

Performance Appraisal for Exempt Positions and Non-Exempt / Non-Bargaining Unit Positions

Instructions for filling out the Performance Appraisal Report Form:

- A. This form is to be used for the following positions:
 - Exempt/Executive/Non-Bargaining Unit** - Chief Executive Officer, Director of Finance, Director of Operations, Director of Program Services.
 - Exempt/Professional/Non-Bargaining Unit** - Quality Assurance & Planning Analyst, Facilities Supervisor, Human Resources Manager, Information Technology Manager, Center Operations Manager Family/Community Development Manager, Child Development & Education Manager, Health & Nutrition Services Manager, EHS & Training Manager, Center Manager.
 - Non-Exempt/Professional/Non-Bargaining Unit** - Special Projects & Events Coordinator, Community Outreach & Recruitment Coordinator.
 - Non-Exempt/Administrative/Non-Bargaining Unit** - Executive Assistant to CEO, Executive Secretary, Facilities Clerk, Program Services Secretary, Human Resources Assistant, Personnel Administrator, Benefits Administrator, Finance Clerk, Finance Administrator, Accounts Payable Administrator, Purchasing Processor, Payroll Processor, Center Operations Secretary.
 - Non-Exempt/Technical/Non-Bargaining Unit** Maintenance Technician.

- B. Under each applicable factor on the form indicated your rating of the employee's performance during the rating period. Define the difference between rating levels with this guide and your own specific job related standards:
 1. **Unsatisfactory Performance** - Does not meet the minimum requirements of the job.
 2. **Below Expectations** - Sometimes acceptable, but not consistent.
 3. **Meets Expectations** - Consistently meets the requirements of the job in all aspects.
 4. **Exceeds Expectations** - Clearly and consistently above what is required.
 5. **Exceptional Performance** - Unique and exceptional accomplishments.

Comments by Supervisor are required for Exceptional, Below Expectations or Unsatisfactory Performance ratings; additional sheets may be attached as needed.

- C. Under the **Additional Criteria and/or Comments** sections, write any job specific standards and or expectations which apply to the rating you are giving. Ratings of *Exceptional Performance*, *Marginal Performance* or *Unsatisfactory Performance*, require comment on the employee's performance or reference to pre-established expectations.

- D. Complete the Overall Performance Appraisal Rating and the *Employee's Job Duties, Goals and Development Plan for the Next Appraisal Period*. Under the comments by Supervisor section provide an overall summary of your basis for judgment, examples, and/or reasons for the overall rating.

- E. Sign and submit the form, development plan to the Human Resources Department.

- F. Hold the Review Meeting to share and discuss the results of the performance appraisal.

Performance Appraisal

Employee Name:			
Title:		Department/Center:	
Supervisor:			
Period Rated:			

1. Job Knowledge:	
<p>The demonstration of technical, administrative, managerial, supervisory, or other specialized knowledge required to perform the job. Consider degree of job knowledge relative to length of time in the current position. If applicable, consider the individual's computer knowledge and efforts to learn new skills and maintain up-to-date job related information.</p>	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
<p>Additional criteria and/or comments:</p>	

2. Quality and Consistency of Performance:	
<p>The demonstration of accuracy, thoroughness, and reliability in a consistent manner. Consider consistent organization, presentation, completeness, and appearance of work.</p>	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
<p>Additional criteria and/or comments:</p>	

3. Quantity of Work:	
The volume of work produced by the employee, along with his or her speed and consistency of output.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

4. Initiative and Resourcefulness:	
The extent to which the employee is self directed, resourceful and creative toward meeting job objectives. Consider how well the employee follows through on assignments and modifies or develops new ideas, methods, or procedures to meet changing circumstances.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

5. Communication with Supervisor and other staff:	
The extent to which the employee conveys and receives ideas, information and direction, and seeks to clarify and confirm the accuracy of their understanding of familiar or vague terms and instructions. Consider clarity of oral and written communication.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

