
**VILLAGE OF SUGAR GROVE
BOARD REPORT**

TO: VILLAGE PRESIDENT & BOARD OF TRUSTEES
FROM: MATT ANASTASIA, FINANCE DIRECTOR
SUBJECT: DISCUSSION: EMPLOYEE PERFORMANCE EVALUATIONS FORMS 2024
AGENDA: NOVEMBER 5, 2024 REGULAR BOARD MEETING
DATE: OCTOBER 28, 2024

ISSUE

Shall the Village Board discuss the Employee Performance Evaluation process and forms.

DISCUSSION

Each Calendar year, Department Heads and Village Administrator are required to complete an annual performance evaluation of each employee within their department. This process and employee evaluation form has not been reviewed in depth in over 10 years. Village Administrator Koepfel and I wanted to create a more robust performance evaluation that we have used in the past, as this is also part of my Initiatives for FY2024-2025.

A survey was conducted of surrounding communities to see what type of process and forms are used for their annual evaluations. It was determined most communities use a rating type system for different aspects of job performance. A sample of what the Staff is recommending moving to is attached for review, along with the old Performance Evaluation questionnaire used in the past. This is also the proposed evaluation form to be used by the Board when evaluating the Administrator.

COST

There is no cost to discussing the Employee Performance Evaluation form.

RECOMMENDATION

That the Village Board discuss the Employee Evaluation Form and provide feedback to Staff.



Employee Name		Review Period	
Department		Job Title	

Annual Performance Review

Please rate each of the performance factors on this form as one of the following:

- | | |
|------------------------------|--|
| <u>Exceptional</u> - 5 | Consistently achieves results that surpass the requirements of the position while requiring little or no guidance and supervision. The employee often proactively seeks out and engages him/herself in responsibilities surpassing standard position requirements. |
| <u>Exceeds Standard</u> - 4 | Achieves results that always meet or frequently surpass the requirements of the position while requiring only minimal guidance and supervision. |
| <u>Achieves Standard</u> - 3 | Achieves results that meet the requirements of the position while requiring general guidance and supervision. |
| <u>Below Standard</u> - 2 | Meets the requirements of the position in part, but needs improvement to further develop skills and aspects of performance. Employee requires more than general guidance and supervision. |
| <u>Unsatisfactory</u> - 1 | Employee consistently does not meet the minimum requirements of the position. Employee is placed on probation and corrective action steps must be taken by the employee to maintain continued employment. |

Section 1: Performance Outcomes:

The overall level of position knowledge, skills and abilities and the resulting performance outcomes as a result.

Job Knowledge/Competency

Rating: Choose an item.

The extent to which the employee understands duties, responsibilities, has the ability to use materials needed, and has the level of proficiency, via demonstrated knowledge, skills, and abilities, required to accomplish the work. Does the employee demonstrate a level of knowledge and/or skills to produce the amount and quality of work expected of the position? Does the employee have the ability to work independently to perform duties? Does the employee understand the expectations of his/her job? Does the employee remain current on any new developments, trends, or changes in his/her area of responsibility? How would you rate the employee's technical skills? Does the employee understand the "big picture" consequences of responsibilities when making daily decisions?

Productivity

Rating: Choose an item.

The volume of acceptable work produced/performed by the employee. Does the employee manage his/her work efficiently and effectively? Are the speed and consistency of output, time utilization and results satisfactory? Does the employee complete his/her work by or before deadlines? Does the employee work at a steady pace regardless of environmental pressure? During his/her work day/hours, does the employee limit his/her personal use of work time, resources, equipment and materials?

Quality of Work

Rating: Choose an item.

The accuracy, neatness, thoroughness, and dependability of work produced/performed by the employee. Does the work performed by the employee meet the quality standards established for his/her position? Is correction frequently necessary? Does the employee correct errors or question inconsistencies in work assigned? Does the employee

organize work to make the job easier and perhaps their supervisor's job easier? If applicable, does the employee exercise appropriate confidentiality regarding Village plans and employees?

Supervisor Comments

If employee received a 5, 2 or 1 in above section, please explain reasoning why.

Section 2: Job Commitment:

The overall level of commitment and adaptability the employee demonstrates for the strategies and goals of the Village.

Customer Focus

Rating: Choose an item.

The extent to which the employee understands the importance of quality customer service in performing his/her duties and responsibilities. Does the employee anticipate, meet, and/or exceed customer needs in a timely and courteous manner? Does the employee put him/herself in the customer's situation and, in turn, provide the quality of customer service that he/she would expect from a Village of Sugar Grove employee? Does the employee truly listen to the needs of the customer and then, within policy and procedure, resolve the situation to satisfy the customer to the extent possible?

Initiative/Commitment

Rating: Choose an item.

The extent to which the employee demonstrates personal responsibility, creativity, acceptance of work assignments and leadership, and makes intelligent decisions when performing duties. Does the employee demonstrate an acceptable level of ownership/commitment to achieve the expected level of results? Does the employee have the ability to be self-directed in performing his/her work? Does the employee request or obtain information needed to complete his/her responsibilities? Does the employee request and/or assume extra work on his/her own initiative? Does the employee seek out new and better ways of accomplishing a task? Does the employee actively seek out new and different responsibilities? Does the employee follow up when appropriate to the situation?

Adaptability/Resourcefulness

Rating: Choose an item.

The ability to adjust to change with a minimum of disruption to productivity. The ability to identify and analyze issues, formulate alternative solutions and/or contribute useful ideas in the performance of the position. Does the employee demonstrate acceptance of change as appropriate to the position? Does the employee appropriately assess the importance, urgency and risk associated with each situation and take actions that are timely and in the best interest of the Village? Does the employee adhere to budget limitations and look for ways to decrease costs?

Supervisor Comments

If employee received a 5, 2 or 1 in above section, please explain reasoning why.

Section 3: Relationships:

The demonstrated ability to establish and maintain effective relationships with others with whom interaction is required in the performance of the position.

Work Attitude/Cooperation/Teamwork

Rating: Choose an item.

The extent to which the employee demonstrates a positive attitude and promotes cooperation with supervisors, peers, and others. How well does the employee work and interact with co-workers, management, and others? Does the employee maintain a harmonious and productive relationship with coworkers and constituents? Does the employee offer his/her help to others willingly? Does the employee

obtain cooperation from others? Does the employee respect team members and their individual perspectives? Does the employee readily adapt to changing priorities and demands? Does the employee share information and resources with others to promote positive and collaborative work relationships? Does the employee share responsibility with team members for both successes and failures? Does the employee recognize and appreciate the contributions of team members?

Interpersonal Skills/Communications

Rating: Choose an item.

The extent to which the employee deals positively and effectively with co-workers and other constituents and demonstrates respect for all individuals. Is interaction with employees at all levels of the organization and customers (if applicable) always professional, patient, courteous and respectful? Does the employee listen carefully and seek clarification to ensure understanding? Does the employee effectively convey information and ideas both verbally and in writing? Does the employee communicate in clear, concise and understandable language? How effectively does the employee address and resolve conflict/problematic situations with others? How open is the employee to input, suggestions, and criticism? How effective are communications with coworkers, supervisors, residents, visitors, or other contacts? Does the employee control his/her emotions; maintaining his/her composure in stressful situations?

Supervisor Comments

If employee received a 5, 2 or 1 in above section, please explain reasoning why.

Section 4: Dependability:

The extent to which an employee is reliable and can be counted on to carry out instructions and fulfill his/her job responsibilities accurately and efficiently.

Attendance

Rating: Choose an item.

The extent to which the employee is regularly present at work, on time, and minimizes unexpected absences. Does the employee have any attendance/punctuality issues? Does the employee report to work as scheduled? Does the employee follow established procedures and times for break and meal periods? Does the employee notify the supervisor ahead of time of any schedule changes? How does the employee's use of sick time compare to others in his/her department?

Adherence to Policy

Rating: Choose an item.

The extent to which the employee follows applicable departmental rules, Village policies, a collective bargaining agreement (as applicable), and other conduct guidelines. Does the employee comply with Village policies, procedures and departmental requirements? Does the employee adhere to organization values and guidelines of conduct? Are his/her actions consistent with his/her words? Does he/she communicate high personal standards?

Supervision Required

Rating: Choose an item.

The extent of oversight or direction the employee requires in the performance of his/her duties. Does the employee always make efficient use of his/her time? Does the employee support and accept decisions once they are made? When given work assignments, are they willingly accepted and completed as discussed and on time? Does the employee accomplish tasks within the proper time frame? Is the work complete and thorough, eliminating the need for close review? How much knowledge of the supervisor's work and/or other departmental functions does the employee have? Does the employee accept responsibility for his/her actions, not making excuses or blaming others?

Safety (if applicable to position)

Rating: Choose an item.

The extent to which the employee adheres to safety policies and/or procedures. Is the employee aware of the Village's safety and security policies and regulations? Does the employee adhere to safety procedures for which he/she has responsibility within his/her position? Whether in an office position or field position, does the employee report potential safety hazards immediately upon discovery? Does the employee work in his/her environment in a safe and courteous manner, avoiding shortcuts? Does the employee report any work-related injuries or incidents to his/her supervisor immediately? Does the employee willingly attend safety training sessions required of him/her in his/her position?

Supervisor Comments

If employee received a 5, 2 or 1 in above section, please explain reasoning why.

Areas where employee stood out in the past calendar year? Significant accomplishments outside of set goals.

Areas of weakness and items for employee to address and improve upon for the next calendar year. Any category rated at 1 or 2 above, please address plan for correction/improvement below.

Employee Comments:

Goals, Accomplishments and Follow-Up

Please have the employee complete this form before sitting down to conduct the evaluation.

1. Please state each goal set from the prior calendar year and the corresponding result.

[illegible]

2. Please write down 3 new goals for the upcoming calendar year.

[illegible]

- ### 3. Training and Professional Development for the next Calendar Year.

[illegible]

Supervisor Signature: _____

Date: _____

Employee Signature: _____

Date: _____

DRAFT

Village of Sugar Grove

Employee Performance Assessment

Employee Name:

Department:

Position:

Assessment Period:

Assessor Name:

Instructions: Reference the appropriate documents such as the factors list, job description and prior assessment when considering the following questions. Answer the questions from your perspective in the capacity you serve the Village. Use as many pages as necessary and staple all pages to this cover page. Items 1-4 should be completed in writing and shared with the employee during a meeting to discuss the assessment. The employee should be given up to three days to provide the comments in item 5.

- 1) Describe areas where you believe this employee has done well during the assessment period.
- 2) Describe areas where you believe this employee has not met expectations during the assessment period.
- 3) List the specific focus items from last evaluation and comment on each.
- 4) Describe specific items that you believe this employee should focus on during the next assessment period.
- 5) Include any other comments that you would like to make regarding this employee.
- 6) Attach any written comments from the employee regarding this assessment.
- 7) Submit signed form and attached pages to the Finance Director.

Assessor Signature:

Date:

Employee Signature:

Date:

Department Head Signature:

Date: