Employee ID

Period Start Date:

Period End Date:

Employee Name:

Date of Review:

Department:

Leader Name:

Job Title:

Leader Title:

**This form must be completed by the employee’s immediate Leadership.  
RATING SCALE:** Use this scale for all items on this form requiring a numeric rating. Leaders must develop a performance improvement plan for overall score where an employee received a rating of 1.

PART I: CITYWIDE GOALS (50% of overall rating)

In this section, the employee will be evaluated on each City Goal. Evaluators will enter the scores for each goal in the Scoring Table at the end of Part 1. Each Goal has been assigned a weight. The weight will be listed on the scoring table and at the bottom of the first column for each goal.

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| **Citywide Goal 1** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Fiscal Management & Leadership**  Manage departmental budgets effectively ensuring resources are allocated wisely and expenditures are justified. Adhere to City financial regulations, demonstrating accountability for public funds.  **Weight: 4** | **Does Not Meet Expectations:** Ineffectively manages departmental budgets, leading to overspending or misallocation of funds. Demonstrates inconsistent adherence to City financial regulations, undermining public fund accountability.   **Needs Improvement:** Managers departmental budget with room for improvement, occasionally facing overspending. Generally follows City financial regulations, but with occasional lapses, impacting financial accountability. | **Adherence to Financial Regulations:** Consistently adheres to city financial regulations, demonstrating a strong sense of accountability for public funds.  **Budget Management:** Effectively manages departmental budgets, ensuring resources are allocated wisely and expenditures are justified. | **Budget Management:** Demonstrates exceptional skill in managing departmental budgets, optimizing resource allocation and justifying expenditures to maximize departmental efficiency and impact.  **Adherence to Financial Regulations:** Exhibits outstanding adherence to city financial regulations, setting a high standard for financialaccountability and stewardship of public funds. |  |

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| **Citywide Goal 2** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Completion of Budget Initiatives**   Consistently meet or exceed established targets for executing budget initiatives, demonstrating effective fiscal stewardship and accountability.  **Weight: 4** | **Does Not Meet Expectations:** Less than 70% of budget initiatives are completed in a timely manner.   **Needs Improvement:** Successfully completed at least 70% of budget initiatives in a timely manner | **Meets Expectations** Successfully completed at least 80% of budget initiatives in a timely manner, demonstrating effective planning and resource management to achieve financial goals. | **Exceed Expectations:** Completes 90% or more of budget initiatives, showcasing exemplary planning, resource management, and execution that serve as a model for fiscal discipline. |  |

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| **Citywide Goal 3** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Effective Communication with City Management, City Council, and Peers** Cultivate strong relationships and maintain open lines of communication with all stakeholders. Demonstrate proactive communication by informing Executive Leadership Team (ELT) and/or City Manager of public events at least two weeks prior to their occurrence, ensuring alignment and coordinated efforts. Engage stakeholders through regular updates, feedback mechanisms, and transparent information sharing, fostering collaboration and trust within the community and across the organization.  **Weight: 4** | **Does Not Meet Expectations:** Fails to cultivate relationships with stakeholders, does not proactively communicate about upcoming events or important information, and lacks transparency and regular updates, significantly impacting collaboration and trust.   **Needs Improvement:** Makes efforts to establish connections with stakeholders but lacks consistency; communicates important events occasionally but not always in a timely manner, leading to potential misalignments; and attempts to engage and share information but does not do so comprehensively, affecting collaboration and trust. | **Relationship Cultivation:**Successfully cultivates and maintains strong relationships with stakeholders, fostering collaboration and mutual support. **Proactive Communication:** Demonstrates proactive communication by consistently informing the ELT and City Manager of important events and updates at least 2 weeks in advance, ensuring alignment and coordinated efforts.  **Engagement and Transparency:** Regularly engages stakeholders through updates, feedback mechanisms, and transparent information sharing, building trust and promoting effective collaboration across the community and organization. | **Relationship Cultivation:**Exemplifies exceptional ability to build and deepen relationships with a wide range of stakeholders, creating a strong network of support and collaboration that benefits the community and organization. **Proactive Communication:** Sets a high standard for proactive communication, always keeping the ELT, City Manager, and stakeholders informed with ample notice, facilitating outstanding alignment and seamless coordination on initiatives.  **Engagement and Transparency:** Leads innovative engagement strategies and fosters an environment of openness, regularly updating stakeholders and encouraging feedback, which significantly enhances trust and collaborative success. |  |