6. Cooperation and Reliability:	
The extent to which the employee builds and maintains work relationships and contacts needed to effectively address problems and opportunities associated with their position. Consider whether the employee is active in resolving workplace conflicts, the employee's willingness to undertake assigned projects, support for organizational goals and endeavors.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

7. Planning and Organizing Effectiveness:	
The extent, to which the employee effectively plans, organizes and implements tasks or programs. Consider the employee's use of time and facilities subject to their control. Consider the degree to which the employee meets deadlines, maintains a clear grasp of daily tasks, and prioritizes duties in a manner consistent with organizational objectives. Also how the employee handles pre-planning. Planning work distribution among employees; efficient utilization of available staff.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

8. Attendance and Punctuality:	
The extent to which the employee can be depended upon to be available for work and to fulfill position responsibilities in a timely manner. Consider whether the employee reports to work on time, communicates schedule changes promptly to supervisor, and maintains regular attendance.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

9. Staff Relations:	
Shows fairness and impartiality in interactions; is interested in employee welfare; elicits staff input where feasible; responds to staff suggestions and complaints in a serious, sensitive, and timely manner; facilitates staff adaptability; is knowledgeable about and in compliance with the Agency's Equal Opportunity policies.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

10. Leadership and Supervision:	
Ability to give direction without conflict; to present management level decisions in a fair, impartial manner without any appearance of favoritism. Ability to motivate employees to accomplish goals. Uses a team approach; leads by example.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

11. Professionalism:	
Ability to discuss staffing issues in an appropriate and positive manner. Following dress codes and ability to be a role model by maintaining consistency of professional appearance as well as demeanor and attitude. Ensuring department staff maintains a professional level of appearance and respectful interaction with colleagues and other departments. Ability to represent the agency.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

12. Judgment :	
Ability to analyze problems and procedures, evaluate alternatives, and select best course of action; use of logic and common sense in decision making; following the direction of management philosophy in making sound supervisory judgment.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

13. Knowledge of Federal, State & Local Laws and Regulations:	
Employee's general job knowledge of Head Start Performance Standards, the Head Start Act of 2007, and other federal, state and local laws and regulations as they relate to the position.	<input type="checkbox"/> Exceptional Performance <input type="checkbox"/> Exceeds Expectations <input type="checkbox"/> Meets Expectations <input type="checkbox"/> Below Expectations <input type="checkbox"/> Unsatisfactory Performance
Additional criteria and/or comments:	

Overall Performance Appraisal Rating

An overall rating is required - please check *only one*.

<input type="checkbox"/> Exceptional Performance
<input type="checkbox"/> Exceeds Expectations
<input type="checkbox"/> Meets Expectations
<input type="checkbox"/> Below Expectations
<input type="checkbox"/> Unsatisfactory Performance

Comments by Supervisor: (Additional sheets may be attached)	
Comments by Employee: (Additional sheets may be attached)	
Employee's Job Duties, Goals and Development Plan For Next Appraisal Period	
1. Primary job duties or assignments for the next appraisal period:	
2. Date for next review of these duties and objectives:	
3. Desired changes or improvements in the employee performance in the next appraisal period:	
4. Coaching, training or development activities to be pursued in the next appraisal period:	

Employee's Signature:	Date:
Rating Supervisor's Signature:	Date:
Immediate Director's Signature:	Date:

(Employee's signature does not necessarily mean agreement with the appraisal. It merely acknowledges that the employee has had the opportunity to discuss the appraisal with the supervisor)

Return the original of the Performance Appraisal to the Human Resources Department.

LONG ISLAND HEAD START

Professional Development Plan

Date:		Goal Completion Date:	
Name & Title:		Department:	
Signature:		Location:	
Supervisor:		Supervisor Signature:	

<u>My professional growth goals are consistent with the following Agency/department goals:</u>
1.
2.
3.

Employee's Signature:	Discussed with employee on:
Evaluator's Signature:	Date:
Human Resources:	Date: