

## SWNI PERSONNEL PERFORMANCE EVALUATION FORM

Subject: Southwest Neighborhoods, Inc. (SWNI) Personnel Performance Evaluation Form	Effective Date: 9/11/2011
	Supersedes:
Principal Authors: Marianne Fitzgerald, Glenn Bridger, Sharon Keast, Sylvia Bogert (2011 Personnel Committee)	Revision Date:
Reviewed and approved as final by the 2012 Personnel Committee: Marianne Fitzgerald, Carolyn Raz, Leanne Hartman, Janet Hawkins and Sylvia Bogert (4/20/2012)	
Approved by SWNI Board (date): N/A.	Page(s): 6

### **OVERVIEW**

The personnel performance evaluation is a tool for support, guidance and timely performance feedback. It ensures that the Executive Director and the employees are aligned in their expectations.

The Executive Director will provide staff with an assessment of his/her performance in the categories listed below. The Personnel Committee will provide the Executive Director with an assessment of his/her performance in the categories listed below. The evaluation will also indicate whether the employee has performed in a manner that is exceptional, commendable, solid, or growth needed.

The emphasis of this review, and the conversation it facilitates, will be on:

- Accomplishments during this review period and the impact these had on SWNI;
- How the employee demonstrated the values outlined below which contribute to SWNI's success;
- Improvement and development (as it relates to specific work/projects and an overall ability to contribute in the future); and
- Goals for the upcoming year.

### **SWNI MISSION AND VALUES**

Southwest Neighborhoods, Inc. (SWNI) promotes citizen participation by providing staff assistance to a coalition board of directors, seventeen neighborhood associations, and three business associations in Southwest Portland. SWNI's mission statement reads: "SWNI empowers citizen action to improve and maintain the livability of southwest neighborhoods."

Optimal job performance during the year includes not only delivering results but also accomplishing the work in a manner that is consistent with the values of SWNI. Accordingly, the following values serve as guidelines in the evaluation process:

**Work Quality**

Produces or accomplishes accurate and thorough work. Seeks improvement whenever possible.

**Problem Solving**

Thinks through a problem; recognizes, secures and evaluates relevant facts; reaches sound conclusions.

**Communication**

Expresses oneself well and listens effectively; prepares and delivers effective presentations; keeps others adequately informed; writes effectively (clear, thorough, concise, grammatically correct and considerate in style and tone).

**Teamwork**

Contributes to a harmonious, productive work group; acts as part of a team.

**Service Orientation**

Responds quickly to the needs and requests of neighbors, partners, concerned parties; consistently keeps constituent and partner interests central when making decisions.

**Job Knowledge**

Demonstrates knowledge of administrative responsibilities, program development, and coordination of public events.

**RATING DEFINITIONS**

A SWNI employee's rating is based on the comprehensive evaluation of the information contained in the review. Employees will receive one of the 4 performance ratings outlined below.

**Exceptional**

Employees in this category consistently exceed the requirements of the position. Little opportunity remains for a person in this category to improve their effectiveness or impact. Individuals performing at this level are consistently innovating and bringing new and beneficial ideas and ways of operating to SWNI. These individuals are recognized by peers and stakeholders for repeatedly making significant positive change. Other attributes include:

- Exceeds position responsibilities on a regular basis
- Activities consistently produce superior results
- Recognized by peers and/or community members as a leader and role model for others
- Takes personal accountability for the success of his/her projects, can be counted on to take the lead to establish the direction on a project, task, or team and drive it to success
- Achieves results in a way that always builds constructive working relationships

- If a manager
  - Consistently exceeds requirements for managerial tasks such as planning, setting expectations, ensuring project completion, managing budgets and finances
  - Is a role model of leadership traits
  - Excels at developing staff
  - Excels at establishing and communicating strategic direction and motivating staff to perform at the highest level

### **Commendable**

These people always meet and often exceed the expectations for the position. They have achievements of significant value. Peers and stakeholders consider this person to be a very good contributor and an asset to the organization. Other attributes include:

- Always meets and often exceeds position responsibilities
- Frequently produces superior results, consistently produces good results
- Often takes the lead on projects or tasks
- Achieves results in a way that consistently builds good working relationships
- If a manager
  - Consistently completes managerial tasks such as planning, setting expectations, ensuring project completion, managing budgets and finances
  - Acts as a role model of one or more leadership traits
  - Does a very good job of developing staff
  - Is an effective leader and can ably communicate a strategic direction and enlist good performance

### **Solid**

These people consistently meet expectations for the position. They can demonstrate solid achievements and perform in a reliable manner. A successful individual produces strong consistent results that positively impact SWNI. Peers and stakeholders consider this person to be a good contributor and an asset to the organization. Other attributes include:

- Consistently meets position responsibilities
- Consistently produces good results, occasionally produces superior results
- Peers and customers consider this person to be a good contributor and an asset to the organization
- Occasionally takes the lead on projects or tasks but more often is a valuable team member
- Achieves results in a way that consistently builds good working relationships
- If a manager
  - Consistently completes managerial tasks such as planning, setting expectations, ensuring project completion, managing budgets and finances
  - Does a good job of developing staff

- Can communicate a strategic direction and enlist employee performance

### **Growth Needed**

Individuals in this category are inconsistent in meeting the expected standards for the position. They may meet some standards but fall short of meeting some goals. Immediate and sustained improvement is necessary and individuals in this category should be working closely with their managers to understand how to upgrade performance. Other attributes include:

- Does not always meet position responsibilities
- Requires more management coaching and intervention than other employees
- Peers and customers consider this person to have improvement areas that effect business results
- Does not always contribute at an adequate level to help teams or projects succeed
- Needs improvement in building appropriate working relationships
- If a manager
  - Has not performed all aspects of the management role satisfactorily
  - Does not have the support of his/her team
  - Cannot consistently drive the team to produce results

## ANNUAL PERFORMANCE EVALUATION

---

Employee name \_\_\_\_\_ Job title/responsibilities \_\_\_\_\_

Name of Manager \_\_\_\_\_ Review period \_\_\_\_\_ to \_\_\_\_\_

---

I. ACCOMPLISHMENTS: discuss achievement of several goals and/or other key accomplishments during this review period. Explain the impact of these accomplishments.

Accomplishment	Impact
Accomplishment	Impact
Accomplishment	Impact

II. DEMONSTRATION OF VALUES: Explain how the employee demonstrated SWNI values in performing their work during this review period. The values are listed on the accompanying sheet.

III. MANAGERIAL PERFORMANCE (For Managers Only): Explain how the employee performed his/her managerial duties. Take subordinate feedback into account.

IV. AREAS OF GROWTH/DEVELOPMENT: Specify the way the employee can improve their performance or increase their effectiveness in the upcoming year.

### V. PERFORMANCE EVALUATION

- Exceptional
- Commendable
- Solid
- Growth Needed

### VI. EMPLOYEE GOALS AND FOCUS AREAS FOR THE UPCOMING YEAR

VII. EMPLOYEE ACKNOWLEDGEMENT

I have received a written and verbal Performance Review. My signature does not indicate agreement or disagreement with this review.

Employee Signature \_\_\_\_\_ Date \_\_\_\_\_

Manager Signature \_\_\_\_\_ Date \_\_\_\_\_

Personnel Committee Acknowledgment \_\_\_\_\_

Date \_\_\_\_\_

VIII. EMPLOYEE COMMENTS (OPTIONAL)