

(A) 1

Second, as a job changes and evolves during the year, there should be a mutual recognition between the staff and the supervisor that these changes have taken place and adjustments in the position description should be noted in order to facilitate a fair and coherent performance evaluation later on. Because some jobs evolve and change rapidly, more attention to this aspect of the management function of position description monitoring will be needed. However, other jobs change very little and less attention will be necessary.

Technical and Support Staff

While a position description defines the scope of a person's responsibilities and the special work assignment, these seldom cover the many other activities and relationships that are part of being a productive employee and a cooperative co-worker. The following supplementary criteria and standards are intended to be used where they may be relevant to a person's work or the description of that work in the position description.

The following categories outline areas of evaluation common to the work requirements of most technical and support staff.

- Readiness to work
 1. Punctuality (ready to work at start time).
 2. Absence from work station or not working during work hours.
 3. Missed days of work.
 4. Involved in excessive non-work related chit-chat, coffee breaks, or other non-authorized activities.
- Work habits
 1. Completes work
 - a. on own initiative,
 - b. on time,
 - c. with very few errors,
 - d. that is neat and
 - e. finishes related details like recordkeeping, filing, clean-up etc.
 2. Takes initiative
 - a. to start work,
 - b. to set work priorities that complement goals of the department,
 - c. on other work that needs to be done.
 - d. to help others when time permits,
 - e. to make suggestions for improving procedures, etc.
 3. Housekeeping
 - a. Keeps own work area clean and neat.
 - b. Contributes to the orderly maintenance of the general area by returning materials to their proper storage place, etc.
 - c. Reports broken equipment, etc.

Managers or Administrators

Instructions

Following are 76 statements which may describe the performance of a manager. Some of the statements are positively stated, some are negatively stated. Please read each statement carefully. Using the scale listed below, score each statement in the parentheses provided.

Scale

- 1 = I *strongly agree* that this statement describes this individual.
- 2 = I *agree* that this statement describes this individual.
- 3 = I *partly agree and partly disagree* that this statement describes this individual.
- 4 = I *disagree* that this statement describes this individual.
- 5 = I *strongly disagree* that this statement describes this individual.
- NR = This statement is *not relevant* to this individual.
- II = There is *insufficient information* on which to describe this individual.

The most common errors made in rating performance are:

- Not enough information to make a factual response to a specific statement.
- Consistent error—describes someone either too leniently or too harshly.
- Halo effect—describes individual according to a summary judgment based on one or two behaviors, i.e., all good or all bad.
- Logical rating error—assumes similar statements must logically be answered identically. (Each statement is independent.)
- Central tendency—no number 1's or 5's.
- Situational error—behavior not observed or too infrequently to be representative.
- One dramatic incident—allowing one incident to override all others when describing an individual.

If there is a specific instance which will help explain what you mean by your rating on a particular statement, make a notation after the statement in the space provided in order to give the individual concrete examples to help the person understand the meaning of your rating.

For example:

Delegates authority to his or her subordinates:

"Executive Committee progress reports tend to be late because it seems the Director is writing these

reports himself rather than having the responsible project person write the reports.”

A. Openness to Influence

- 1. Objects to ideas before they are explained.
- 2. Refuses to accept suggestions or advice from others.
- 3. Tries to avoid criticism by blaming others for his or her mistake.
- 4. Tends to approach things in his or her own way while outwardly agreeing to new methods.

B. Constructive Initiative

- 5. Takes the initiative in group meetings.
- 6. Offers constructive ideas to others outside his or her own organizational unit.
- 7. Attempts to expand technical or administrative knowledge in areas where he or she is not fully competent.
- 8. Communicates his or her ideas with conviction.

C. Priority Setting

- 9. Is unable to distinguish between important and unimportant problems.
- 10. Consciously establishes priorities in his or her work.
- 11. Establishes priorities and takes action on the basis of the importance of the problem.
- 12. Considers alternative courses of action before arriving at a final decision.

D. Work Accomplishment

- 13. Has difficulty in meeting project deadlines.
- 14. Needs to be “pushed” to get job finished.
- 15. Performs a large amount of work in the time available.

E. Thoroughness and Accuracy

- 16. Gives sufficient attention to detail when seeking problem solutions.
- 17. Is accurate in his or her work.
- 18. Uses a scientific approach to problem solution (i.e., observe, analyze, evaluate, decide, implement, follow-up).
- 19. Is not thorough in approach to work assignments.
- 20. Makes unwarranted or illogical assumptions in solving problems.

F. Formal Communications

- 21. Gives poor presentations.
- 22. Uses a steady, dull monotone in his or her speech.
- 23. Speaks clearly and concisely before groups.
- 24. Prepares incomplete records.

G. Organizational Perspective

- 25. Sees his or her problem in light of the problems of others (i.e., does not limit his or her thinking to his or her own position or organizational unit).
- 26. Gets people outside his or her own staff to work with him or her.
- 27. In making decisions for the unit or department, he or she keeps the objectives of the chamber in mind.
- 28. Communicates with other departments or people who have an interest in (or share a part of the responsibility for) the issue.

H. Credibility

- 29. Has the confidence of his or her superiors.
- 30. Has the confidence of his or her peers.
- 31. Has the confidence of his or her subordinates.
- 32. Has the confidence of volunteers with whom he or she interacts on a task basis.

I. Collaboration

- 33. Offers constructive ideas both within and outside his or her own job.
- 34. Provides assistance and guidance to others.
- 35. Goes beyond the bare requirements of his or her job with working on assigned projects.

J. Decisiveness

- 36. Will take initiative when others are hesitant to do so.
- 37. Hesitates to make decisions.
- 38. Will act on his or her own initiative when confronted with a problem.
- 39. Works well under pressure.
- 40. Uses good judgment in difficult situations.

K. Flexibility

- 41. Will attempt new methods and not limited by old ways of doing things.
- 42. Adapts readily to new situations.
- 43. Does not keep up with current developments in his or her field.
- 44. Is enthusiastic in carrying out new work assignments.

L. Subordinate Participation

- 45. Involves subordinates in decision-making process.
- 46. Permits subordinates to participate in decision-making when appropriate.
- 47. Consults with subordinates in setting their performance objectives.
- 48. Delegates authority to his or her subordinates.

M. Support for Chamber

- 49. Takes action to reduce operating budgets in time of general economic decline.
- 50. Builds a favorable attitude towards the chamber.
- 51. Expects appropriate benefits and values for money spent.
- 52. Makes a special effort to explain methods to those who do not understand them.

N. Team Building

- 53. Has the confidence of subordinates.
- 54. Molds a cohesive work group.
- 55. Inspires enthusiasm for a project among subordinates.
- 56. Budgets time to allow for sufficient direct contact with subordinates.
- 57. Holds regular briefing sessions with subordinates.

O. Control

- 58. Fails to follow-up on work assignments given to others.
- 59. Fails to take action when errors or faulty work are observed in his or her subordinates.
- 60. Permits subordinates to make poor presentations before other organizational units or higher level management.
- 61. Maintains necessary discipline.

P. Unit Improvement

- 62. Has a program of work for the unit or department.
- 63. Works closely with subordinates who lack motivation.
- 64. Provides incentives for improving performance.
- 65. Offers creative and logical suggestions to higher management for improving the chamber's operations.
- 66. Establishes definite short-range goals for the unit or department.

Q. Supportiveness

- 67. Builds confidence in subordinates by supporting their actions.
- 68. Understands the capabilities and limitations of his or her subordinates.
- 69. Selects and places qualified personnel.
- 70. Gives adequate instructions to subordinates when new methods are initiated or new work assigned.

R. Unit's Productivity

- 71. His or her subordinates accomplish a large amount of work.

- 72. Maintains a high level of quality in the work of his or her subordinates.
- 73. His or her subordinates tend to be lax in their work, even to the point of poor quality results.

S. Conflict Resolution

- 74. Takes action to settle conflicts among subordinates.
- 75. Communicates objectives of the company and his or her organizational unit to subordinates.
- 76. Helps subordinates settle their differences.
- 77. Communicates with subordinates by providing vital information affecting the unit or department.

Conclusion

A performance evaluation system that treats the employee with dignity and as an adult is a constructive force for building organizational esprit-de-corps. A performance evaluation system which takes the job of the chamber's work seriously is its evaluation procedures is also a strong factor in building esprit-de-corps. This performance evaluation system provides the structure for achieving both those objectives.

A word of caution. Every management system needs to be monitored and evaluated. A performance evaluation system is no exception. Supervisors need training and monitoring in their carrying out of their performance evaluation responsibilities. One of the best methods for ensuring a high standard and the continuity of application of a system is to have the chamber executive set a standard through his or her example of conducting thorough and even-handed performance evaluations of his or her key managers. Second, if the chamber executive considers the results of performance evaluations important and uses them for helping set salary increases, the performance evaluation system will take on a special saliency for all involved.

