with regard to race, color, ethnic origin, gender, age, sexual orientation, religion, disability & gender identity	Sometimes communicates with lack of patience or empathy with customers, internal & external; information and service not always complete or accurate the first time; occasionally fails to follow up on problems/complaints; not always available to assist the customer; needs improvement in responding within 24 hours; Needs to demonstrate more sensitivity toward the workforce & public with regard to race, color, ethnic origin, gender, age, sexual orientation, religion, disability & gender identity	Sometimes uses inappropriate or unprofessional language, conduct or demeanor when communicating with customers, internal & external; gives inadequate service or information; lack of willingness to help customers; lacks follow through on complaints, does not return calls in timely manner; Needs to demonstrate more sensitivity toward the workforce & public with regard to race, color, ethnic origin, gender, age, sexual orientation, religion, disability & gender identity	

Attendance and Punctuality

<input type="checkbox"/> Significantly Above Expectations	<input type="checkbox"/> Above Expectations	<input type="checkbox"/> Successfully Meets Expectations	<input type="checkbox"/> Partially Meets Expectations	<input type="checkbox"/> Does Not Meet Expectations	<input type="checkbox"/> NA
Rarely absent; on time for work on a daily basis; observes breaks and lunch periods; always punctual at meetings and appointments	Rarely absent from work; negligible # of absences within Attendance Policy guidelines; seldom late if at all; punctual at meetings and appointments	Acceptable # of absences within Attendance Policy guidelines; rarely late to work; observes break times and lunch times; punctual at meetings and appointments	Exceeds # of absences acceptable within Attendance Policy guidelines; late arrival at work. occasionally takes extended breaks or lunch breaks	Exceeds # of absences acceptable within Attendance Policy guidelines; frequently late; absences cause hardship to department; does not consistently adhere to breaks or lunch times	

Manager Rating:

Manager Comments:

Teamwork and Relating to Others

<input type="checkbox"/> Significantly Above Expectations	<input type="checkbox"/> Above Expectations	<input type="checkbox"/> Successfully Meets Expectations	<input type="checkbox"/> Partially Meets Expectations	<input type="checkbox"/> Does Not Meet Expectations	<input type="checkbox"/> NA
Excellent work relationship with supervisor and coworkers to accomplish goals; has a noticeably positive effect on work group; voluntarily assists and supports others	Maintains positive work relationship with supervisors and coworkers to accomplish goals; assists and supports others as required with enthusiasm	Maintains effective work relationship with supervisors and coworkers to accomplish goals; assists and supports others as required	Sometimes displays inability working with supervisors and/or coworkers	Does not work well with supervisor and/or coworkers to accomplish group goals.	

Manager Rating:

Manager Comments:

Employee Comments:

Section 4 - Performance Competencies for Managers

Performance Management

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/> NA
Significantly Above Expectations	Above Expectations	Successfully Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	
Does exceptional job of setting and communicating high standards of performance; identifies employee strengths and develops them through training, coaching and mentoring; provides developmental coaching as well as annual review	Sets and communicates high standards of performance; develops employees through training and coaching; provides ongoing performance coaching as well as annual review	Sets and clearly communicates realistic performance expectations; evaluates performance objectively; provides timely, candid feedback; provides on the job coaching as needed; conducts annual performance reviews	Needs to more clearly establish performance expectations; should provide more on the job training and coaching; does not give adequate and timely feedback to employees on a regular basis; needs to conduct more thorough performance reviews	Fails to adequately train new employees or adequately provide needed on the job training; does not assist employees in improving work habits; does not provide counseling for progressive discipline when needed; fails to conduct annual performance reviews	

Manager Rating:

Manager Comments:

Employee Comments:

Planning and Organizing Skills

<input type="checkbox"/> Significantly Above Expectations	<input type="checkbox"/> Above Expectations	<input type="checkbox"/> Successfully Meets Expectations	<input type="checkbox"/> Partially Meets Expectations	<input type="checkbox"/> Does Not Meet Expectations	<input type="checkbox"/> NA
Exceptionally good at planning and organizing work/projects; forecasts needs and plans accordingly; innovative in managing the workload; schedules work for self and employees to meet and sometimes exceeds organizational goals	Fully plans & organizes work/projects; resourceful in managing the workload; schedules work for self and employees to meet organizational goals	Sufficiently plans and organizes work/projects; able to manage an unusual workload when required; schedules work for self and employees to meet organizational goals	Sometimes does not plan and organize work/projects adequately; occasionally falls behind in workload; needs assistance with setting priorities and controlling progress of the work/project	Often fails to plan and organize work/projects effectively; work/projects often fall behind. objectives are not completed on time; does not adequately schedule own time or employees work; works on low priorities instead of more important work	

Manager Rating:

Manager Comments:

Employee Comments:

Supervisory Leadership

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Significantly Above Expectations	Above Expectations	Successfully Meets Expectations	Partially Meets Expectations	Does Not Meet Expectations	NA
Involves and communicates effectively with staff in building goals and objectives and establishing expectations for work unit, solicits and uses new ideas; delegates work in a way that inspires staff to go beyond what is expected in achieving organizational objectives	Articulates goals, objectives and expectations for work unit; is able to delegate work to inspire staff to willingly achieve organizational objectives	Clearly communicates goals, objectives and expectations to meet organizational objectives; able to get staff to follow directives to achieve organizational objectives	Needs to effectively communicate goals, objectives and expectations for work unit; needs to delegate work more effectively w/staff.	Lacks goals, objectives and expectations for the work unit. does not effectively communicate to staff does not delegate work effectively;	

Manager Rating:

Manager Comments:

Employee Comments:

Section 5 - Plan for Improvement

If you have given the employee a rating of "Does Not Meet Expectations" or "Partially Meets Expectations" for any competency, you must identify an action plan that describes what the employee must do to successfully meet expectations. This action plan should be created during the performance appraisal meeting. The Plans for Development/Improvement must be reviewed within 30 days and revised as needed.

Use the Add Item button to add a new Goal/Action Step and the date for follow up.

Section 6 - Plan for Development (Optional)

When appropriate, or if the employee requests, it is recommended that you discuss with employees opportunities for how they might further develop their strengths and skills. Identify 2-3 SMART goals (Specific, Measurable, Attainable, Relevant, Time-Based). This may involve new projects or responsibilities, training (on the job, courses offered through the City or approved agency), coaching that you offer, mentoring, and so on.

Use the Add Item button to add a new Goal/Action Step and the date for follow up.

Section 7 - Employee Comments

Employee may make final comments to the evaluation here. Employee must submit the comments within 7 days.

Attachments

(The manager has the option of adding attachments documenting the evaluation, and/or if requested by the employee.)

Audit History

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