INSTRUCTIONS FOR COMPLETING EMPLOYEE PERFORMANCE EVALUATION FORMS

Before completing the attached evaluation form, re-read the District's policy and procedure statement governing employee performance evaluations. Then, for each performance dimension listed, evaluate the employee's performance by placing a check mark next to the appropriate rating box. The statements below the boxes are designed to give you examples of what the employee's behavior might "look like" when associated with the accompanying rating. These statements are neither all inclusive nor intended to exclude other forms of behavior which might justify such a rating. An employee does not need to demonstrate all of the behaviors to "fit" that category. The statements are merely examples to help guide the evaluator. If a particular dimension does not apply to this employee, check the box "N/A" for "not applicable", if such a box has been provided, or state the reasons the employee was not evaluated on this dimension in the comments section following. After rating the employee on each of the applicable dimensions listed, write any comments or suggestions for improvement in the space provided for such. After rating the employee in each performance dimension, assign him/her an "overall" rating which should be a composite of the individual ratings. Lastly, fill in the sections entitled "career goals and objectives" and "summary comments of rater".

DEFINITION OF RATING CATEGORIES

To help guide you on use of the five rating categories for each performance dimension, use the following "working" definitions to help you:

SATISFACTORY means the employee's overall performance in this category is "acceptable" and generally consistent with what is expected of other incumbents in the class.

ABOVE AVERAGE means the employee's overall performance in this category is "good" and generally above the level of what is expected and demonstrated by many other incumbents in the class.

OUTSTANDING means the employee's overall performance in this category is "excellent" and noticeably exceeds the level of what is expected and demonstrated by most other incumbents in the class. This rating does not mean the employee is "perfect."

NEEDS IMPROVEMENT means the employee's overall performance in this category is "marginal" and generally below the level of what is expected and demonstrated by other incumbents in the class.

BELOW STANDARD means the employee's overall performance in this category is "unsatisfactory" and, although not stated explicitly on the evaluation form itself, the District's expectation for employees given an OVERALL rating of below standard is that their performance be brought up to standard over a period of time, or disciplinary action may need to be considered.
INSTRUCTIONS TO SUPERVISOR: Complete this form when an employee receives a less than satisfactory overall evaluation or as otherwise provided by any current MOU. Attach additional sheets if necessary.

1. EXPECTATIONS: For the performance deficiency in question, state your expectation or standard that would indicate satisfactory performance, when and how this was communicated to the employee.

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

2. DEFICIENCIES: State, in specific terms, how the employee's work performance is deficient; that is, how it fails to meet the standards and expectations described above. Also, indicate how you know this.

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

3. CORRECTIVE ACTION: State in specific, observable, and measurable terms what the employee must do to bring his/her performance up to the required standard and overcome the deficiencies described above. Also, state the date by which he/she is expected to accomplish this correction. If another meeting has been scheduled to review progress, write the date of that meeting below.

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
4. ASSISTANCE: Indicate what help you, or others, will provide to the employee to assist in improving performance. This could include more training, closer supervision, more frequent meetings, and related offers of assistance.

___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________
___________________________________________________________________________

5. SIGNATURES

<table>
<thead>
<tr>
<th>Immediate Supervisor</th>
<th>Date</th>
<th>Employee*</th>
<th>Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department Head</td>
<td>Date</td>
<td>Human Resources Manager</td>
<td>Date</td>
</tr>
</tbody>
</table>

* Note to Employee: Your signature does not necessarily mean you agree with the above, only that you have seen it and it has been discussed with you. You are subject to the conditions described herein, whether or not you sign the document.
CONTRA COSTA WATER DISTRICT
Secretarial Employee Performance Evaluation Form

Name: ___________________________                Department: ___________________________

Classification Title: ___________________________

Period Covered: From ___________ To ___________

Type of Review: □ 3 month probationary □ 6 month probationary □ Annual

SUPERVISORS: Read the instruction sheet accompanying this form before attempting to complete this evaluation of the employee.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

1. **Telephone Skills:** Consider ability to effectively receive, screen and direct callers and perform departmental receptionist function.

- Rude and abrupt with callers; frequently disconnects people; creates poor image.
- Sometimes loses calls or gets message wrong; has difficulty if interrupted; transfers callers before determining problem.
- Able to handle most calls effectively; acceptable in receptionist function; does not often confuse messages.
- Good telephone manner; goes out of way to try to help caller; courteous and tactful; creates good image for office.
- Very effective style; very efficient and courteous; consistently gets info correct the first time; refers routine matters with ease.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

2. **Handling Correspondence/Records Management:** Consider ability to receive, sort and route incoming mail; and compose and proofread outgoing correspondence with correct English usage; and maintain administrative files consistent with the Uniform Filing Code.

- Routinely loses or misfiles documents; has disorganized; misfiles things;
- Generally able to keep track of correspondence;
- Has organized way of dealing with high volume;
- Extremely efficient; can locate most
<table>
<thead>
<tr>
<th>Control of Work</th>
<th>Correspondence</th>
</tr>
</thead>
<tbody>
<tr>
<td>very poor grammar, spelling, punctuation and sentence usage.</td>
<td>cannot be relied upon to compose correspondence by self; English usage is erratic.</td>
</tr>
<tr>
<td>dence efficiently; composes routine letters and memos; uses acceptable grammar and spelling.</td>
<td>of correspondence; able to locate files/respond to many inquiries alone; uses correct English.</td>
</tr>
<tr>
<td>comments readily; handles many non-routine items without direction; very good command of English language.</td>
<td></td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
3. **Calendaring Functions:** Consider ability to schedule meetings and appointments, make conference or travel arrangements, and generally assist manager with time management.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unreliable; cannot deal with detail; confuses issues; misses deadlines and is inaccurate.</td>
<td>Does routine scheduling but has difficulty with non-standard issues; must have procedures explained repeatedly.</td>
<td>Generally able to handle scheduling requirements; deals with details within parameters defined; knows when to ask.</td>
<td>Able to handle multiple priorities at once; adapts to changes of plans; flexible and adaptable in approach.</td>
<td>Extremely efficient; keeps manager on time and schedule; deals with many non-routine issues very independently.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

4. **Work Organization:** Consider ability to plan and organize work and meet deadlines.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does not follow routine methods; very disorganized; often misses deadlines.</td>
<td>Does routine tasks but does not plan non-routine work efficiently.</td>
<td>Works in orderly way and uses time effectively.</td>
<td>Plans work well; always handles jobs systematically; meets most deadlines.</td>
<td>Highly organized person; prioritizes large volume of work; meets most deadlines smoothly.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

5. **Typing and Dictation Proficiency:** Consider speed, accuracy and extent of word processing capability, and ability to take and transcribe dictation (if required) by manager.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slow typist; makes excessive number of errors; not PC literate; unable to take dictation.</td>
<td>Speed has slipped below standards for the class; accuracy could be better; dictation skills</td>
<td>Speed and accuracy meet standards for the class; familiar with basic word processing; can</td>
<td>Good typist; speed and accuracy exceeds standards; proficient with PC equipment;</td>
<td>Excellent typist; noticeably superior to most others; word processing skills far exceed others;</td>
</tr>
<tr>
<td>are marginal.</td>
<td>transcribe dictation from machine.</td>
<td>able to take and transcribe dictation.</td>
<td>very proficient at dictation.</td>
<td></td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: 

________________________________________________________________________________________

________________________________________________________________________________________
6. **Use of Office Equipment:** Consider familiarity with personal computers, photocopiers, FAX machines, cellular phones, 10-key adding machines, pagers, 2-way radios and the like.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is confused by office equipment; always needs help to operate.</td>
<td>Can do routine tasks but frequently has difficulty with non-standard tasks.</td>
<td>Can operate most equipment with sufficient degree of efficiency and speed.</td>
<td>Above average ability; comfortable using most office equipment.</td>
<td>Extremely well qualified; can use to perform the more complex and non-standard tasks.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

7. **Confidentiality:** Consider ability to maintain confidentiality of information and use of discretion on what is disclosed to others.

| Cannot be trusted; unable to maintain confidentiality; starts or adds to rumors. | Occasionally slips up and discloses confidential information; doesn't think before responding; needs more caution. | Generally acceptable; knows who is entitled to know what; checks with manager to be sure what can be disclosed. | Very reliable; can be counted on to protect confidential info; uses good discretion when communicating. | Absolutely above reproach; is never the source of leaks; scrupulously protects confidential info from others where appropriate. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

8. **Communications Ability:** Consider oral communications and, if required, writing ability.

| Has significant difficulty understanding others; confuses people; is sloppy | Sometimes makes assumptions without the facts; may be unclear at times | Able to make self understood; does not interrupt others; reports are generally clear and concise | A good listener; asks good questions; very effective at conveying ideas. | Is clear, concise and persuasive; simplifies complex issues; very effective |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
and inconsistent times; contradicts self.
clear and concise.
very accurate and timely reports.
communicator; well prepared presentations.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
### 9. Interpersonal Skills:
Consider ability to work inclusively with co-workers, supervisors, customers and the public.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Above Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Uncooperative; frequent conflicts with others; subject of many complaints.</td>
<td>Cannot get along with some people; occasionally rude or abrupt with people.</td>
<td>Usually cooperative; works harmoniously with others.</td>
<td>Is effective team member; gets along well with people; always polite and cordial; volunteers to help others. Seeks out others for input.</td>
<td>Demonstrates genuine concern for problems and actively pursues input from others; actively encourages good public relations; has received compliments.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 10. Work Habits/Safety:
Consider whether follows work rules, adherence to politics and procedures, and safety awareness.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Above Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequently fails to carry out assigned work; wastes an inordinate amount of time; has many careless injuries.</td>
<td>Sometimes doesn't clarify assignments; doesn't keep supervisor informed; safety is not a priority.</td>
<td>Follows instructions and performs work as assigned; keeps supervisor informed of progress; does jobs in safe way.</td>
<td>Consistently follows work rules and procedures; makes constructive suggestions to improve; takes no chances with safety of others.</td>
<td>Is exemplary role model for others; very reliable on follow through; always gets the job done; actively promotes safety.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 11. Attendance:
Consider absenteeism, tardiness, use of sick leave and adherence to call-in requirements. Sick leave usage during the evaluation period was ______ hours.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Above Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excessively absent; abuses sick leave;</td>
<td>Absent more than most; late to work; higher than acceptable attendance record; uses an</td>
<td>Acceptable attendance record; uses an</td>
<td>Very reliable attendance; almost never late;</td>
<td>Exceptional record; rarely absent; has</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>almost never calls in as</td>
<td>average use of sick leave;</td>
<td>average amount of sick leave;</td>
<td>uses less sick leave than the</td>
<td>seldom been late; has high sick leave balance on books.</td>
</tr>
<tr>
<td>required.</td>
<td>sometimes does not call in on time.</td>
<td>calls in when unable to report to work.</td>
<td>average; always calls in on time.</td>
<td></td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: ____________________________

__________________________________________________________________

__________________________________________________________________
12. **Work Direction of Others:** Consider ability to plan, assign, and review the work of others.

<table>
<thead>
<tr>
<th>BELOW NEEDS</th>
<th>SATISFACTORY</th>
<th>ABOVE OUTSTANDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>STANDARD</td>
<td>IMPROVEMENT</td>
<td>AVERAGE</td>
</tr>
<tr>
<td>Fails to develop teamwork; very autocratic.</td>
<td>Does not give clear directions; avoids tough leadership issues; unit characterized by poor execution of work.</td>
<td>Provides adequate direction and review of work; performs required leadership tasks when necessary. Understands use of inclusive problem-solving.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### OVERALL RATING:

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
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<th>OUTSTANDING</th>
</tr>
</thead>
</table>

**CAREER GOALS AND OBJECTIVES:** Use the space provided below to record the employee's career advancement goals or objectives, training opportunities desired or being pursued and note any specific actions the employee will take to achieve these or what assistance/encouragement the supervisor can provide.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

**SUMMARY COMMENTS OF RATER:**

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
Date: ___________________  Rater's Signature: ____________________________
COMMENTS OF EMPLOYEE:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date:________________________  Employee’s Signature:______________________________

*The employee's signature means only that the performance evaluation was reviewed with him/her. It does not necessarily mean that he/she agrees with the evaluation. The employee may attach additional written comments if he/she wishes.

OTHER REVIEWERS:

Department Head:  Signature: __________________________  Date:_______________________

Human Resources Supervisor:  Signature: __________________________  Date:_______________________
CONTRA COSTA WATER DISTRICT
Clerical Employee Performance Evaluation Form

Name: ________________________________  Department: ________________________

Classification Title: ____________________________

Period Covered:  From ___________  To ___________

Type of Review:  ■ 3 month probationary  ■ 6 month probationary  ■ Annual

SUPERVISORS: Read the instruction sheet accompanying this form before attempting to complete this evaluation of the employee.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

1. **Office Methods and Procedures:** Consider ability to understand and apply policies and procedures.

Exhibits consistent difficulties; seldom does things the same way twice in a row.

Some deficiencies in learning or following rules; makes numerous errors.

Understands and applies procedures up to the standard expected.

Knows and uses inter-related processes including standard technical material.

Comprehends complex or highly technical material and makes almost no errors.

Comments / Suggestions for Improvement: ____________________________________________

2. **Work Organization:** Consider ability to plan and organize work and meet deadlines.

Does not follow routine methods; very disorganized;

Does routine tasks but does not plan non-routine work

Works in orderly way and uses time effectively.

Plans work well; always handles jobs systematically;

Highly organized person; prioritizes large volume of work;
often misses deadlines. 

Meets most deadlines. 

Meets most deadlines smoothly.

Comments / Suggestions for Improvement: _______________________________________________ 
__________________________________________________________________________________
### 3. **English Language Usage:** Consider knowledge of grammar, spelling, punctuation, sentence construction and the like.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frequent grammar and spelling errors; serious skill deficiencies.</td>
<td>Adequate with respect to common language usage; has difficulty with technical or non-standard words.</td>
<td>Demonstrates adequate knowledge of English language for every day usage.</td>
<td>Good command of this area; understands meaning of and spelling of common technical terminology.</td>
<td>Extremely well developed skills; seldom ever makes grammar, spelling or punctuation errors.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 4. **Typing Proficiency:** Consider speed, accuracy and extent of word processing capability.

<table>
<thead>
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<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Slow typist; makes excessive number of errors; not PC literate.</td>
<td>Speed has slipped below standards for the class; accuracy could be better.</td>
<td>Speed and accuracy meet standards for the class; familiar with basic word processing.</td>
<td>Good typist; speed and accuracy exceeds standards; proficient with PC equipment.</td>
<td>Excellent typist; noticeably superior to most others; word processing skills far exceed most.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 5. **Use of Office Equipment:** Consider familiarity with personal computers, photocopiers, FAX machines, cellular phones, 10-key adding machines, pagers, 2-way radios and the like.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is confused by office equipment; always needs help to operate.</td>
<td>Can do routine tasks but frequently has difficulty with non-standard equipment</td>
<td>Can operate most equipment with sufficient degree of efficiency and speed.</td>
<td>Above average ability; comfortable using most office equipment.</td>
<td>Extremely well qualified; can use to perform the more complex and non-standard tasks.</td>
</tr>
</tbody>
</table>
Comments / Suggestions for Improvement: ______________________________________________________
____________________________________________________________________________________
6. **Facility with Numbers:** Consider ability to make basic math calculations and familiarity with accounting concepts.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not numbers oriented; is very slow and makes multiple errors.</td>
<td>Can do basic calculations but speed and accuracy is lacking; accounting knowledge is marginal.</td>
<td>Performs calculations with acceptable level of speed and accuracy; has working knowledge of accounting.</td>
<td>Good numerical skills; likes math and can do with ease; above average understanding of accounting.</td>
<td>Excellent with numbers; always fast and accurate; can work with complicated accounting problems.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

7. **Communications Ability:** Consider oral communications and, if required, writing ability.

| Has significant difficulty understanding others; confuses people; is sloppy and inconsistent in written records. | Sometimes makes assumptions without the facts; may be unclear at times; contradicts self. | Able to make self understood; does not interrupt others; reports are generally clear and concise. | A good listener; asks good questions; very effective at conveying ideas; very accurate and timely reports. | Is clear, concise and persuasive; simplifies complex issues; very effective communicator; well prepared presentations. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

8. **Interpersonal Skills:** Consider ability to work inclusively with co-workers, supervisors, customers and the public.

| Uncooperative, frequent conflicts with others; subject to many complaints. | Cannot get along with some people; occasionally rude or abrupt with | Usually cooperative; works harmoniously with others. | Is effective team member; gets along well with people; always polite and | Demonstrates genuine concern for problems and actively pursues input from |
people. cordial; volunteers to help others. Seeks out others for input. others; actively encourages good public relations; has received compliments.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
### 9. Work Habits/Safety

Consider whether follows work rules, adherence to policies and procedures, and safety awareness.

<table>
<thead>
<tr>
<th>Frequently fails to carry out assigned work; wastes an inordinate amount of time; has many careless injuries.</th>
<th>Sometimes doesn't clarify assignments; doesn't keep supervisor informed; safety is not a priority.</th>
<th>Follows instructions and performs work as assigned; keeps supervisor informed of progress; does jobs in a safe way.</th>
<th>Consistently follows work rules and procedures; makes constructive suggestions to improve; takes no chances with safety of others.</th>
<th>Is exemplary role model for others; very reliable on follow through; always gets the job done; actively promotes safety.</th>
</tr>
</thead>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 10. Attendance

Consider absenteeism, tardiness, use of sick leave and adherence to call-in requirements. Sick leave usage during the evaluation period was _____ hours.

<table>
<thead>
<tr>
<th>Excessively absent; abuses sick leave; almost never calls in as required.</th>
<th>Absent more than most; late to work; higher than average use of sick leave; sometimes does not call in on time.</th>
<th>Acceptable attendance record; uses an average amount of sick leave; calls in when unable to report to work.</th>
<th>Very reliable attendance; almost never late; uses less sick leave than the average; always calls in on time.</th>
<th>Exceptional record; rarely absent; has seldom been late; has high sick leave balance on books.</th>
</tr>
</thead>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 11. Work Direction of Others

Consider ability to plan, assign, and review the work of others.

<p>| Fails to develop team-work; very autocratic. | Does not give clear directions; avoids tough leadership issues; unit | Provides adequate direction and review of work; performs | Plans and organizes work well; respected by staff as effective leader; | Fosters effective teamwork; a leader not a follower; studies and keeps up on N/A |</p>
<table>
<thead>
<tr>
<th>Characterized by poor execution of work.</th>
<th>Required leadership tasks when necessary.</th>
<th>Unit has high productivity and quality of work.</th>
<th>Supervisory issues.</th>
</tr>
</thead>
</table>

**Comments / Suggestions for Improvement:**

__________________________________________________________________________________

__________________________________________________________________________________
OVERALL RATING:

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
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</table>

CAREER GOALS AND OBJECTIVES: Use the space provided below to record the employee's career advancement goals or objectives, training opportunities desired or being pursued and note any specific actions the employee will take to achieve these or what assistance/encouragement the supervisor can provide.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

SUMMARY COMMENTS OF RATER:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: __________________ Rater's Signature: ______________________
COMMENTS OF EMPLOYEE:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: ___________________  Employee’s Signature: _________________________________

*The employee's signature means only that the performance evaluation was reviewed with
him/her. It does not necessarily mean that he/she agrees with the evaluation. The employee may
attach additional written comments if he/she wishes.

OTHER REVIEWERS:

Department Head:    Signature: ________________________  Date:___________________

Human Resources Supervisor:  Signature: ________________________  Date:___________________
CONTRA COSTA WATER DISTRICT

Operations & Maintenance Employee Performance Evaluation Form

Name: ___________________________ Department: ___________________________

Classification Title: ___________________________ Period Covered: From ______ To ______

Type of Review:  □ 3 month probationary □ 6 month probationary  □ Annual

SUPERVISORS: Read the instruction sheet accompanying this form before attempting to complete this evaluation of the employee.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
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<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

1. **Water Operations Principles:** Consider knowledge of water treatment and distribution system operations, including pipeline installation and inspection.

| Demonstrates lack of basic knowledge; severe technical deficiencies. | Functions at marginal level; doesn't always understand how aspects of system interrelate. | Has working understanding of water system operations; sufficient technical ability for the work; has stayed reasonably current. | Viewed as knowledgeable by peers; solid technical understanding of system operations matters. | Skills approach level of an expert; very knowledgeable about system operations; always sees the big picture. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

2. **Maintenance Practices:** Consider knowledge of mechanical, electrical, and facilities maintenance methods, materials and equipment used in the construction trades industry.

| Cannot perform basic maintenance | Can do routine work but has difficulty with | Demonstrates adequate level of skill; comfortable | Functions at the journey level; solid technical | Extremely skilled in the area of maintenance |
| tasks; lacks skill or ability for this type of work. | non-standard problems; requires frequent instruction. | in area of specialization; reasonable technical knowledge. | grounding; performs with precision & speed. | work; able to independently troubleshoot and repair unusual problems with ease. |

**Comments / Suggestions for Improvement:**

__________________________________________________________________________________

__________________________________________________________________________________

__________________________________________________________________________________
3. **Skill with Tools and Equipment:** Consider skill level with hand and power tools and specialized field or shop tools and equipment, exclusive of vehicles.

<table>
<thead>
<tr>
<th>Below Standard</th>
<th>Needs Improvement</th>
<th>Satisfactory</th>
<th>Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lacks basic skills with tools of the trade; not well coordinated.</td>
<td>Some deficiencies exist; has difficulty with some routine applications.</td>
<td>Can operate most items efficiently and uses as appropriate; good manual dexterity.</td>
<td>Performs complex tasks well; above average ability; can do some advanced tasks.</td>
<td>Extremely skillful; uses tools and equipment expertly.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________

__________________________________________________________________________________

4. **Operation of Heavy Equipment:** Consider ability to operate commercial vehicles requiring a class "A" or "B" driver's license.

| Unable to operate most field equipment; unsafe and unreliable on equipment alone. | Can operate some vehicles but not all; has difficulty on occasion with specialized equipment. | Able to operate most equipment skillfully; can use for routine jobs when necessary. | Good operator; careful, efficient and skilled; can do many non-standard tasks, has taught others to use equipment. | Very skilled and efficient; can operate virtually all equipment needed. |

Comments / Suggestions for Improvement: _______________________________________________

__________________________________________________________________________________

5. **Physical Demands of Work:** Consider ability to perform physically demanding work safely and efficiently.

| Not demonstrated abilities necessary; inadequate strength, agility or endurance. | Is unable to do some of the routine work; requires frequent assistance with physical aspects of work. | Possesses requisite strength and endurance for most tasks; in good physical condition for work demands. | Above average abilities; demonstrates physical fitness; more than enough physical ability for most tasks. | Extremely fit; capable of performing the most physically demanding tasks. |

Comments / Suggestions for Improvement: _______________________________________________

__________________________________________________________________________________
Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
6. **Numerical Ability:** Consider ability to use arithmetic and do mathematical calculations, as required by the work.

- **Severe deficiencies in basic math skills:** very slow and makes many errors.
- **Does basic calculations OK but lacks speed and accuracy:** limited knowledge of higher math.
- **Performs at an acceptable level of speed/accuracy:** working understanding and ability to use math required for the job.
- **Works easily with numbers:** good math skills; can do some advanced calculations.
- **Always fast and accurate:** does complex calculations with ease; helps others with mathematics.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

7. **Communications Ability:** Consider oral communications and, if required, writing ability.

- **Has significant difficulty understanding others:** confuses people; is sloppy and inconsistent in written records.
- **Sometimes makes assumptions without the facts:** may be unclear at times; contradicts self.
- **Able to make self understood:** does not interrupt others; reports are generally clear and concise.
- **A good listener:** asks good questions; very effective at conveying ideas; very accurate and timely reports.
- **Is clear, concise and persuasive:** simplifies complex issues; very effective communicator; well prepared presentations.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

8. **Interpersonal Skills:** Consider ability to work inclusively with co-workers, supervisors, customers, and the public.

- **Uncooperative:** frequent conflicts with others; subject of many complaints.
- **Cannot get along with some people:** occasionally rude or abrupt with others.
- **Usually cooperative:** works harmoniously with others.
- **Is effective team member:** gets along well with people; always polite and cordial.
- **Demonstrates genuine concern for problems and actively pursues input from others:** actively

Comments / Suggestions for Improvement: _______________________________________________
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<p>| | |</p>
<table>
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<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>volunteers to help others.</td>
<td>encourages good public relations;</td>
</tr>
<tr>
<td>Seeks out others for input.</td>
<td>has received compliments.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
9. **Work Habits/Safety:** Consider whether follows work rules, adherence to policies and procedures, and safety awareness.

<table>
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<th>Satisfactory</th>
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<th>Outstanding</th>
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<tr>
<td>Frequently fails to carry out assigned work; wastes an inordinate amount of time; has many careless injuries.</td>
<td>Sometimes doesn't clarify assignments; doesn't keep supervisor informed; safety is not a priority.</td>
<td>Follows instructions and performs work as assigned; keeps supervisor informed of progress; does jobs in safe way.</td>
<td>Consistently follows work rules and procedures; makes constructive suggestions to improve; takes no chances with safety of others.</td>
<td>Is exemplary role model for others; very reliable on follow through; always gets the job done; actively promotes safety.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

10. **Attendance:** Consider absenteeism, tardiness, use of sick leave and adherence to call-in requirements. Sick leave usage during the evaluation period was ______ hours.

| Excessively absent; abuses sick leave; almost never calls in as required. | Absent more than most; late to work; higher than average use of sick leave; sometimes does not call in on time. | Acceptable attendance record; uses an average amount of sick leave; calls in when unable to report to work. | Very reliable attendance record; almost never late; uses less sick leave than the average; always calls in on time. | Exceptional record; rarely absent; has seldom been late; has high sick leave balance on books. |

Comments / Suggestions for Improvement: _______________________________________________
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11. **Work Direction of Others:** Consider ability to plan, assign, and review the work of others.

<table>
<thead>
<tr>
<th>Fails to develop teamwork; very autocratic.</th>
<th>Does not give clear directions; avoids tough</th>
<th>Provides adequate direction and</th>
<th>Plans and organizes work well; respected</th>
<th>Fosters effective teamwork; a leader not a</th>
</tr>
</thead>
</table>

N/A
leadership issues; unit characterized by poor execution of work.
review of work; performs required leadership tasks when necessary.
by staff as effective leader; unit has high productivity and quality of work.
follower; studies and keeps up on supervisory issues.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
OVERALL RATING:

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

CAREER GOALS AND OBJECTIVES: Use the space provided below to record the employee's career advancement goals or objectives, training opportunities desired or being pursued and note any specific actions the employee will take to achieve these or what assistance/encouragement the supervisor can provide.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

SUMMARY COMMENTS OF RATER:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: ____________________  Rater's Signature: ____________________

COMMENTS OF EMPLOYEE:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: ____________________  Employee’s Signature: ____________________

*The employee's signature means only that the performance evaluation was reviewed with him/her. It does not necessarily mean that he/she agrees with the evaluation. The employee may attach additional written comments if he/she wishes.

OTHER REVIEWERS:

Department Head:  Signature: ____________________  Date: ________________

Human Resources Supervisor:  Signature: ____________________  Date: ________________
CONTRA COSTA WATER DISTRICT

Supervisory/Managerial Employee Performance Evaluation Form

Name: ___________________________  Department: ___________________________

Classification Title: ___________________________

Period Covered: From ___________ To ___________

Type of Review:  □ 3 month probationary □ 6 month probationary □ Annual

SUPERVISORS: Read the instruction sheet accompanying this form before attempting to complete this evaluation of the employee.

BELOW STANDARD  IMPROVEMENT SATISFACTORY  AVERAGE OUTSTANDING

1. Planning and Organizing: Consider ability to plan, schedule, and utilize resources effectively to achieve goals and objectives.

Often fails to meet deadlines; does not set goals or priorities.  Plans routine tasks in marginal way; does not anticipate many issues; crisis oriented.  Works in orderly way; usually estimates resources needed; meets most deadlines.  Manages time well; forestalls most problems by planning.  Systematically handles any job well; extremely well organized; sets objectives, prioritizes/achieves goals.

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

2. Leadership Skills: Consider ability to define and communicate objectives, delegate and supervise work, and gain the cooperation of others in accomplishing work through the use of inclusive problem-solving methods.

Actively undermines management goals, creates defensive attitudes, makes poor decisions.  Does not give clear directions to staff, poor group performance and morale.  Keeps boss informed, enforces work rules, delegates well, fosters teamwork by using interest-based or partnering.  Gives employees credit, generates enthusiasm, clearly communicates expectations.  Seeks consistently inspires loyalty and support; gets maximum productivity from others, promotes a participative approach. Actively and consistently
<table>
<thead>
<tr>
<th>Technique</th>
<th>Opportunities to expand inclusive problem-solving</th>
<th>Promotes use of inclusive problem-solving methods; is viewed as an example of “best practice”</th>
</tr>
</thead>
</table>

