



TOWN OF SOMERS

PERFORMANCE MANAGEMENT PLANNING SYSTEM

PLANNING AND APPRAISAL RECORD

EMPLOYEE NAME		
TITLE	SIGNATURE	DATE
DEPARTMENT		
RATING PERIOD: FROM		TO
DIRECTOR/SUPERVISING MANAGER		
TITLE	SIGNATURE	DATE

PURPOSE OF THE PERFORMANCE MANAGEMENT PLANNING SYSTEM

- **facilitate joint planning between an exempt-level employee and director/supervising manager on what the employee is expected to accomplish.**
- **establish clear, achievable, measurable, results-oriented performance objectives, consistent with the agency's priorities and mission, and considered fair by both the exempt-level employee and the director/ supervising manager.**
- **promote ongoing communication between the exempt-level employee and the director/supervising manager concerning expectations, how well the employee is meeting these expectations, and what steps must be taken to ensure that objectives are met.**
- **guide regular evaluations of progress and promotion of the exempt-level employee's professional development. Identify corrective action needed when the employee has not accomplished a performance objective.**
- **provide a basis for differentiating among levels of performance and thus serve as a basis for an incentive salary increase or bonus payment (increase/bonus applies only to employees not under a collective bargaining agreement).**
- **improve individual job performance and thereby increase the quality and effectiveness of town services.**

PLANNING AND EVALUATION RECORD

GOALS AND OBJECTIVES - THE PLANNING PROCESS

The director/supervising manager, together with the exempt-level employee, will list the employee's performance objectives for the fiscal year in order of priority. Each objective should state what the employee plans to accomplish given the department's and the town's goals for the period, identify performance measures to determine whether the objectives are accomplished, and specify the target date for completion.(Use additional sheets if necessary.)

PRIORITY NO.	TARGET DATE	OBJECTIVE
OBJECTIVE (continued)		

CONSTRAINTS

PERFORMANCE MEASURES

PRIORITY NO.	TARGET DATE	OBJECTIVE
OBJECTIVE (continued)		

CONSTRAINTS

PERFORMANCE MEASURES

PRIORITY NO.	TARGET DATE	OBJECTIVE
OBJECTIVE (continued)		

CONSTRAINTS

PERFORMANCE MEASURES

PRIORITY NO.	TARGET DATE	OBJECTIVE
OBJECTIVE (continued)		

CONSTRAINTS

PERFORMANCE MEASURES

PLANNING AND EVALUATION RECORD

PROGRESS REVIEW - THE COMMUNICATION PROCESS

In addition to informal discussions of progress, the director/supervising manager should periodically review the progress toward meeting objectives set by each exempt-level employee. Quarterly reviews are recommended. The purpose of this discussion is to review accomplishments, identify obstacles, determine appropriate future actions, and, if necessary, to revise objectives.

PRIORITY NO.	FIRST QUARTER	SECOND QUARTER	THIRD QUARTER	FOURTH QUARTER
ACTIONS STEPS TAKEN and/or ADJUSTMENTS NEEDED				
Emp. And Supv. Initials Date				

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ACTIONS STEPS TAKEN and/or ADJUSTMENTS NEEDED				
Emp. And Supv. Initials Date				

ANNUAL REVIEW - THE EVALUATION PROCESS

The director/supervising manager will determine, after discussion with the exempt-level employee, the final performance rating for each objective and the composite rating. It is important to note that each composite rating must be finally considered in the context of all other town exempt-level employees.

RATING DEFINITIONS

Exceeds Expectations	Reserved for those exempt-level employees whose achievements substantially exceed acceptable performance levels. Objectives and job requirements are met in all areas. Quality of results is superior.
Meets All Expectations	Achieves all objectives and job requirements. Competent in all responsibilities of the position. Requires minimal direction.
Needs Improvement	Objectives and job requirements are not fully achieved. Requires substantial direction. Employee may be developing in the position.
Unsatisfactory	Objectives and job requirements are not achieved. Requires continuous direction. Overall performance is unacceptable.

OBJECTIVE (Listed by Priority #)	Exceeds Expectations	Meets All Expectations	Needs Improvement	Unsatisfactory

SIGNATURES (Employee's signature confirms report was discussed with supervisor. It does not indicate approval of Rating.)	SIGNED (Employee)			Date				
	SIGNED (Director/supervising manager)			Date				
	SIGNED (First Selectman or HR Designee)			Date				
COMPOSITE RATING (Check One)	<input type="checkbox"/>	Exceeds Expectations	<input type="checkbox"/>	Meets All Expectations	<input type="checkbox"/>	Needs Improvement	<input type="checkbox"/>	Unsatisfactory

COMMENTS