FINNEY COUNTY TRANSIT CENTER

Our Transportation Is Your Destination

*1008 N. 11th Street * Garden City, KS 67846 * 620-272-3626*

www.finneycountytransit.org

FCT MONTHLY REPORT
June 2019

May 2nd FCT provided a bus for the Public Utility Advisory Board to tour utilities in Garden City

May 9th FCT presented to the PRSSWKS (Public Relations Society of South West Kansas). Had good discussion on how we advertise, what works and what doesn't. Also attended the Horrice Good School Informational School Carnival. There was a great attendance and many pamphlets were given out.

May 21st FCT provided a bus for the Finney county Economic Development for 16 individuals including the State Commerce Secretary to tour 21 locations in Garden City to learn first-hand about the community's success in growing the economy over the past several years.

The by-pass construction continues to bring more and larger traffic into town.

We have kicked off our Kids ride free in the summer program. Advertising on Facebook, Instagram, and twitter.

We will also be in the Beef Empire days parade June 8th and participate in the Touch a Truck on June 29th at the Finney county Fair Grounds.

The city has also agreed to move the bus stop at Apple Gardens to Main Street to reduce some visibility and traffic issues at this location.

City Link provided 6,053 rides in May 2019 averaging 275 rides per day. This is a decrease in ridership of 3.03% from May 2018. Mini Bus 1,348 provided rides averaging 61 rides per day. This is an 14% increase in ridership of from May 2018.

Respectfully,

Rhonda Everett

Rhonda Everett
Finney County Transit Director

BUS ROUTE DESCRIPTIONS	MAY 2019					ROUTE TOTALS
	M	T	W	T	F	
RED - SOUTH CITY	198	245	314	266	268	1291
GREEN - NORTH CITY	171	171	247	233	287	1109
ORANGE - SE COUNTY	255	277	353	295	340	1520
BLUE - NW COUNTY	268	348	532	460	525	2133
MONTHLY TOTALS	892	1041	1446	1254	1420	6053

Avg. Rides: 275

22 days

MINIBUS
RIDERSHIP BOARDINGS

BUS NUMBER	MAY 2019					ROUTE TOTALS
	M	T	W	T	F	
#14	3	4	13	8	36	64
#15	19	30	44	32	56	181
#17	30	51	64	78	69	292
#18	32	38	67	60	53	250
#19	29	44	71	63	63	270
#20	0	0	10	11	33	54
#37	24	22	68	58	65	237
	0	0	0	0	0	0
	0	0	0	0	0	0
	0	0	0	0	0	0
	0	0	0	0	0	0
	0	0	0	0	0	0
MONTHLY TOTALS	137	189	337	310	375	1348

Avg. Rides: 61

22 days

Finney County Committee on Aging

Shari Campbell, Executive Director
June 14, 2019

Activities Report:

- We had our first Senior Center trip this month. We had 14 go Sequoyah 9 Movie Theater to see the movie POMS.
- We have tentative dates for trips to Scott Lake, Stauth Museum, Boot Hill Casino, and Finney County Museum and Zoo.
- June 25 trip to Boot Hill Casino: 26 people have reserved space on two busses.
- Finney County Transit staff participated in the Beef Empire Days Parade in June.

Building Report

- Since county staff cleaned drains on roof, we haven't had any new water leak issues.
- Randy at County reports that contract for IT support is still in development. They will support us in the capacity that they can for now. We are on schedule for Cox telephone installation later in the summer.
- County will begin LED light installation in June or July. Rex reports they have been approved to start.
- County referred us to private contractor for internet cable project. Also they are giving us a bid for cable wiring installation on north wall.

Daily Activities

- Meeting with team twice a month and weekly with direct reports.
- Mingling with seniors at meals and during activities.

Projects report

- **Telephone services** –Cox installation later in summer 2019. No telephone costs identified yet. Waiting on prices from Doug with County IT.
- **Outlook Client** –once we have an agreement with IT and the County, we will transition to the full Outlook program. No movement on this project yet.
- **Position Descriptions, Salary Schedule and Performance Evaluations** – The Arnold Group has begun working on our work agreement. Salary schedule, position description and performance review forms are all in draft form and ready for review. See Board agenda.
- **Fiscal**
    - Budget presentation was May 20. County budget discussions are scheduled for Monday, July 15. Shari will attend.
    - Auditors were here the week of June 3. No major issues were identified/shared.
    - Invoices are reviewed weekly with Hilary. Payroll is reviewed bi-monthly with Hilary.

Job Description

Job Title:	**Accounting Clerk and ~~Senior~~ FCCA ~~Center~~Assistant Director**	**Job Grade:**	**31**
FLSA Status:	**Exempt**	**Reports To:**	**Executive Director**
Approved By:		**Date:**	**06/01/2019**

Job Purpose: The Accounting Clerk and the FCCA Assistant Director is responsible for keeping financial records for FCCA. This position also performs development activities in service to the Senior Center and Finney County Transit as required.

Commented [SC1]:

Essential Functions include the following. Other duties may be assigned.

