

ANNUAL EMPLOYEE ASSESSMENT

INSTRUCTIONS: Complete this form and return the original to the departmental payroll clerk.

Retain original in Departmental Personnel File with a copy to the employee.

1. Employee's Name (First, MI, Last):		2. Employee ID:		
3. Job Title:		4. Department/Division:		
5. Appointment Date (to this position):		6. Salary Anniversary Date:		
<p>7. Listed below are the factors on which you are to assess the employee. Next to each factor are examples that describe performance at the MEETS JOB REQUIREMENTS level. These are provided as reference points for assessing performance. Indicate your rating for each factor by placing an "X" in the boxes provided. Comments should be recorded in the boxes in items 7A through 7E, 8A and 8B for any factors that are rated <i>NEEDS IMPROVEMENT</i>. Attach additional page(s) as necessary.</p>				
O = OUTSTANDING MJR = MEETS JOB REQUIREMENTS NI – NEEDS IMPROVEMENT				
Factor	"MEETS JOB REQUIREMENTS" Standards and Expectations	O	MJR	NI
A. PRODUCTIVITY	<ul style="list-style-type: none"> ▪ Manages own time and uses appropriate work methods, techniques, and equipment to achieve the most effective and efficient result in the time available. ▪ Demonstrates skill and proficiency in carrying out assignments. ▪ Work product is accurate, thorough and effective, and meets quality standards. ▪ Work output matches expectations within established timelines. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7A. Comments:				
B. KNOWLEDGE	<ul style="list-style-type: none"> ▪ Understands the needs and requirements of the job and applies skills and knowledge to perform the job competently. ▪ Understands the purposes, objectives, practices and procedures of the department. ▪ Demonstrates understanding of job procedures, methods, facts, and information related to assigned work. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7B. Comments:				
C. INITIATIVE	<ul style="list-style-type: none"> ▪ Plans, organizes and prioritizes workload with little or no assistance. ▪ Offers suggestions on improving work methods and procedures. ▪ Willingly accepts suggestions for improvement and occasionally seeks counsel on performance and work habits. ▪ Accepts additional challenges and responsibilities, and adapts to changes. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7C. Comments:				
D. DEPENDABILITY	<ul style="list-style-type: none"> ▪ Accepts responsibility for completing assignments and meeting deadlines. ▪ Reliably completes assignments on time with minimal follow-up from supervisor. ▪ Consistently punctual and regular in attendance and follows policy when requesting and reporting time off. ▪ Practices workplace safety rules and procedures on a consistent basis. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7D. Comments:				
E. INTERPERSONAL RELATIONSHIPS	<ul style="list-style-type: none"> ▪ Establishes and maintains effective and productive working relationships with peers. ▪ Works cooperatively with supervisor(s) and as part of a team. ▪ Builds and maintains customer satisfaction by responding to the needs of internal and external customers. ▪ Readily accepts and applies constructive feedback to improve job performance. 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7E. Comments:				
8. Up to two additional factors specifically related to the position may be added at the discretion of the Department. Those factor(s) are listed under 8A and 8B, along with examples that describe the MEETS JOB REQUIREMENTS level of performance. Additional factors must be applied for all employees holding the same job classification within the Department.				
A. OTHER FACTOR	<ul style="list-style-type: none"> ▪ 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8A. Comments:				
B. OTHER FACTOR	<ul style="list-style-type: none"> ▪ 	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8B. Comments:				
9. Does this employee have any disciplinary action, or has this employee been on a performance improvement plan (PIP), within the six-month period immediately preceding the salary anniversary date? If yes, a new salary anniversary date must be established. <input type="checkbox"/> No <input type="checkbox"/> Yes				
10. In view of the performance of the employee rated above:				
<input type="checkbox"/>	I certify that the employee is considered to be in good standing and therefore is eligible for a salary adjustment, or a lump payment (if over or near the maximum of the pay range).			
<input type="checkbox"/>	The employee is not currently considered to be in good standing and should not receive a salary adjustment. The employee has been notified of the deficiencies and has been counseled regarding improvement needed. Employee has been notified of the procedure to request an internal Departmental Administrative Review.			
SUPERVISOR (PRINT NAME)		SIGNATURE		TITLE
				DATE
DEPARTMENT HEAD (PRINT NAME)		SIGNATURE		TITLE
				DATE
Employee signature acknowledges receipt of the Annual Employee Assessment				DATE

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INSTRUCTIONS FOR SUPERVISORS/MANAGERS

Background

Common Council File #151209, approved on December 10, 2015 recommends changes to the Salary Ordinance that will allow the Department of Employee Relations to create and administer salary adjustment provisions in 2016 for City of Milwaukee employees who have been excluded from pay progression practices allowed under career ladders created in 2012 and beyond or employees covered by provisions of labor agreements. The recommended changes are designed to address the following critical needs:

1. Establish pay progression practices that will assist the city compete for top talent to fill vacant positions;
2. Improve retention rates of recent hires and reduce turnover of fully trained contributors;
3. Continue the implementation of pay practices that recognize employee contributions and performance standards (instead of length of service); and,
4. Minimize pay differentials created by years of frozen wages among employees performing similar work at comparable levels of proficiency.

Employees eligible for a salary adjustment under this Ordinance include two employee groups based on where the pay range for the position falls within the Salary Ordinance:

Group A	Group B
Section 3 – Technicians	Section 1 – Officials & Administrators
Section 5 – Paraprofessionals	Section 2 – Professionals
Section 6 – Administrative Support	Section 4 – Protective Service
Section 7 – Skilled Craft	Non-represented
Section 8 – Service and Maintenance	

The Annual Employee Assessment form is to be used by supervisors to assess employees whose positions are within Group A, as identified above. A separate assessment tool will be used to evaluate employees in Group B.

Eligibility

Regularly appointed City employees who have passed probation in their current position and have established a salary anniversary date in that position. Salary anniversary dates are established upon completion of twenty-six (26) pay periods of actual service after appointment to the position. For the year 2016 only – an employee who has received discipline and/or been on a performance improvement plan (PIP), will have the opportunity to re-establish their salary anniversary date upon successful completion of six months after the last disciplinary action or successful completion of the PIP.

Assessment

The annual assessment of the employee is based on the performance level of the employee during the six month period immediately preceding the employee's salary anniversary date. Examples of satisfactory performance levels on the front of the form should be benchmarks to assess job performance.

Assessment Factors

Five standardized assessment factors have been provided on the form. Up to two additional factors specifically related to the

position may be added at the discretion of the Department. Those factor(s) are to be identified under 8A and 8B, along with examples that describe the MEETS JOB REQUIREMENTS level of performance. *Additional factors must be applied for all employees holding the same job classification within the Department or Division.*

Procedure

Study the instructions and behavioral examples for the performance factors. Prepare for the assessment by obtaining documentation such as informal notes, input from other supervisors, or productivity numbers.

At or near the employee's Salary Anniversary Date, rate the employee in terms of their demonstrated performance. Discuss the performance with the employee and provide feedback and suggestions about performance improvement, where needed. Allow the employee to ask questions and assure that he/she understands the requirements for successful performance.

At the end of each assessment session the employee must sign at the bottom of the form to indicate that you have discussed the performance and expectations. The initialing indicates that the assessment was reviewed, not that there is implicit agreement with the assessment.

Other documentation to show a record of on-going discussions with the employee may be attached to the form.

Ratings

OUTSTANDING (O) – Performance at this level is superior. Performance always exceeds standard and expectations of the position.

MEETS JOB REQUIREMENTS (MJR) – Performance consistently meets the standards and expectations of the position.

NEEDS IMPROVEMENT (NI) – Performance on the job is inadequate and does not consistently meet the standards and expectations of the position.

Note: any rating of "NI" must be substantiated by a written statement.

Processing

After the discussion with the employee, distribute the completed and signed form as indicated at the top of the form.

Administrative Review

Any employee who has been denied a salary adjustment is to be provided with the opportunity to discuss that denial with a departmental designee (HR representative or a manager just above the chain of command). Departments must develop an internal administrative review process and notify affected employees of such.

Questions? Contact your department's Human Resources Office or the Department of Employee Relations on 414.286.3394