Comments / Suggestions for Improvement: ________________________________________________________________
__________________________________________________________________________________
3. **Analytical and Problem Solving Ability:** Consider ability to gather and analyze facts, sort out what is relevant, evaluate alternatives, and recommend reasonable solutions.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ignores problems or shifts to others; does no meaningful analysis, applies failed solutions.</td>
<td>Jumps to conclusions without facts; makes only noncontroversial decisions; sloppy or incomplete analysis.</td>
<td>Gathers relevant facts first; weighs alternatives identified; logical in thought processes; uses consistent approach.</td>
<td>Astute at identifying relevance; clearly defines problems and alternatives; solutions well reasoned.</td>
<td>Very analytical; uses creativity and imagination to solve many problems; recommendations routinely accepted.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

4. **Meeting Deadlines:** Consider ability to achieve outcomes on time and within budget, be flexible and adapt to change.

| No apparent concern for timelines; seldom prepared for meetings; late with reports. | Needs to be reminded about completion dates; can only handle one activity at a time. | Completes most work on schedule; informs supervisor when more time is needed; prompt to meetings. | Dependable and reliable; able to change priorities when necessary; meets schedules regularly. | Extremely punctual, flexible and adaptable; uses originality and resourcefulness to meet deadlines. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

5. **Employee Relations:** Consider knowledge of accepted personnel principles and ability to work through others to accomplish tasks.

| Disregards feelings of others; is a hindrance to group | Criticizes but does not praise; seldom listens to employee concerns; harsh | Treats employees fairly and with respect; listens to valid concerns; gains credibility. | Provides regular feedback; encourages participation in decisions; | Maintains and enhances self esteem; listens and responds with empathy; |
effectiveness; very authoritative.

and abrupt in manner.

promotes teamwork.

asks for help in solving problems.

Comments / Suggestions for Improvement: ________________________________________________
__________________________________________________________________________________
6. **Training and Development:** Consider extent to which the supervisor/manager encourages career growth and development amongst subordinates.

| Inhibits staff development; makes no effort to train employees. | OJT done but is not a priority; only gives feedback during annual evaluations. | Tries to develop employees where possible; provides information on training available; coaches. | Provides challenging work to stimulate; encourages employee development; seeks out training opportunities for them. | Training is a priority; regularly identifies needs and seeks ways to develop employees; actively encourages further education. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

7. **Professional / Technical Skills:** Consider level of knowledge in field of specialty and the ability to apply that knowledge in the workplace.

| Severe technical deficiencies, judgment is suspect; routinely makes serious errors. | Marginal quantity and quality of work; no plan for updating or improving out of date skills. | Performs at adequate level, skills comparable to expectations; makes reasonable efforts to stay current in field. | Peers view as very knowledgeable; sound technical/professional grounding; uses good judgment. | Recognized as expert in field; produces high quality work; takes initiative to acquire knowledge and stay current. |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

8. **Oral Communications:** Consider ability to communicate verbally.

<p>| Has significant difficulty understanding others; confuses | Sometimes makes assumptions without the facts; | Able to make self understood; does not interrupt others; oral | A good listener; asks good questions; very effective at | Is clear, concise and persuasive; simplifies complex issues; |</p>
<table>
<thead>
<tr>
<th>People</th>
<th>May be unclear at times; contradicts self.</th>
<th>Reports are generally clear.</th>
<th>Conveying ideas; very accurate and timely communication.</th>
<th>Very effective communicator; well prepared presentations.</th>
</tr>
</thead>
</table>

Comments / Suggestions for Improvement: ________________________________________________
__________________________________________________________________________________
9. **Report Writing Ability**: Consider ability to organize information and present it in writing in a clear, concise and understandable form.

<table>
<thead>
<tr>
<th>Below Standard</th>
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<th>Satisfactory</th>
<th>Above Average</th>
<th>Outstanding</th>
</tr>
</thead>
<tbody>
<tr>
<td>Avoids written communication; reports are rambling and obscure central issue; poor English usage and grammar.</td>
<td>Has difficulty expressing ideas clearly and concisely; must be prodded to write things down; uses too much bureaucratic and technical jargon.</td>
<td>Reports are understandable and factual; knows when to write things down; uses correct English grammar and spelling; reasonably well organized.</td>
<td>Written work is clear, concise and easy to understand; expresses self well in writing; very organized reports.</td>
<td>Noted for ability to write; summarizes lengthy and complex issues well; perceptive editor and consulted by others.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement:
__________________________________________________________________________________

10. **Interpersonal Skills**: Consider ability to work inclusively with co-workers, supervisors, customers and the public.

| Uncooperative; frequent conflicts with others; subject of many complaints. | Cannot get along with some people; occasionally rude or abrupt with people. | Usually cooperative; works harmoniously with others. | Is effective team member; gets along well with people; always polite and cordial; volunteers to help others. | Demonstrates genuine concern for problems and actively pursues input from others; actively encourages good public relations; has received compliments. |

Comments / Suggestions for Improvement:
__________________________________________________________________________________

11. **Work Habits/Safety**: Consider whether follows work rules, adherence to policies and procedures, and safety awareness.

| Frequently fails to carry out assigned work; wastes an inordinate | Sometimes doesn't clarify assignments; doesn't keep supervisor | Follows instructions and performs work as assigned; keeps supervisor | Consistently follows work rules and procedures; makes | Is exemplary role model for others; very reliable on follow through; always gets the |
| Amount of time; has many careless injuries. | Informed; safety is not a priority. | Informed of progress; does jobs in a safe way. | Constructive suggestions to improve; takes no chances with safety of others. | Job done; actively promotes safety. |

Comments / Suggestions for Improvement: ________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
12. **Attendance:** Consider absenteeism, tardiness, use of sick leave and adherence to call-in requirements. Sick leave usage during the evaluation period was _____ hours.

- Excessively absent; abuses sick leave; almost never calls in as required.
- Absent more than most; late to work; higher than average use of sick leave; sometimes does not call in on time.
- Acceptable attendance record; uses an average amount of sick leave; calls in when unable to report to work.
- Very reliable attendance; almost never late; uses less sick leave than the average; always calls in on time.
- Exceptional record; rarely absent; has seldom been late; has high sick leave balance on books.