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| **Citywide Goal 4** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Commitment to Employee Engagement & Talent Development:** Actively promote and encourage team participation in engagement surveys by emphasizing their importance in shaping workplace policies and practices, demonstrating a commitment to talent development and a highly engaged workforce. Hold responsibility for creating a culture that values growth, learning and open feedback.  **Weight: 3** | **Does Not Meet Expectations:** Exhibits negligible effort in talent development with minimal professional growth opportunities, leading to employee underutilization. Shows a lack of initiative in engaging employees, resulting in disengagement, low morale, and high turnover. Rarely promotes participation in engagement surveys, overlooking vital organizational feedback. Has less than 60% of department complete engagement survey.   **Needs Improvement:** Provides limited talent development opportunities. Shows some effort in engaging employees, but sporadically. Occasionally promotes engagement surveys but fails to motivate widespread participation or effectively use feedback for improvement. Has over 60% of department complete engagement survey. | **Talent Development:** Actively supports talent development with regular opportunities for learning and growth that align with both individual and organizational goals.  **Employee Engagement:** Successfully engages employees through meaningful initiatives, resulting in improved morale, productivity, and lower turnover rates. Consistently promotes and encourages participation in engagement surveys, effectively using the feedback to make informed decisions and improvements. Department participation in engagement survey is 72% or higher. | **Talent Development:** Exemplifies a profound commitment to talent development, offering a wide array of innovative and impactful learning opportunities that exceed industry norms and significantly enhance workforce capabilities. **Employee Engagement:** Fosters a highly engaging work environment through exceptional engagement strategies, leading to outstanding employee satisfaction, loyalty, and performance. Actively promotes and champions the importance of engagement surveys, ensuring high participation rates and leveraging insights to drive strategic initiatives and foster a culture of continuous improvement. Department participation in engagement survey is over 85%. |  |

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| **Citywide Goal 5** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Leadership, Operational Excellence and Overall Care** Demonstrates operational excellence through strong leadership, fostering team development, filling executive vacancies, adept conflict resolution and clear communication of expectations and progress. Hods employees accountable, maintains transparent communication with stakeholders and emphasizes process consistency to optimize resources. Empowers teams to innovate and problem-solve.  **Weight: 2** | **Does Not Meet Expectations:** Demonstrates poor leadership skills, failing to foster team development or resolve conflicts effectively. Communication of progress is unclear or inconsistent. Employee accountability is lacking. Struggles to maintain consistent processes. Executive vacancies are left unfilled far beyond set goals. Less than 80% of departmental performance reviews, excluding those of employees on leave, are fully completed and submitted.   **Needs Improvement:** Displays some leadership skills but with room for improvement. Provides some team development and conflict resolutions but communication of expectations needs refinement. Holds employees accountable inconsistently. Maintains some process consistency but with occasional lapses, impacting resource optimization and operation efficiency. Less than 95% of departmental performance reviews, excluding those of employees on leave, are fully completed and submitted. | **Leadership Effectiveness:** Demonstrates effective leadership, resolving conflict adeptly and fostering team development. Communicates expectations and progress clearly. Holds employees accountable and maintains transparent communication with stakeholders. At least 95% of departmental performance reviews, excluding those of employees on leave, are fully completed and submitted. **Operational Consistency:** Maintains consistent processes, optimizing resources and ensuring operational excellence.  **Empowerment and Innovation:** Empowers teams to innovate and problem-solve, fostering a culture of creativity and continuous improvement. Executive vacancies are filled in a timely manner. | **Leadership Effectiveness:** Exhibits exceptional leadership skills, inspiring team development, resolving conflicts seamlessly. Holds employees highly accountable and maintains strong relationships with stakeholders. 100% of departmental performance reviews, excluding those of employees on leave, are fully completed and submitted. **Operational Consistency:** Ensures impeccable consistency in processes, maximizing resource utilization and operational efficiency to achieve excellence.  **Empowerment and Innovation:** Empowers teams to innovate and problem-solve at a high level, fostering a culture of continuous improvement and driving organizational success through creativity and innovation. Proactively works to develop talent or industry connections to fill Executive Vacancies. |  |

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| **Citywide Goal 6** | **1-2** | | | **3 – Meets Expectations** | | | **4 – Exceeds Expectations** | **Rate** | |
| **Support for Employee Wellness and Safety:** Ensure access to resources that support physical, mental, emotional & financial health. Foster a supportive workplace environment that encourages work-life balance and promotes practices that enhance overall well-being. Maintain a steadfast commitment to workplace safety, by implementing and enforcing safety policy and procedures that protect employees from workplace hazards while reducing motor vehicle accidents and workers’ compensation claims.  **Weight: 1.5** | **Does Not Meet Expectations:** Significantly neglects employee well-being by failing to provide access to essential wellness resources and support for physical, emotional, mental & financial health. Does not promote work-life balance. Demonstrates a concerning lack of safety, with inadequate measures that compromise employee security. Does not possess fundamental knowledge of city safety policy or awareness. Does not promote safety training or awareness. Lacks awareness of workers’ compensation injuries and motor vehicles accidents trending in the department.   **Needs Improvement:** Offers limited access to wellness resources that only partially meets health needs. Attempts to encourage work-life balance are made, yet effective policies are missing. Basic safety protocols are in place, but a full commitment to secure work environment is lacking, with notable loss control safety gaps. | | | **Wellness Resources & Work-life Balance:** Ensures good access to a variety of resources that adequately support the physical, emotional, mental, and financial health of employees, contributing to their overall well-being.Actively fosters a supportive workplace that encourages work-life balance, implementing policies that help employees manage their personal and professional responsibilities effectively.  **Workplace Safety:** Demonstrates a strong commitment to workplace safety, providing adequate resources and measures to protect employees and ensure a safe working environment**.** Consistently, promotes safety through training and engages internal and external safety resources. Establishes benchmarks to reduce preventable motor vehicles and on the job injuries. Exhibits awareness and working knowledge of safety and loss control policies. | | | **Wellness Resources & Work-life Balance:** Provides exceptional access to comprehensive resources that thoroughly support the physical, emotional, mental, and financial health of employees, significantly enhancing their well-being and satisfaction.Champions an outstanding workplace culture that prioritizes and effectively promotes work-life balance, leading to highly motivated, satisfied, and well-balanced employees.  **Workplace Safety:** Exemplifies an unwavering commitment to workplace safety, going above and beyond standard measures to ensure the highest level of safety and protection for all employees. Establishes safety best practices standard in all segments in the department to reduce preventable motor vehicle accidents and on the job injuries. Consistently monitors and implements innovative safety training to reduces frequency of preventable motor vehicle accidents and injuries. |  | |
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| **Citywide Goal 7** | | **1-2** | **3 – Meets Expectations** | | | **4 – Exceeds Expectations** | | | **Rate** | |
| **Commitment to Process Improvement:** Demonstrate a continuous dedication to enhancing operational efficiency and effectiveness. Actively seek and implement innovative solutions and best practices to streamline processes, reduce waste and improve service delivery. Encourage a culture of critical evaluation and adaptability, where feedback is leveraged to drive improvements and excellence in all departmental activities.  **Weight: 1** | | **Does Not Meet Expectations:** Demonstrates minimal use of performance analytics, showing little interest in leveraging data for service improvement. Decisions are often made with scant data support, leading to ineffective strategies that don’t fully meet City needs.   **Needs Improvement:** Acknowledges the importance of analytics but integrates them sporadically, impacting the effectiveness of operational and strategic decisions. While some decisions are data-informed, there’s a noticeable lack of comprehensive data usage in strategic planning and service improvement.   **Service Needs Assessment Does Not Meet**: Did not develop a service delivery improvement assessment.  **Needs Improvement:** Developed service delivery improvement assessment but did not conduct full assessment | | | **Analytics Utilization:** Regularly uses city performance analytics and data to guide decisions, demonstrating a good understanding of how data can enhance service delivery and operational performance. **Improvement Assessments:** Engages in consistent performance improvement assessments, using insights to make informed adjustments that positively impact service quality and efficiency. Conducted service delivery improvement assessment and created plan to address areas of improvement.  **Strategic Decision Making:** Employs data-driven decision-making effectively, using analytics to inform strategy and operational improvements, leading to measurable enhancements in city services. | **Analytics Utilization:** Masterfully leverages performance analytics and data, setting an industry standard for how data can optimize city service delivery and operational efficiency. Innovates in the application of analytics to uncover deep insights.  **Improvement Assessments:** Conducts comprehensive and regular performance improvement assessments, using sophisticated methods to derive actionable insights. Demonstrates exceptional skill in translating data into strategic improvements across the board. Conducted service delivery improvement assessment and implemented several solutions to improve service delivery.  **Strategic Decision Making:** Practices exemplary data-driven decision-making, using advanced analytics to inform strategic planning and operational improvements. Leads significant, measurable improvements in city services and operational efficiencies, serving as a model for others. | | |  | |

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| **Citywide Goal 8** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Support for Organizational Diversity and Inclusion:** Champion a workplace culture that values and respects all dimensions of diversity in all forms. Actively promote inclusive practices that ensure equity, representation and participation across all levels of the organization. Foster an environment where employees feel valued, included, and empowered to contribute their unique perspectives and talents***.***  ***Weight: 1*** | **Does Not Meet Expectations:** Rarely fosters a diverse culture, with minimal efforts toward inclusion, often neglecting the importance of diversity and inclusion in leadership actions, resulting in a disengaged workforce and lack of equity. Less than 75% compliance with inclusive practices such as HR-approved accommodations for employees   **Needs Improvement:** Acknowledges the importance of diversity and inclusion but inconsistently champions these values. Makes efforts to value and include employees but lacks a comprehensive approach to fully empower diverse perspectives, occasionally promotion but not ensuring inclusive practices. Less than 80% compliance with inclusive practices such as HR-approved accommodations for employees. | **Culture and Values:** Successfully fosters a workplace culture that values and respect diversity. Demonstrates a clear commitment to promoting diversity and inclusion through leadership actions.  **Inclusive Practices:** Encourages all employees to feel valued, included and empowered to contribute their unique perspectives and talents. Actively promotes and implements inclusive practices, ensuring equity and representation at all levels.80% - 89% compliance with inclusive practices such as HR-approved accommodations for employees. | **Culture and Values:** Exemplifies and champions a workplace culture that values and respect diversity. Leads innovative initiatives that significantly enhance diversity and inclusions**.   Inclusive Practices:** Goes above and beyond to ensure all employees feel valued, included and empowered. Creates numerous opportunities for employees to contribute their unique perspectives and talents, leading to a highly engaged, innovative and collaborative workforce.Over 90% compliance with inclusive practices such as HR-approved accommodations for employees. |  |

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| **Citywide Goal 9** | **1-2** | **3 – Meets Expectations** | **4 – Exceeds Expectations** | **Rate** |
| **Demonstrates High Ethical and Moral Standards**:  Demonstrates high ethical and moral standards by upholding integrity, transparency, fairness, and respect in all actions. Ensures alignment with City guidelines and promotes a culture of honesty and accountability. Actively pursues ethics education to stay current on issues and best practices. Encourages team ethics training and proactively addresses potential dilemmas. Prioritizes continuous enhancement of ethical knowledge and reinforcement of ethical behavior to effectively navigate complex situations.  **Weight: 1** | **Does Not Meet Expectations:** Often shows significant ethical lapses, rarely a positive role model, frequently misaligns with City Guidelines. Does not participate in any ethics-focused continuing education.  **Needs Improvement:** Displays some integrity but inconsistently, sometimes a role model, attempts to align with City guidelines but with lapses. Does not participate in any ethics-focused continuing education. | **Integrity & Ethical Conduct:** Regularly demonstrates integrity and ethical conduct in decisions and actions, adhering to ethical standards.   **Role Model:** Often serves as a positive example for others, displaying transparency, fairness, and respect in various situations.   **Alignment with the City Guidelines:** Consistently ensures that departmental activities align with city guidelines, fostering a culture of honesty and accountability. Takes at least 0.5 hours of ethics-focused continuing education. | **Integrity & Ethical Conduct:** Consistently upholds the highest standards of integrity and ethical conduct in every decision and action, setting a benchmark for ethical behavior.   **Role Model:** Always serves as an exemplary role model, embodying and promoting transparency fairness and respect in every interaction.    **Alignment with the City Guidelines:** Not only ensures that departmental activities align with city guidelines but also actively enhances the culture of honesty and accountability. Takes at least 1 hour of ethics-focused continuing education and provides leaders in department with at least 0.5 hours of ethics-focused continuing education. |  |

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| **Citywide Goal 10** | **1-2** | **3** | **4** | **Rate** |
| **Committed Effective Leadership & Management:** prioritize efficient, transparent and responsible management practices. Focus on strategic planning, effective resource allocation and continuous process improvement to achieve departmental goals & citywide objectives. Foster an environment that encourages innovation, accountability and collaboration.  **Weight: 1** | **Does Not Meet Expectations:** Often uses ineffective management practices, lacks strategic planning, misallocates resources, and shows little interest in process improvement, causing missed deadlines, overspending, and departmental inefficiencies.   **Did not achieve any of the following:** 1) completed continuing education in management best practices, 2) solicited ideas from department members on process improvements, 3) implemented a new procedure that provided cost savings or 4) measured customer satisfaction with department   **Needs Improvement:** Employs basic management practices with inconsistency, demonstrates some strategic planning but with ineffective resource allocation, and sporadically recognizes the need for process improvement leading to occasional delays and unmet objectives. Completed at least 1 item from the paragraph above. | **Management Practices:** Consistently employs sound and effective management practices, ensuring projects are completed on time, within budget, and meet set objectives. **Strategic Planning & Resource** Allocation: Engages in thoughtful strategic planning, effectively allocating resources to meet current and anticipated needs of the department. **Process Improvement:** Actively seeks and implements ways to improve processes, showing adaptability and a commitment to enhancing operational efficiency.  **Completed 2 of the following:** 1) completed continuing education in management best practices, 2) solicited ideas from department members on process improvements, 3) implemented a new procedure that provided cost savings or 4) measured customer satisfaction with department | **Management Practices:** Master in deploying advanced management practices, leading to exceptional project outcomes, innovative solutions, and significant contributions to departmental goals. **Strategic Planning & Resource Allocation:** Demonstrates exemplary strategic planning abilities, forecasting future needs with precision and allocating resources in a manner that not only meets but advances departmental and city-wide objectives.   **Process Improvement**: Displays little interest in evaluating or improving current processes, leading to stagnation and inefficiencies within the department.  **Completed 3 of the following:** 1) completed continuing education in management best practices, 2) solicited ideas from department members on process improvements, 3) implemented a new procedure that provided cost savings or 4) measured customer satisfaction with department |  |

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| **PART I: Score** |

**Scoring Instructions:**  
**Please double-click on the table below**. Enter the scores achieved in the column named “Score Input”. (*Note: this column has been identified with a thick border around the cells.)*   
  
**The table will auto calculate the final score for Part 1 in the yellow row.**



*If you encounter any technical difficulties with the built-in calculator, please contact Organizational Development at* [*performancereviews@cctexas.com*](mailto:performancereviews@cctexas.com)*.*

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| **PART II: GOALS AND RESPONSIBILITIES (50% of overall rating; equally weighted)** |
| All executive-level employees are required to set a minimum of 3 goals. These goals are established through a collaborative discussion between the employee and their leadership team.  During this process, they review the employee's performance over the previous rating cycle and Leadership will determine an achievement level ranging from 1 (Does Not Meet) to 4 (Exceeds Expectations). |
| **GOAL 1:** |
| *Summary:* |
| **GOAL 2:** |
| *Summary:* |
| **GOAL 3:** |
| *Summary:* |
| **GOAL 4:** |
| *Summary:* |
| **GOAL 5:** |
| *Summary:* |

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| **Part II: Goals and Responsibilities Score=** |  |

**Scoring Instructions for Overall Rating.**Add Part 1 and Part 2 scores together. Divide this sum by 2 to calculate your final Overall Rating. Enter this score into the box below.

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| **PART III: STATEMENT OF OVERALL PERFORMANCE - to be completed by Leadership** | | |
| Provide a brief description of the employee’s overall performance for the review period: | | OVERALL RATING = Average of Part I & II  **4 = Exceeds Expectations**  **3 = Meets Expectations**  **2 = Needs Improvement**  **1 = Does Not Meet** |
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| **Leadership SIGNATURE:** |  | **DATE:** |  |
| **City Manager (or designee) SIGNATURE:** |  | **DATE:** |  |

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| **PART VI: EMPLOYEE COMMENTS AND ACKNOWLEDGEMENT SIGNATURE** | |
| *Leaders should provide employees with an opportunity to provide comments. If employee has no comments, they should note “none”.* | |
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| **Employee, signing below does not constitute agreement with your performance evaluation. By signing below, you are acknowledging that this performance review has been discussed with you.** |  |

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| **EMPLOYEE SIGNATURE:** |  | **DATE:** |  |