



EXEMPT EMPLOYEE PERFORMANCE EVALUATION FORM INSTRUCTIONS

INTRODUCTION

The Exempt Employee Performance Evaluation form has been designed for use with all exempt classified and unclassified professional, technical, confidential and SESII employees that are exempt from the Fair Labor Standards Act (FLSA). The County's performance management process is used to establish individual employee performance expectations through goal setting and provide written feedback on employee performance through evaluation.

The specific objectives of the process are to:

- a. Provide a method for identifying and clarifying the work that needs to be accomplished through the use of goal setting
- b. Provide a basis for regular performance evaluation and review
- c. Provide written communication, feedback, measurement and evaluation of how well employees are performing the duties of their positions
- d. Identify training and job experience needed to maintain and improve job-related knowledge, skills and abilities
- e. Provide a tool to make continued employment decisions
- f. Establish goals or objectives for the following year.

The evaluation form will be filed in the employee's Official Personnel File in the Human Resources Department. For assistance regarding Employee Identification contact the Human Resources Department (HRIS staff), and for assistance with the administration of the form contact the (Employee Relations staff).

EMPLOYEE IDENTIFICATION

Please complete with employee name, employee identification number, department/division class (job title), anniversary date, rating period and type of evaluation.

The Anniversary Date is defined as:

- a. The date employee was hired
- b. The last date employee was promoted into the current position
- c. The adjusted date due to LWOP or layoff of the employee.

The Rating Period is July 1 of the previous calendar year until June 30 of the current calendar year.

The Type of Evaluation is defined as:

- a. Annual – the anniversary date of the employee or the identified period established and directed by management.
- b. Close-out – when the employee leaves a department of the BCC, but remains in the same job classification in another department – the releasing department will prepare the evaluation and forward to the receiving department within 30 days of the employee leaving. A close-out evaluation may also be completed on employees who are separating from service with the County.
- c. Probationary – upon completion of an established probationary period (initial or promotional).

EVALUATION RATINGS

RATING	RATING DEFINITION	POINT VALUE	OVERALL RANGES
Outstanding	Consistently exceeds the performance standard.	5	4.50-5.00
Exceeds	Consistently meets and often exceeds the performance standard.	4	4.00-4.49
Meets	Performs at the performance standard.	3	3.00-3.99
Needs Improvement	Occasionally meets the performance standard, seldom exceeds and often does not meet the performance standard.	2	2.00-2.99
Unsatisfactory	Consistently does not meet the performance standard.	1	1.00-1.99

SECTION I. INDIVIDUAL PERFORMANCE STANDARDS

Department Directors should establish guidelines and measures on the Individual Performance Indicators for all employees in the department. All employees will be evaluated for items 1-7. Supervisors will be also be rated on performance indicator eight (8). **Do not mark the Supervisory Standard unless the employee being rated has supervisory responsibilities. The rating cannot be deleted once it has been selected unless the entire form is cleared.** These are standard indicators for all employees and should not be changed by the department. Rate the employee's performance for each Individual Performance Indicator listed. Enter the number of indicators rated in the space provided. The total for all columns and the average score will automatically calculate.

SECTION II. INDIVIDUAL GOALS AND OBJECTIVES

Department Directors/supervisors and employees should establish goals and objectives for the employee's Individual Goals and Objectives. These goals and objectives should be tied to the goals and objectives of the Department. Because of space limitations, list the title and/or name of the goal instead of a description. A description of the goals and objects may be attached.

Rate the employee's performance for each Individual Goal and Objective listed. Enter the number of goals and objectives rated in the space provided. The total for all columns and the average score will automatically calculate.

SECTION III. OVERALL EVALUATION

The Overall Evaluation is the score derived from the assessment of the employee's performance with regard to the Individual Performance Standards and the Individual Goals and Objectives. The average scores for Section I and Section II will automatically populate. The Total Average Score and the Overall Average Score will automatically calculate. Check the box where the value of the Overall Average Score is represented.

SECTION IV. RATER COMMENTS

The Supervisor/Rater should complete comments regarding the evaluation. If additional space is needed, it should be submitted as an attachment. Written comments by the Supervisor/Rater are required when an employee's performance is rated Needs Improvement, Unsatisfactory, Exceeds or Outstanding in Sections I, II, and III. These comments should give specific examples or describe specific actions that justify the rating.

SECTION V. EMPLOYEE COMMENTS

This section is optional for the employee. If additional space is needed, it should be submitted as an attachment.

SECTION VI. SIGNATURES

The Rater and the Department Director should initially meet to discuss and concur with the proposed ratings. The Rater should then review the evaluation one-on-one with the employee. The employee should sign and date the evaluation form to acknowledge the fact that their performance rating has been discussed with them. Signature by the employee does not necessarily mean that the employee agrees with the rating(s). If the Rater or the employee requires additional space for comments, it should be submitted as an attachment.