1. Prepares all FCCA Board Financials for review by Executive Director.
2. Assists with development of and assembly of the board packet for the month.
3. Prepares financial reports requested by the department managers as needed
4. Assigns income and expenses by funding sources by class and job of each department. Employee ~~M~~match~~etche~~s invoices with statements of incoming bills twice monthly, enter into Quick Books with a breakdown of appropriate codes listed on each statement. Accounting Clerk will make sure all bills are paid in a timely manner.
5. Prepares reports for 990, W-2, 1099 and Non-Profit Annual Report.
6. Balances petty cash monthly and when supply is low an itemized list of debits replenish up to $200.00.
7. Maintains orderly and accessible vendor/payable files.
8. Designates employees for counting and receipting money at Senior Center and FCT.
9. Deposits receipts are turned over to the Accounting Clerk for entry into Quick Books software.
10. Designates employees (other than the employee who is ~~one~~ counting) to make deposit deliveries to the Bank.
11. Reconciles all bank accounts and file.
12. Obtains information necessary for investment of funds for the Executive Director and FCCA Board Treasurer and assist as needed.
13. Provides reporting documents necessary for all organization audits.
14. Enrolls new employees providing them with all needed forms, Personnel Policy and other documents required. Files appropriate forms. Works with our retirement and AFLAC representatives.
15. Keeps accurate records of each employee: wage, taxes, deductions, etc. Balance these records to the appropriate cash, salary and payroll deduction accounts.
16. Maintains records of optional payroll deductions as directed by individual employees. Issue checks for respective deductions.
17. Prepares payroll by direct deposit and accounts payable every two weeks. Submit Payroll Summary report with timesheets to Executive Director for approval by Tuesday at noon on payroll week. Direct deposit transfer must be complete by noon Wednesday of payroll week so funds are available for staff on Friday morning. Make needed adjustments allowing for holidays.
18. Makes FICA, federal and state withholding payments each Wednesday of payroll week.
19. Makes retirement, AFLAC, and liability payments on Wednesday of the last payroll week of each month.
20. Reconciles all payroll liability accounts on a monthly basis.
21. Prepares quarterly reports for federal, FICA and state withholding and state unemployment.
22. Processes Month-end payroll reports and forward to Executive Director.
23. Tracks sick/vacation availability and usage for all employees.
24. Assists the Executive Director in the day to day operations of the Senior Center.
25. Serves as the go to person in the absence of the Executive Director.
26. Answers the phone when necessary.
27. Assists with scheduling and planning programs at the Senior Center.
28. Attends FCCA meetings, take minutes, type up and ready for the board packets
29. Schedules FCCA staff for County mandated trainings.
30. Creates and maintains tracking system for mandated trainings and compliance.
31. Performs any related work which may be assigned for FCCA.

Additional Responsibilities:

1. Is available to assist employees with paperwork and/or other problems as needed.
2. Perform related work to the development of the Senior Center and FCT as assigned.
3. Performs additional duties as assigned.

Qualifications and Requirements: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. High school diploma or GED; Bachelor's degree in Business preferred and at least 3 years of experience that is directly related to the duties and responsibilities specified. Minimum 3 years experience in supervisory/management role.
2. Requires a valid Kansas Driver's license, an MVR with good driving record and verifiable insurance.
3. Ability to analyze information and evaluate results to choose the best solution and solve problems.
4. Excellent customer service skills with the ability to interact in a positive and professional manner to develop and maintain strong working relationships with customers, co-workers, and management.
5. Handles issues in the best interest of both customer and company.
6. Excellent written and verbal communication skills, to include quality telephone skills, with the ability to clearly communicate information to customers, co-workers and management.
7. Ability to read and interpret documents such as customer agreements, billing invoices, and job instructions.
8. Add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to calculate figures and amounts such as proportions and percentages.
9. Apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.
10. Deal with problems involving several concrete variables in standardized situations.
11. Exercise good judgment in decision making and prioritizing.
12. Strong attention to detail, organizational skills, and ability to prioritize.
13. Ability to use basic office equipment, such as copy machine, fax machine, computer, printer, adding machine, and telephone system and operate computer software, to include, Microsoft Office and QuickBooks products.
14. Data entry skills including speed and accuracy.
15. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to sit or stand; use hands to finger, handle, or feel; and reach with hands and arms. The employee must occasionally walk and lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and ability to adjust focus.
16. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The work environment is usually well lit, heated and/or air-conditioned indoor office setting with adequate ventilation. The noise level in the work environment is usually moderate. This position requires occasional travel, which may involve exposure to extreme weather conditions.

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This job description was reviewed with me and I understand that nothing in this job description restricts management's right to assign or reassign duties and responsibilities to this job at any time. This job description reflects management's assignment of essential functions; it does not prescribe or restrict the tasks that may be assigned. This job description is not intended as a contract of employment, nor to be construed as a guarantee of employment for any specific period of time or any specific type of work.

Employee Signature: _____ **Date:** _____

Revision Records

Job Description

Revision Number	Author	Date	Description
0	TAG	06/01/2019	Created

Job Description

Job Title:	Executive Director	Job Grade:	34
FLSA Status:	Exempt	Reports To:	Board of Directors
Approved By:		Date:	06/01/2019

Job Purpose: The Executive Director is responsible for providing professional assistance and service to the FCCA and to the committees established by the FCCA. This position serves as a resource person to those organizations responsible for serving senior citizens within the county and coordinate with the programs and work of those organizations. This position also sees that senior citizens, including those not served by any special organization, become aware of the services offered by the Senior Center.

Essential Functions include the following. Other duties may be assigned.

1. Meets regularly with the FCCA Board of Directors, assists in implementing and explaining the FCCA decisions and periodically reviews progress of work assigned.
2. Confers with the chairperson of the FCCA Board of Directors and prepares agenda for the monthly committee meeting. Mails agendas to each committee member two (2) days before the meeting and prepares special meeting agendas by meeting time.
3. Presents comprehensive Executive Director's Report for regular FCCA Board meetings to include information of activities and needs of senior citizens.
4. Posts the date, time, and place of all regular and special FCCA Board meetings and encourages interested citizens and/or groups to attend; posts minutes and financial report after each meeting. Keeps copies of minutes in permanent file at Center office.
5. Acts as a liaison between the FCCA, the Finney County Commissioners, and the City of Garden City Commissioners.
6. Directs the work of employed staff for Senior Center of Finney County and Finney County Transit through the Department Directors.
7. Oversees the Senior Accounting Clerk/Assistant Director.
8. Sets up system to recruit, assign, train and supervise staff with Department Directors.
9. Develops job descriptions with employed staff subject to the approval of the FCCA Board of Directors.
10. Evaluates job performance.
11. Creates annual budgets for Senior Center of Finney County and Finney County Transit for approval by FCCA Board of Directors.
12. Approves expenditures for essential office and building items up to and including $1,500. Any non-specified expenditures over this amount need FCCA Board approval.
13. Ensures that checks are written and that accounting system is maintained in proper order and ready for audit at proper times.
14. Reviews monthly financial statements prepared by Accounting Clerk for regular FCCA Board meetings.
15. Oversees or delegates the opening and closing of the buildings at all times; ensures that a system for checking in and out of keys is established and maintained.
16. Develops a maintenance schedule.
17. Directs staff to oversee maintenance of infectious control cleaning kits.
18. Oversees janitorial position for daily maintenance of Senior Center and oversees the exterior and interior maintenance including lawn care, keeping parking lot clean and snow removal.
19. Ensures proper OSHA standards are being met; ensures area around furnaces in the basement are clear, paper products in Janitor's room have a space of four (4) feet between products and hot water heater and a space of ten (10) feet between paper products and the furnace.
20. Keeps "Material Safety Data Sheet Book" up to date at all times.
21. Ensures all exit and back-up exit lights in working order.
22. Plans regular safety meetings and keeps a record of them.
23. Prepares a monthly report on the status of the building.
24. Oversees the building usage schedule for the Senior Center and makes sure certain rooms are available for scheduled meetings.

25. Is aware of community, state and national programs, legislation and regulations affecting senior citizen programs and public transportation and reports to appropriate groups and individuals as needed.
26. Oversees and approves the Garden City Telegram "Senior Showcase" column weekly.
27. Develops strong positive public relations/image of the Senior Center of Finney County and Finney County Transit.
28. Plans and executes new programs based on needs and expressed desires of senior citizens and committees.
29. Serves as a resource person to community organizations and committees of senior citizens.
30. Attends meetings, if possible, and keep copies of minutes in permanent file.
31. Prepares monthly newsletter and makes available to the public.
32. Provides a central source of reliable and objective information about a broad range of programs and services for older adults in Finney County.
33. Helps people understand and evaluate the various options available to them; assists in finding resources in the community and make informed decisions about Medicare, Supplemental Insurance, Long-term care, and Home Health. Assists with education about conserving personal resources, maintaining self-sufficiency and delaying or preventing the need for potentially expensive long-term care.
34. Prepares the grant application and administration of the 5311 KDOT Grant by developing relationships with KDOT, City of Garden City and Finney County Liaisons.
35. Reviews and follows KDOT Grantee Policies, ADA and FTA Guidelines and Regulations and KCC Safety Compliance Regulations.
36. Attends appropriate transportation trainings/meetings.
37. Ensures that any and all required local, state, and national reports are prepared and FCCA members have copies.
38. Reviews all Transit bills, reviews monthly KDOT reimbursement reports, and reviews KDOT, Finney County, City of Garden City and City of Dodge City budgets/reports.

Additional Responsibilities:

1. Performs additional duties as assigned.

Qualifications and Requirements: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. High school diploma or GED; Bachelor's degree. Master's Degree in Business or related field preferred and at least 3 years of experience that is directly related to the duties and responsibilities specified. Minimum 3 years experience in supervisory/management role.
~~1.~~2. Must be able to get to all levels of the building on a regular, on-going basis to access and maintain water heaters, furnaces, air conditioners and water softener.
~~2.~~3. Ability to analyze information and evaluate results to choose the best solution and solve problems.
~~3.~~4. Excellent customer service skills with the ability to interact in a positive and professional manner to develop and maintain strong working relationships with customers, co-workers, and management.
~~4.~~5. Handles issues in the best interest of both customer and company.
~~5.~~6. Excellent written and verbal communication skills, to include quality telephone skills, with the ability to clearly communicate information to customers, co-workers and management.
~~6.~~7. Ability to read and interpret documents such as customer agreements, billing invoices, and job instructions.
~~7.~~8. Add, subtract, multiply, and divide in all units of measure, using whole numbers, common fractions, and decimals. Ability to calculate figures and amounts such as proportions and percentages.
~~8.~~9. Apply common sense understanding to carry out instructions furnished in written, oral, or diagram form.
~~9.~~10. Deal with problems involving several concrete variables in standardized situations.
~~10.~~11. Exercise good judgment in decision making and prioritizing.
~~11.~~12. Strong attention to detail, organizational skills, and ability to prioritize.
~~12.~~13. Ability to use basic office equipment, such as copy machine, fax machine, computer, printer, adding machine, and telephone system and operate computer software, to include, Microsoft Office products.
~~13.~~14. Data entry skills including speed and accuracy.

~~14.~~15. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to sit or stand; use hands to finger, handle, or feel; and reach with hands and arms. The employee must occasionally walk and lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and ability to adjust focus.

~~15.~~16. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The work environment is usually well lit, heated and/or air-conditioned indoor office setting with adequate ventilation. The noise level in the work environment is usually moderate. This position requires occasional travel, which may involve exposure to extreme weather conditions.

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Employee Signature: _____ **Date:** _____

Revision Records			
Revision Number	**Author**	**Date**	**Description**
0	TAG	06/01/2019	Created

Job Description

Job Title:	**Office Assistant**	**Job Grade:**	**13**
FLSA Status:	**Non-Exempt**	**Reports To:**	**Executive Director**
Approved By:		**Date:**	**06/01/2019**

Job Purpose: The Office Assistant meets customers when they enter the office. This position is also responsible for answering questions and other office related tasks.

Essential Functions include the following. Other duties may be assigned.

1. Prepares schedules, makes posters for advertising events and helps with Meals on Wheels labels and route sheets.
2. Schedules volunteer receptionist work schedules on a monthly basis and finds substitutes as needed.
3. Works at the front desk in the absence of the volunteer receptionist.
4. Answers phones when necessary.
5. Assists the public needing help and treats everyone graciously and answer questions as they arise. If unable to answer questions, refer customers to someone who can answer their questions.
6. Coordinates rental of buildings and key distribution as well as handles associated funds.
7. Organizes assigned programming and set-up of room(s) by moving tables and chairs to set up for each separate activity, pushing pianos from one location to another in the building and moving TV/VCRs on cart from one location to another across carpeted floors.
8. Manages commodities program and distributes farmer's market coupons in summer.
9. Sorts through donated items.
10. Assists the Executive Director and Assistant Director with assigned work.
11. Inspects AEDs daily and fire extinguishers monthly to make sure they are working properly. Initials after each inspection.

Additional Responsibilities:

1. Performs additional duties as assigned.

Qualifications and Requirements: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

1. High school diploma or GED; Associate's degree in business preferred and at least 3 years of experience that is directly related to the duties and responsibilities specified.
2. Excellent customer service skills with the ability to interact in a positive and professional manner to develop and maintain strong working relationships with customers, co-workers, and management.
3. Excellent written and verbal communication skills, to include quality telephone skills, with the ability to clearly communicate information to customers, co-workers and management.
4. Ability to use basic office equipment, such as copy machine, fax machine, computer, printer, adding machine, and telephone system and operate computer software, to include, Microsoft Office products.
5. Data entry skills including speed and accuracy.
6. Requires a valid Kansas Driver's license, an MVR with good driving record and verifiable insurance.
7. The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to talk and hear. The employee frequently is required to sit or stand; use hands to finger, handle, or feel; and reach with hands and arms. The employee must occasionally walk and lift and/or move up to 40 pounds. Specific vision abilities required by this job include close vision, distance vision, peripheral vision, depth perception, and ability to adjust focus.
8. The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. The work environment is usually well lit, heated and/or air-conditioned indoor office setting with adequate ventilation. The noise level in the work environment is usually moderate. This position requires no travel.

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Job Description

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Employee Signature: _____ **Date:** _____

Revision Records

Revision Number	Author	Date	Description
0	TAG	06/01/2019	Created

Accounting Clerk and Senior Center Director
Performance Evaluation
FCC-0001.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☐ 90 Day ☐ Annual ☐ End of Internship

Instructions: Complete this Performance Evaluation for the above employee. Please write legibly. Do not use pencil. Please review the entire document carefully before beginning. Illustrate specific, detailed examples of goals, results and job related behavior since the last evaluation. Ratings must support and be substantiated by narrative comments. Continue comments on a separate sheet if needed. Completed evaluations will be reviewed before discussing with the employee to evaluate ratings and comments to ensure objectivity, lack of rater errors, and consistency; any wage recommendations should be consistent with the guidelines set in the Wage and Salary Administration Policy in the Employee Handbook. After approval, the evaluation will be reviewed with the employee. It is important to establish agreed upon objectives for the next year as well as training plans for each member of your team. Measurement of competencies should be based on criteria defined in the job description for this position.

PERFORMANCE EXPECTATIONS - RATINGS						
Rating Scale / Performance Criteria	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
	Individual does not meet most of the expectations. *Work requires review. Continuous supervision/ guidance is required and immediate actin is needed. Continual performance at this level may result in termination.*	Individual meets some expectations or is inconsistent in achieving one or more results or objectives. *Supervision/guidance is required and performance needs improvement. May require training in specific area of the job.*	Individual is fully proficient; consistently and effectively achieves objectives and expectations. *Is competent and fully proficient; seldom requires assistance or instruction.*	Individual consistently meets all expectations and exceeds most. *Performance is above average and work goes beyond the job description. Only requires assistance and instruction for complex issues.*	Individual is considered an expert or role model; flawlessly and consistently exceeds all expectations. *Exemplifies performance that far exceeds standards or expectations. Provides an example to which other employees can aspire.*	
1. **Safety:** Commitment to workplace safety to include general safety performance, attitude and behaviors toward organizational safety policies, procedures, goals and objectives.	Does NOT set a good safety example. Does NOT follow applicable safe work rules and best practices. Takes unnecessary risks. Does NOT participate in safety meetings. Fails to report accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.				Sets a good safety example. Follows applicable safe work rules and best practices. Avoids unnecessary risks. Participates in safety meetings. Promptly reports ANY accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.	
Performance examples to support your rating:						
2. **Knowledge:** Knowledge of techniques, skills, equipment, procedures, and services provided. The degree of understanding of the job and related functions. Demonstrates competence in required skills and knowledge.	Poor understanding of job. Fails to respond to new ideas, methods, and procedures.	Lacks knowledge of some phases of job and related functions. Has trouble in grasping new ideas.	Understands job and most related functions. Can answer most questions. Able to learn with little difficulty.	Excellent understanding of job and related functions. Well informed. Learns quickly.	Demonstrates complete mastery of all phases of job and related functions. Learns and implements new techniques extremely quickly.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
3. **Cooperation:** Willingness to work harmoniously w/ others in getting a job done. Readiness to respond positively to instructions/procedures. Interacts w/ internal and external customers with cooperativeness, tact and courtesy.	Has difficulty relating to others. Is often discourteous and uncooperative. Often unwilling to follow instructions and directions.	Is occasionally discourteous and uncooperative. Sometimes demonstrates unwillingness to follow instructions and directions.	Is generally courteous and cooperative. Accepts instructions and directions willingly.	Above average courtesy extended to others. Demonstrates high level of interest in performance. Facilitates cooperation.	Exceptionally courteous and cooperative with internal and external customers in the performance of duties. Consistently strives for higher level of performance. Excels in interpersonal relations.	
Performance examples to support your rating:						
4. **Communication Skills:** Transmits verbal and written information, ideas, and instructions so they are clearly understood. Demonstrates a level of listening skill such that customer and co-worker needs are understood and resolved. Communicates respect for and recognition of the contributions of individuals at all levels of the organization.	Does not meet verbal or written skill requirements for the position. Does not display listening and comprehension skills necessary to accomplish the job satisfactorily. Frequently fails to keep others informed.	Does not always communicate effectively, either verbally or in writing. Does not always display good listening and comprehension skills. Written communications are often unclear and contain grammatical errors. Has trouble keeping others informed.	Displays verbal and written communication skills which meet the requirements of position. Listens and comprehends well. Very few errors in written communications. Usually keeps others well informed.	Displays above-average verbal and written communication skills. Pays attention to what others say. Makes effort to ask appropriate questions. Makes effort to edit written work, minimizing grammatical errors and ambiguous statements. Keeps others well informed.	Displays superior verbal and written communication skills. Listens carefully and asks appropriate questions. Written communications are always error-free and clear. Always keeps others well informed.	
Performance examples to support your rating:						
5. **Reliability:** The extent to which the employee can be depended upon to be willing to work, do it properly, and complete it on time. Faithfulness in coming to work daily and conforming to scheduled work hours.	Unable to meet work demands. Evades responsibility. Unacceptable number of absences. Frequently late.	Sometimes unable to meet normal work demands. Occasionally unwilling to accept responsibility for actions and outcomes. Often absent or late.	Meets normal work demands. Accepts responsibility for actions and outcomes. Meets acceptable attendance and punctuality standards.	Exceeds normal work demands. Regularly assumes responsibility for actions and outcomes. Generally present and punctual.	Far exceeds normal work demands. Always assumes full responsibility for actions and outcomes. Always present and punctual.	
Performance examples to support your rating:						
6. **Initiative:** The ability to plan work and to go ahead with a task without being told every detail, and the ability to make constructive suggestions. Self-starting and assumes responsibilities when specific directions are lacking. Able to follow through on assignments and take appropriate action with the appropriate amount of supervision for this position.	Requires close and constant supervision. Waits to be told what to do.	Has problems completing most assignments without continuous supervision. Seldom acts independently.	Follows through on most assignments independently.	Follows through on assignments with minimal supervision. Above-average level of independence.	Exceptionally self-reliant; completely follows through on assignments.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
7. **Quality of Work:** Freedom from errors and mistakes. The extent to which accuracy, clarity, consistency and thoroughness of work are demonstrated in daily work.	Work consistently rejected because of inaccuracies and mistakes.	Does minimally acceptable work. Accuracy of final product often needs revision or correction.	Work meets acceptable standards. Makes only occasional errors.	Work is above average. Seldom makes errors.	Work is exceptionally high quality. Consistently thorough and accurate.	
Performance examples to support your rating:						
8. **Quantity of Work:** The extent to which the expected volume of work is accomplished quickly and accurately. Deadlines are met. Exceeds customers' expectations	Does not produce work at a volume to satisfy needs.	Volume is generally below what is expected to meet needs. Usually spends more time than necessary to complete work.	Produces satisfactory volume of work to meet needs.	Volume of work frequently above expected levels. Consistently exceeds needs.	Produces consistently high volume of work. Extremely productive and fast. Far exceeds needs.	
Performance examples to support your rating:						
9. **Judgment:** Makes timely, sound decisions by careful study of available facts/options. Exhibits appropriate levels of autonomy in judgment and decision making. Exercises good judgment under conditions of uncertainty and limited information.	Cannot make independent decisions. Lack of judgment often results in problem situations. Does not include appropriate people in process. Takes unacceptable length of time to make decisions.	Often requires assistance in making decisions. Frequently makes decisions that are not well thought out. Often leaves appropriate people out of process. Often takes longer than acceptable to reach a decision.	Makes confident decisions in most areas of job. Decisions generally accurate and sound. Includes appropriate people in most matters. Makes decisions in a timely manner.	Confidently makes decisions within all job areas. Displays reliable judgment skills. Verifies appropriate people are involved in process. Often makes decisions even under tight time frames.	Does not hesitate to make decisions on very challenging matters. Has confidence in own decision-making abilities. Always displays superior judgment. Always brings appropriate people into process at an early stage. Makes decisions even under tightest time frames.	
Performance examples to support your rating:						
10. **Time Management:** The ability to prioritize and plan work and activities, to utilize time efficiently, and to set effective goals and objectives.	Does not plan time, work or priorities satisfactorily. Unable to set goals. Work is disorganized.	Has problems prioritizing, planning, and using time efficiently. Has difficulty setting realistic goals. Work is not always well organized.	Generally prioritizes and plans well. Usually manages time efficiently. Usually able to set realistic, measurable goals.	Very good at prioritizing and planning. Manages time well. Sets realistic goals and objectives.	Excels at prioritizing and planning work. Budgets time for maximum efficiency. Sets challenging specific, achievable goals.	
Performance examples to support your rating:						
11. **Problem Solving:** Identifies problems and defines alternative solutions. Analyzes alternative solutions to determine the best course of action. Considers a broad range of internal and external factors when solving problems.	Unable to identify problems in a timely manner. Analyzation skills are weak. Solutions often cause more problems than they solve.	Often late in identifying problem situations. Analyses are not always thorough. Often unable to develop effective solutions in timely manner.	Identifies most problems within appropriate time frames. Usually develops alternative solutions. Resolves most problems before they grow into larger issues.	Above average skill in identifying, analyzing and solving problems in their early stages. Able to develop several effective solutions.	Excels in immediately identifying, analyzing and effectively solving problems in their earliest stages. Exceptionally adept in developing several alternative solutions.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
12. Professional Development: Extent to which the employee learns more about chosen occupation, obtains new knowledge/ skills/ abilities and improves existing ones. Contributes suggestions, updates, and adheres to Professional Development Plan.	Does not develop professionally. Fails to contribute suggestions, update, and adhere to Professional Development Plan.	Works toward professional development to some degree. Occasionally contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally. Continues to learn and grow. Usually contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally to a considerable degree. Typically seeks out new opportunities to learn appropriate new work-related knowledge/skills/abilities. Frequently contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally to a very high degree. Continually challenging self to advance professional knowledge/skills/abilities. Researches new learning sources and tools. Always contributes suggestions, updates, and adheres to Professional Development Plan.	
Performance examples to support your rating:						
13. Business Planning Skills: Establishes realistic budgets; uses financial and quantitative data effectively to manage. Shows an understanding of issues relevant to the whole organization.	Does not establish and utilize financial and quantitative data satisfactorily. Unable to understand issues relevant to the whole organization.	Has problems establishing and utilizing financial and quantitative data. Has difficulty understanding issues relevant to the whole organization.	Generally establishing and utilizing financial and quantitative data well. Usually has understanding of issues relevant to the whole organization.	Very good at establishing and utilizing financial and quantitative data. Exhibits high degree of understanding of issues relevant to the whole organization.	Excels at establishing and utilizing financial and quantitative data. Exceptional understanding of issues relevant to the whole organization.	
Performance examples to support your rating:						
14. Leadership Skills: Creates a realistic vision of current and future goals for their area of responsibility. Establishes an environment that facilitates successful outcomes through the use of employee involvement, commitment to quality, and continuous improvement. Exhibits confidence in self and others. Inspires respect and trust. Motivates employees to perform well. Reacts professionally under pressure.	Fails to exhibit confidence in self and others. Does not inspire trust or respect of others. Reacts poorly in pressure situations. Does not assume leadership role. Unable to motivate others to perform better.	Does not always display confidence in self and others. Actions occasionally do not inspire trust or respect of others. Sometimes reacts poorly in pressure situations and displays reluctance to assume leadership role. Does not adequately motivate others to perform better.	Exhibits appropriate level of confidence in self and others. Inspires appropriate level of respect and trust of others. Reacts well in stressful situations and shows ability to assume leadership role. Influences others to perform better.	Exhibits high degree of confidence in self and others. Inspires respect and trust of others. Tolerates a great deal of pressure and quickly assumes strong leadership role when action is needed. Motivates others to perform better.	Displays strong confidence in self and others. Inspires utmost respect and trust of others. Provides strong leadership even in highly stressful or crisis situations. Motivates others to perform their best.	
Performance examples to support your rating:						
15. Managing People: Provides direction to staff and gains compliance from them; clearly defines roles and responsibilities. Accurately assesses strengths and development needs of employees, provides specific timely feedback, challenging assignments, and development opportunities. Includes staff in planning and takes responsibility for staff's activities.	Provides unclear direction. Does not gain compliance. Does not sufficiently include staff in planning. Evades responsibility for staff's actions. Does not provide useful feedback. Makes little effort to encourage staff growth.	Sometimes does not provide clear direction. Has trouble gaining compliance. Does not always include staff in planning. Assumes insufficient responsibility for staff's actions. Inconsistent about providing feedback. Spends minimal time developing staff's skills.	Provides direction and is usually able to gain compliance. Includes staff in most planning and takes responsibility for their activities. Provides performance feedback. Provides help to staff in developing their skills.	Provides clear direction and has little problem gaining compliance. Makes sure staff is an important part of planning. Does not hesitate to take appropriate responsibility for staff's activities. Provides valuable performance feedback and makes effort to develop skills of staff.	Excels at providing clear direction and gains compliance quickly. Maximizes participation of staff and takes full responsibility for their activities. Provides regular, consistent feedback. Prepares staff for greater responsibility.	
Performance examples to support your rating:						