Summary of Key Concepts

- Consistency and coherence. Fairness and dignity. These linked concepts are several of the most important criteria employees use to judge the health of an organization.
- A performance evaluation system is part of a complex set of linkages which, if properly implemented, are internally consistent and, hence, coherent.
- Consistent quality control of staff performance is critical to chamber performance over the long pull.
- The courts are frowning with increasing severity on employers who adopt imposing and complex evaluation formulas for their staff, but whose management systems are designed to achieve fairness.

7/29/80
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Employees Performance Evaluation

NAME _____

POSITION _____

DEPARTMENT _____

EVALUATION DATE _____

PERFORMANCE RATING LEVELS

100 - OUTSTANDING - Performance far exceeds standards. Exceptional producer!

70 - SATISFACTORY - Most often meets standards. Needs some guidance. Does job reasonable well.

90 - VERY GOOD - Considerably above standards. Needs minimal direction or supervision. Accomplishes more than expected.

60 - BELOW AVERAGE - Difficulty in meeting performance standards. Has performed task long enough to have shown better performance. Needs improvement.

80 - GOOD - Fully satisfies performance requirements. Needs little follow-up. Completes work on schedule.

50 - UNSATISFACTORY - Performance is below minimum requirements. Does not show the drive or know-how to do the job. Unacceptable.

CRITERIA BASED PERFORMANCE FACTORS: Please review the job description and evaluate based on the 6 most important job tasks and duties.

JOB DESCRIPTION ITEM NUMBER	SCORE	COMMENTS
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____
4. _____	_____	_____
5. _____	_____	_____
6. _____	_____	_____

GENERAL PERFORMANCE FACTORS: Please use the same Performance Rating Levels that were used on page one.

1. **JOB KNOWLEDGE:** Consider knowledge of work gained through experience and training, participation in in-service training and continuing education.
Score _____ Comments _____

2. **QUALITY OF WORK:** Consider neatness and level of accuracy.
Score _____ Comments _____

3. **PRODUCTIVITY:** Consider the volume of work, and end results compared to the goals established.
Score _____ Comments _____

4. **DEPENDABILITY:** Consider attendance, punctuality, as well as reliability and persistence in following through with assignments.
Score _____ Comments _____

5. **INITIATIVE:** Consider willingness to begin assignments without direction, use of creativity and imagination, and follow through on tasks.
Score _____ Comments _____

6. **COOPERATION:** Consider acceptance of assignments and suggestion, ability to follow proper channels of communication, effectiveness of communication with supervisors and co-workers, and concern for customers.
Score _____ Comments _____

7. **APPEARANCE:** Consider cleanliness, neatness, and compliance with the chamber dress code.
Score _____ Comments _____

8. **WORK HABITS:** Consider compliance with departmental and chamber policies and procedures (especially confidentiality), and observations of proper safety habits.
Score _____ Comments _____

OVERALL APPRAISAL

Major Weak Points

Major Strong Points

- 1. _____
- _____
- 2. _____
- _____
- 3. _____
- _____

- 1. _____
- _____
- 2. _____
- _____
- 3. _____
- _____

Suggestions for Improvement: _____

Employee Comments: _____

Employee Signature _____ Date: _____

The Employee signature does not indicate agreement but verifies that the appraisal has been reviewed with him/her.

Evaluated By _____ Date: _____

Department Head _____ Date: _____

EMPLOYEE PERFORMANCE EVALUATION

INSTRUCTIONS

A standard Employee Performance Evaluation form will be used for all employees to determine merit increases. This form will reflect all general and criteria based standards for each position.

General Performance Standards will be the same for all employees. Criteria Based Standards will be established and approved by the President. These will be limited to six items.

Supervisors will score each standard on a scale of 50 to 100, where 50 is Unsatisfactory and 100 is Outstanding. The scores for each rating are as follows:

- 100- Outstanding
- 90- Very Good
- 80- Good
- 70- Satisfactory
- 60- Below Average
- 50- Unsatisfactory

The definition of each of the above ratings is listed on the Employee Performance Evaluation form.

Merit increases will be based 40% on General Standards, and 60% on criteria Based Standards of performance, A merit increase will only be awarded for satisfactory performance or better. Satisfactory performance is an average score of 70 or better (total weighted average).

The total merit increase achievable will be determined by the Managing director on an annual basis. Merit increases based on Employee Performance Evaluation forms will be calculated using the formula on the last page of the form.