Comments / Suggestions for Improvement: _______________________________________________  
_________________________________________________________________________________

**OVERALL RATING:**

**CAREER GOALS AND OBJECTIVES:** Use the space provided below to record the employee's career advancement goals or objectives, training opportunities desired or being pursued and note any specific actions the employee will take to achieve these or what assistance/encouragement the supervisor can provide.

_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________

**SUMMARY COMMENTS OF RATER:**

_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
_________________________________________________________________________________
COMMENTS OF EMPLOYEE:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
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__________________________________________________________________________________
__________________________________________________________________________________

Date:_________________________  Employee’s Signature:______________________________

*The employee's signature means only that the performance evaluation was reviewed with
him/her. It does not necessarily mean that he/she agrees with the evaluation. The employee may
attach additional written comments if he/she wishes.

OTHER REVIEWERS:

Department Head:  Signature:_________________________  Date:______________________

Human Resources Supervisor:  Signature:_________________________  Date:______________________
CONTRA COSTA WATER DISTRICT
Engineering Technician Employee Performance Evaluation Form

Name: ____________________________________ Department: ___________________________
Classification Title: ______________________________
Period Covered: From ___________ To ___________
Type of Review: ☐ 3 month probationary ☐ 6 month probationary ☐ Annual

SUPERVISORS: Read the instruction sheet accompanying this form before attempting to complete this evaluation of the employee.

<table>
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<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

1. **Office Engineering and Drafting:** Consider knowledge of the principles and practices of technical engineering support and drafting work.

Severe technical deficiencies; lacks basic drafting ability; has problems with basic tasks. | Marginal quality of work; drafting work is often sloppy or inaccurate; skills not current. | Performs at adequate level; skills comparable with co-workers; makes efforts to stay current. | Assists others in technical areas; solid grounding; does good drafting work. | Produces consistently high quality work product; skills approach level of an expert; knowledge is kept current. |

Comments / Suggestions for Improvement: ____________________________________________

______________________________________________________________________________

2. **Use of Tools, Instruments and, if applicable, CAD:** Consider ability to use drafting tools, survey instruments, reproduction equipment, calculators, computers, and (if assigned) CAD.

Unable to use some items at all and needs help | Has difficulty with routine applications; | Can operate most items efficiently and uses as | Above average ability; can perform complex | Uses equipment expertly; routinely uses
<table>
<thead>
<tr>
<th>with others; not computer literate.</th>
<th>some deficiencies exist; can only use CAD for routine tasks.</th>
<th>appropriate; has working knowledge of CAD and applies it.</th>
<th>tasks well; uses some advanced computer and CAD applications.</th>
<th>advanced computer applications.</th>
</tr>
</thead>
</table>

Comments / Suggestions for Improvement: 

__________________________________________________________________________________
3. **Mathematical Ability:** Consider ability to make engineering calculations using, if necessary, algebra, geometry and trigonometry.

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
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<th>OUTSTANDING</th>
</tr>
</thead>
<tbody>
<tr>
<td>Very slow and makes many errors; severe deficiencies in algebra and/or geometry.</td>
<td>Can do basic calculations but lacks speed and accuracy; some lack of knowledge of higher math.</td>
<td>Performs at acceptable level of speed/accuracy; working understanding of engineering math including trigonometry.</td>
<td>Good mathematical skills; likes numbers and works with easily; well versed in advanced calculations.</td>
<td>Always fast and accurate; a very numbers oriented person; does complex calculations with ease; helps others as needed.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________  
__________________________________________________________________________________

4. **Manual Dexterity and Skill:** Consider completeness, accuracy, neatness and speed in making engineering drawings.

<table>
<thead>
<tr>
<th>DRAWINGS</th>
<th>WORK PRODUCT</th>
<th>RENDERINGS</th>
<th>DRAWINGS</th>
<th>QUALITY OF OUTPUT</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflect basic lack of manual skill; serious deficiencies exist; abilities not adequate for work.</td>
<td>Sometimes not complete or accurate; quality suffers at the expense of speed.</td>
<td>Meet required standards; generally of acceptable quality; has good hand/eye coordination.</td>
<td>High quality; very neat, accurate and complete; meticulous attention to detail exists.</td>
<td>Subject of compliments; manual skills are obviously superior; has highly developed abilities in this area.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________  
__________________________________________________________________________________

5. **Field Surveying:** Consider ability to verify conditions, measurements and conformity to specifications.

<table>
<thead>
<tr>
<th>LACKS ABILITY TO DO FIELD WORK; CANNOT DO BASIC SURVEY WORK; AVOIDS REQUIRED SITE VISITS.</th>
<th>EXHIBITS SOME PROBLEMS IN THIS AREA; SLOW AND UNCERTAIN WITH NON-STANDARD SURVEY WORK.</th>
<th>PERFORMS REQUIRED FIELD INVESTIGATIONS UP TO STANDARD; EQUALLY AT HOME IN FIELD AS IN THE</th>
<th>DEMONSTRATES ABOVE AVERAGE SKILL IN THIS AREA; PRODUCES HIGH QUALITY WORK PRODUCT FROM</th>
<th>COULD EASILY DO FIELD WORK FULL TIME; MEASUREMENTS AND REPORTS OF CONSISTENTLY HIGH</th>
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Comments / Suggestions for Improvement: _______________________________________________  
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Comments / Suggestions for Improvement: ____________________________________________________

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<tr>
<td>Unable to function in this area; does not possess the necessary ability to conceptualize.</td>
<td>Can do simple work of a routine nature; can assist but not handle independently; lacks solid grounding.</td>
<td>Does design/estimating work of average complexity; not area of specialty but can hold own in most cases.</td>
<td>Demonstrates good skills in this area; looked to by others for advice and assistance; does complex calculations independently.</td>
<td>A real specialist in this area; does with high degree of technical competence; may be used as resource by engineers themselves.</td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 7. Communications Ability: Consider oral communications and, if required, writing ability.

| Has significant difficulty understanding others; confuses people; is sloppy and inconsistent in written records. | Sometimes makes assumptions without the facts; may be unclear at times; contradicts self. | Able to make self understood; does not interrupt others; reports are generally clear and concise. | A good listener; asks good questions; very effective at conveying ideas; very accurate and timely reports. | Is clear, concise and persuasive; simplifies complex issues; very effective communicator; well prepared presentations. | N/A |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________

### 8. Interpersonal Skills: Consider ability to work inclusively with co-workers, supervisors, customers and the public.

| Uncooperative; frequent conflicts with others; subject of many complaints. | Cannot get along with some people; occasionally rude or abrupt with people. | Usually cooperative; works harmoniously with others. | Is effective team member; gets along with people; always polite and cordial; | Demonstrates genuine concern for problems and actively pursues input from others; actively |

Comments / Suggestions for Improvement: _______________________________________________
__________________________________________________________________________________
volunteers to help others. Seeks out other for input. 
encourages good public relations; has received compliments.

Comments / Suggestions for Improvement: 

__________________________________________________________________________________
9. **Work Habits/Safety:** Consider whether follows work rules, adherence to policies and procedures, and safety awareness.

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<tbody>
<tr>
<td>Frequently fails to carry out assigned work; wastes an inordinate amount of time; has many careless injuries.</td>
<td>Sometimes doesn't clarify assignments; doesn't keep supervisor informed; safety is not a priority.</td>
<td>Follows instructions and performs work as assigned; keeps supervisor informed of progress; does jobs in safe way.</td>
<td>Consistently follows work rules and procedures; makes constructive suggestions to improve; takes no chances with safety of others.</td>
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</table>

Comments / Suggestions for Improvement: _______________________________________________

__________________________________________________________________________________

10. **Attendance:** Consider absenteeism, tardiness, use of sick leave and adherence to call in requirements. Sick leave usage during the evaluation period was _____ hours.

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Comments / Suggestions for Improvement: _______________________________________________

__________________________________________________________________________________

11. **Work Direction of Others:** Consider ability to plan, assign, and review the work of others.

<table>
<thead>
<tr>
<th>Fails to develop team-work; very autocratic.</th>
<th>Does not give clear directions; avoids tough leadership issues;</th>
<th>Provides adequate direction and review of work;</th>
<th>Plans and organizes work well; respected by staff as</th>
<th>Fosters effective teamwork; a leader not a follower; studies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Characteristic</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Unit characterized by poor execution of work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Performs required leadership tasks when necessary.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Effective leader; unit has high productivity and quality of work.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>And keeps up on supervisory issues.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Comments / Suggestions for Improvement:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
**OVERALL RATING:**

<table>
<thead>
<tr>
<th>BELOW STANDARD</th>
<th>NEEDS IMPROVEMENT</th>
<th>SATISFACTORY</th>
<th>ABOVE AVERAGE</th>
<th>OUTSTANDING</th>
</tr>
</thead>
</table>

**CAREER GOALS AND OBJECTIVES:** Use the space provided below to record the employee's career advancement goals or objectives, training opportunities desired or being pursued and note any specific actions the employee will take to achieve these or what assistance/encouragement the supervisor can provide.

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

**SUMMARY COMMENTS OF RATER:**

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: __________________________  Rater's Signature: ________________________________
COMMENTS OF EMPLOYEE:

__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________
__________________________________________________________________________________

Date: ____________________  Employee’s Signature: ____________________

*The employee's signature means only that the performance evaluation was reviewed with him/her. It does not necessarily mean that he/she agrees with the evaluation. The employee may attach additional written comments if he/she wishes.

OTHER REVIEWERS:

Department Head:  Signature: ____________________  Date: ____________________

Human Resources Supervisor:  Signature: ____________________  Date: ____________________
EXHIBIT I

SAMPLE DISCUSSION FORM

PERFORMANCE EVALUATION DISCUSSION

Employee: ____________________________________________

Classification: ____________________________________________

Evaluation Period: __________________________ to __________________________

(Today's date) (Formal evaluation date)

Performance Expectations and Standards Discussion - to be completed by supervisor and employee

1. Review and discuss:
   a. DISTRICT MISSION, GOALS & OBJECTIVES, and
   b. EMPLOYEE’S MAJOR JOB RESPONSIBILITIES RELATED TO MISSION, GOALS AND OBJECTIVES AND CLASS DESCRIPTION.

2. List major job responsibilities; i.e.: "Install, monitor & maintain software, including operating systems, database and communications control systems...." (list on reverse).

3. List any specific objectives (MILESTONES) to be accomplished this evaluation period (list on reverse).

   Examples:
   a. Conduct and complete RFP procedure to select new software vendor by (date).
   b. Develop new method by (date) to track adequacy of office supplies in different locations so that basic supplies will not be lacking.
   c. Develop new tracking and reporting system for claims by (date) so that information can be easily integrated into quarterly reports.

4. Discuss training needs/support and prepare a training plan (see reverse).

5. Review the attached Performance Evaluation form, which will be completed at the end of the evaluation period. Accomplishment of major responsibilities and objectives (MILESTONES) shall be evaluated using the performance factors listed on the Performance Evaluation form.

I have had a performance evaluation discussion, which included the above steps.

Employee Signature* ____________________________ Date ____________________________

*Signing this form does not necessarily mean the employee agrees with the discussion. Signature only indicates the class description, responsibilities, objectives, training, and form were discussed with the supervisor.
NOTE: Supervisor: After signing form, send copies to (1) employee, (2) supervisor, and (3) HR (Personnel File)
#1. Major Job Responsibilities:

________________________________________

________________________________________

________________________________________

________________________________________

#2. Specific Accomplishments (MILESTONES) for this Evaluation Period:

________________________________________

________________________________________

________________________________________

________________________________________

#3. Specific Objectives (MILESTONES) for upcoming Evaluation Period:

________________________________________

________________________________________

________________________________________

________________________________________

#4. Training:

Employee: To support my plans for current and future work performance, I am interested in the following kinds of training and development opportunities:

________________________________________

________________________________________

________________________________________

________________________________________

#5. Training:
Supervisor: To assist in training and development, and Milestone Accomplishments, I will try to provide the following training opportunities: