

## **SAMPLE APPRAISAL OF PERFORMANCE<sup>1</sup>**

**NAME:** \_\_\_\_\_

**EVALUATION PERIOD:** \_\_\_\_\_

Rate Category I: 1= Exceptional; 2= Exceeds Expectations; 3= Meets Expectations; 4=Below Expectations.

### **I. MANAGEMENT and LEADERSHIP PRACTICES (20–40%) \_\_\_\_\_**

#### **A. Elected Body Relationships**

Does not surprise board; all board members are informed of organization activities, progress, and problems on a regular basis.

Is receptive to board member ideas and suggestions

Makes sound recommendations for board action

Effectively implements policy decisions of the board

Facilitates the decision-making process for the board

Follows up on all problems and issues brought to his or her attention

Is nonpartisan; does not show favoritism

Accepts responsibility

#### **B. Organizational**

Leads a smooth-running and continuously improving organization

Proposes organizational goals and objectives prior to each fiscal year

Anticipates and plans well in advance

Is progressive in attitude and action

Follows through on set plans and deadlines

Emphasizes development and enhancement of the skills of all employees

Hires and retains competent staff members who know what is expected of them

Delegates effectively

Encourages high staff productivity and demands accountability

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<sup>1</sup> Adapted and used with permission from Gregory J. Bielawski, ICMA Senior Advisor and Illinois Range Rider, g\_bielawski@hotmail.com

### **C. Community Relations**

Is appropriately visible and active within the community

Understands and is knowledgeable about the needs of the community

Encourages and honestly considers community input

Requests feedback from the community on the performance of the organization

Provides programs and services that are up to community standards and expectations

### **D. Fiscal Performance**

Prepares and presents a long-range financial plan, which is updated as circumstances dictate

Presents balanced annual budgets with programs and service levels clearly identified

Recognizes and manages the budget within fiscal constraints

Displays common sense and good judgment in business transactions

Seeks all available funding sources

Provides accurate and complete financial reports in a timely manner

### **E. Intergovernmental/Agency/Association Relationships**

Participates in professional management and leadership organizations

Effectively collaborates, coordinates, and communicates with other communities, regional associations, and similar organizations

### **F. Communication**

Responds to all requests for information in a timely and thorough manner

Speaks and writes clearly

Responds to correspondence, phone calls, and requests for information in a timely and thorough manner

Provides all necessary and required reports and records

Ensures that information of general interest is current and timely, that website is up-to-date, and that available technology is used effectively

Provides details about specific projects to those affected in a timely manner

### **G. Personal**

Is ethical, honest, and of high integrity

Projects professional demeanor and respect in all interactions

Is cordial and approachable

Explain and support your rating—whether 1, 2, 3, or 4—and support it with specific examples

## II. GOAL/TARGET ACHIEVEMENT (60–80%) \_\_\_\_\_

Rate Category II: 1= Exceptional; 2= Exceeds Expectations; 3= Meets Expectations; 4=Below Expectations.

(Place the letter or number of each goal/target for the year on the appropriate line below).

\_\_\_\_ Achieved

\_\_\_\_ Partially achieved

\_\_\_\_ Not achieved

Comments:

## III. SUGGESTED GOALS/TARGETS FOR UPCOMING YEAR

A.

B.

C.

## IV. WHAT SHOULD THE MANAGER START DOING, STOP DOING, AND CONTINUE DOING?

OVERALL EVALUATION: \_\_\_\_\_

Board Member Name \_\_\_\_\_ Date \_\_\_\_\_

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## Questions to Answer When Doing Your Appraisal

- 1) What impressed you the most favorably about \_\_\_\_\_'s performance this past year?
- 2) In what areas has \_\_\_\_\_ shown exceptional performance?
- 3) What's your major area(s) of concern regarding \_\_\_\_\_'s performance this past year?
- 4) What specific recommendations/expectations do you have for \_\_\_\_\_ to improve performance?
- 5) What should be \_\_\_\_\_'s top three goals/targets for the next year?