GOALS & OBJECTIVES

Results vs. Objectives and Significant Accomplishments

List the objectives that were in place for this year (set at last year's evaluation) in the left-hand column. For each objective, note the corresponding results in the right hand column. Where objectives do not exist (or are not clear) note the significant accomplishments of the employee's performance in the right-hand column.

Last Years Objectives / Goals	Results or Significant Accomplishments

Objectives / Goals for Upcoming Year

Areas of Strength

Areas for Improvement

Career Improvement Recommendations

SUMMARY OF EVALUATION

# Categories	15	Total Rating Points Available	60	Total Rating Points	0	Overall Performance Rating (Total Rating Points / # Rating Categories)	0.00

I have reviewed the foregoing evaluation and acknowledge the items, information and subjects contained herein were discussed with me. Additionally, I acknowledge that I have been encouraged to provide written comments or disagreements regarding this evaluation.

Employee Comments: *(If more space is needed, please use the back side of the evaluation forms or attach comments as additional pages.)*

Employee Signature: _____ **Date:** _____

Employee signature indicates an acknowledgment of the complete evaulation process and does not necessarily represent agreement with the supervisor's ratings or evaluative comments.

Management Signature: _____ **Date:** _____

Reviewed for Consistency: _____ **Date:** _____

Accounting Clerk and Senior Center Director
Performance Evaluation
FCC-0001.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☑ **Self Evaluation**

Instructions: The performance evaluation is a communication tool designed to support each individual's contribution to the Company. The evaluation provides a way to measure skills and accomplishments with reasonable accuracy and uniformity. It provides you with a tool to help identify barriers to top performance. It should help identify areas for professional growth. The objective of this summary is to provide an opportunity to reflect upon actual work, ensure agreement with your performance manager regarding accomplishments and priorities, and foster effective communications between both. It should not, however, be considered your only communication tool. Open lines of communication throughout the year keep barriers from rising and help to make effective working relationships. Attach any additional pages needed to complete this form. Your completed self-evaluation should be provided to your manager prior to your performance review meeting at a mutually agreed upon time. Measurement of competencies should be based on criteria defined in the job description for this position. Use the following ratings.

SELF-REFLECTION
1. List your most significant accomplishments or contributions during this evaluation period. How do these achievements align with your goals and/or performance objectives?
2. During this evaluation period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If yes, please specify.
3. What activities have you initiated, or actively participated in, in an effort to encourage camaraderie and teamwork with your workgroup and/or office? What was the result?
4. To which of the following would you attribute your development during this evaluation period: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, better understanding of job, other - please describe.
5. Describe areas you feel require improvement in terms of your capabilities. List the steps you plan to take and/or the resources you need to accomplish this.
6. Studies have shown that high customer satisfaction and employee satisfaction are closely linked. What are your ideas for improving the Company's client and/or employee satisfaction and retention?

Executive Director
Performance Evaluation
FCC-0006.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☐ 90 Day ☐ Annual ☐ End of Internship

Instructions: Complete this Performance Evaluation for the above employee. Please write legibly. Do not use pencil. Please review the entire document carefully before beginning. Illustrate specific, detailed examples of goals, results and job related behavior since the last evaluation. Ratings must support and be substantiated by narrative comments. Continue comments on a separate sheet if needed. Completed evaluations will be reviewed before discussing with the employee to evaluate ratings and comments to ensure objectivity, lack of rater errors, and consistency; any wage recommendations should be consistent with the guidelines set in the Wage and Salary Administration Policy in the Employee Handbook. After approval, the evaluation will be reviewed with the employee. It is important to establish agreed upon objectives for the next year as well as training plans for each member of your team. Measurement of competencies should be based on criteria defined in the job description for this position.

PERFORMANCE EXPECTATIONS - RATINGS						
Rating Scale / Performance Criteria	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
	Individual does not meet most of the expectations. *Work requires review. Continuous supervision/ guidance is required and immediate actin is needed. Continual performance at this level may result in termination.*	Individual meets some expectations or is inconsistent in achieving one or more results or objectives. *Supervision/guidance is required and performance needs improvement. May require training in specific area of the job.*	Individual is fully proficient; consistently and effectively achieves objectives and expectations. *Is competent and fully proficient; seldom requires assistance or instruction.*	Individual consistently meets all expectations and exceeds most. *Performance is above average and work goes beyond the job description. Only requires assistance and instruction for complex issues.*	Individual is considered an expert or role model; flawlessly and consistently exceeds all expectations. *Exemplifies performance that far exceeds standards or expectations. Provides an example to which other employees can aspire.*	
1. **Safety:** Commitment to workplace safety to include general safety performance, attitude and behaviors toward organizational safety policies, procedures, goals and objectives.	Does NOT set a good safety example. Does NOT follow applicable safe work rules and best practices. Takes unnecessary risks. Does NOT participate in safety meetings. Fails to report accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.				Sets a good safety example. Follows applicable safe work rules and best practices. Avoids unnecessary risks. Participates in safety meetings. Promptly reports ANY accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.	
Performance examples to support your rating:						
2. **Knowledge:** Knowledge of techniques, skills, equipment, procedures, and services provided. The degree of understanding of the job and related functions. Demonstrates competence in required skills and knowledge.	Poor understanding of job. Fails to respond to new ideas, methods, and procedures.	Lacks knowledge of some phases of job and related functions. Has trouble in grasping new ideas.	Understands job and most related functions. Can answer most questions. Able to learn with little difficulty.	Excellent understanding of job and related functions. Well informed. Learns quickly.	Demonstrates complete mastery of all phases of job and related functions. Learns and implements new techniques extremely quickly.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
3. **Cooperation:** Willingness to work harmoniously w/ others in getting a job done. Readiness to respond positively to instructions/procedures. Interacts w/ internal and external customers with cooperativeness, tact and courtesy.	Has difficulty relating to others. Is often discourteous and uncooperative. Often unwilling to follow instructions and directions.	Is occasionally discourteous and uncooperative. Sometimes demonstrates unwillingness to follow instructions and directions.	Is generally courteous and cooperative. Accepts instructions and directions willingly.	Above average courtesy extended to others. Demonstrates high level of interest in performance. Facilitates cooperation.	Exceptionally courteous and cooperative with internal and external customers in the performance of duties. Consistently strives for higher level of performance. Excels in interpersonal relations.	
Performance examples to support your rating:						
4. **Communication Skills:** Transmits verbal and written information, ideas, and instructions so they are clearly understood. Demonstrates a level of listening skill such that customer and co-worker needs are understood and resolved. Communicates respect for and recognition of the contributions of individuals at all levels of the organization.	Does not meet verbal or written skill requirements for the position. Does not display listening and comprehension skills necessary to accomplish the job satisfactorily. Frequently fails to keep others informed.	Does not always communicate effectively, either verbally or in writing. Does not always display good listening and comprehension skills. Written communications are often unclear and contain grammatical errors. Has trouble keeping others informed.	Displays verbal and written communication skills which meet the requirements of position. Listens and comprehends well. Very few errors in written communications. Usually keeps others well informed.	Displays above-average verbal and written communication skills. Pays attention to what others say. Makes effort to ask appropriate questions. Makes effort to edit written work, minimizing grammatical errors and ambiguous statements. Keeps others well informed.	Displays superior verbal and written communication skills. Listens carefully and asks appropriate questions. Written communications are always error-free and clear. Always keeps others well informed.	
Performance examples to support your rating:						
5. **Reliability:** The extent to which the employee can be depended upon to be willing to work, do it properly, and complete it on time. Faithfulness in coming to work daily and conforming to scheduled work hours.	Unable to meet work demands. Evades responsibility. Unacceptable number of absences. Frequently late.	Sometimes unable to meet normal work demands. Occasionally unwilling to accept responsibility for actions and outcomes. Often absent or late.	Meets normal work demands. Accepts responsibility for actions and outcomes. Meets acceptable attendance and punctuality standards.	Exceeds normal work demands. Regularly assumes responsibility for actions and outcomes. Generally present and punctual.	Far exceeds normal work demands. Always assumes full responsibility for actions and outcomes. Always present and punctual.	
Performance examples to support your rating:						
6. **Initiative:** The ability to plan work and to go ahead with a task without being told every detail, and the ability to make constructive suggestions. Self-starting and assumes responsibilities when specific directions are lacking. Able to follow through on assignments and take appropriate action with the appropriate amount of supervision for this position.	Requires close and constant supervision. Waits to be told what to do.	Has problems completing most assignments without continuous supervision. Seldom acts independently.	Follows through on most assignments independently.	Follows through on assignments with minimal supervision. Above-average level of independence.	Exceptionally self-reliant; completely follows through on assignments.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
7. **Quality of Work:** Freedom from errors and mistakes. The extent to which accuracy, clarity, consistency and thoroughness of work are demonstrated in daily work.	Work consistently rejected because of inaccuracies and mistakes.	Does minimally acceptable work. Accuracy of final product often needs revision or correction.	Work meets acceptable standards. Makes only occasional errors.	Work is above average. Seldom makes errors.	Work is exceptionally high quality. Consistently thorough and accurate.	
Performance examples to support your rating:						
8. **Quantity of Work:** The extent to which the expected volume of work is accomplished quickly and accurately. Deadlines are met. Exceeds customers' expectations	Does not produce work at a volume to satisfy needs.	Volume is generally below what is expected to meet needs. Usually spends more time than necessary to complete work.	Produces satisfactory volume of work to meet needs.	Volume of work frequently above expected levels. Consistently exceeds needs.	Produces consistently high volume of work. Extremely productive and fast. Far exceeds needs.	
Performance examples to support your rating:						
9. **Judgment:** Makes timely, sound decisions by careful study of available facts/options. Exhibits appropriate levels of autonomy in judgment and decision making. Exercises good judgment under conditions of uncertainty and limited information.	Cannot make independent decisions. Lack of judgment often results in problem situations. Does not include appropriate people in process. Takes unacceptable length of time to make decisions.	Often requires assistance in making decisions. Frequently makes decisions that are not well thought out. Often leaves appropriate people out of process. Often takes longer than acceptable to reach a decision.	Makes confident decisions in most areas of job. Decisions generally accurate and sound. Includes appropriate people in most matters. Makes decisions in a timely manner.	Confidently makes decisions within all job areas. Displays reliable judgment skills. Verifies appropriate people are involved in process. Often makes decisions even under tight time frames.	Does not hesitate to make decisions on very challenging matters. Has confidence in own decision-making abilities. Always displays superior judgment. Always brings appropriate people into process at an early stage. Makes decisions even under tightest time frames.	
Performance examples to support your rating:						
10. **Time Management:** The ability to prioritize and plan work and activities, to utilize time efficiently, and to set effective goals and objectives.	Does not plan time, work or priorities satisfactorily. Unable to set goals. Work is disorganized.	Has problems prioritizing, planning, and using time efficiently. Has difficulty setting realistic goals. Work is not always well organized.	Generally prioritizes and plans well. Usually manages time efficiently. Usually able to set realistic, measurable goals.	Very good at prioritizing and planning. Manages time well. Sets realistic goals and objectives.	Excels at prioritizing and planning work. Budgets time for maximum efficiency. Sets challenging specific, achievable goals.	
Performance examples to support your rating:						
11. **Problem Solving:** Identifies problems and defines alternative solutions. Analyzes alternative solutions to determine the best course of action. Considers a broad range of internal and external factors when solving problems.	Unable to identify problems in a timely manner. Analyzation skills are weak. Solutions often cause more problems than they solve.	Often late in identifying problem situations. Analyses are not always thorough. Often unable to develop effective solutions in timely manner.	Identifies most problems within appropriate time frames. Usually develops alternative solutions. Resolves most problems before they grow into larger issues.	Above average skill in identifying, analyzing and solving problems in their early stages. Able to develop several effective solutions.	Excels in immediately identifying, analyzing and effectively solving problems in their earliest stages. Exceptionally adept in developing several alternative solutions.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
12. Professional Development: Extent to which the employee learns more about chosen occupation, obtains new knowledge/ skills/ abilities and improves existing ones. Contributes suggestions, updates, and adheres to Professional Development Plan.	Does not develop professionally. Fails to contribute suggestions, update, and adhere to Professional Development Plan.	Works toward professional development to some degree. Occasionally contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally. Continues to learn and grow. Usually contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally to a considerable degree. Typically seeks out new opportunities to learn appropriate new work-related knowledge/skills/abilities. Frequently contributes suggestions, updates, and adheres to Professional Development Plan.	Works to develop professionally to a very high degree. Continually challenging self to advance professional knowledge/skills/abilities. Researches new learning sources and tools. Always contributes suggestions, updates, and adheres to Professional Development Plan.	
Performance examples to support your rating:						
13. Business Planning Skills: Establishes realistic budgets; uses financial and quantitative data effectively to manage. Shows an understanding of issues relevant to the whole organization.	Does not establish and utilize financial and quantitative data satisfactorily. Unable to understand issues relevant to the whole organization.	Has problems establishing and utilizing financial and quantitative data. Has difficulty understanding issues relevant to the whole organization.	Generally establishing and utilizing financial and quantitative data well. Usually has understanding of issues relevant to the whole organization.	Very good at establishing and utilizing financial and quantitative data. Exhibits high degree of understanding of issues relevant to the whole organization.	Excels at establishing and utilizing financial and quantitative data. Exceptional understanding of issues relevant to the whole organization.	
Performance examples to support your rating:						
14. Leadership Skills: Creates a realistic vision of current and future goals for their area of responsibility. Establishes an environment that facilitates successful outcomes through the use of employee involvement, commitment to quality, and continuous improvement. Exhibits confidence in self and others. Inspires respect and trust. Motivates employees to perform well. Reacts professionally under pressure.	Fails to exhibit confidence in self and others. Does not inspire trust or respect of others. Reacts poorly in pressure situations. Does not assume leadership role. Unable to motivate others to perform better.	Does not always display confidence in self and others. Actions occasionally do not inspire trust or respect of others. Sometimes reacts poorly in pressure situations and displays reluctance to assume leadership role. Does not adequately motivate others to perform better.	Exhibits appropriate level of confidence in self and others. Inspires appropriate level of respect and trust of others. Reacts well in stressful situations and shows ability to assume leadership role. Influences others to perform better.	Exhibits high degree of confidence in self and others. Inspires respect and trust of others. Tolerates a great deal of pressure and quickly assumes strong leadership role when action is needed. Motivates others to perform better.	Displays strong confidence in self and others. Inspires utmost respect and trust of others. Provides strong leadership even in highly stressful or crisis situations. Motivates others to perform their best.	
Performance examples to support your rating:						
15. Managing People: Provides direction to staff and gains compliance from them; clearly defines roles and responsibilities. Accurately assesses strengths and development needs of employees, provides specific timely feedback, challenging assignments, and development opportunities. Includes staff in planning and takes responsibility for staff's activities.	Provides unclear direction. Does not gain compliance. Does not sufficiently include staff in planning. Evades responsibility for staff's actions. Does not provide useful feedback. Makes little effort to encourage staff growth.	Sometimes does not provide clear direction. Has trouble gaining compliance. Does not always include staff in planning. Assumes insufficient responsibility for staff's actions. Inconsistent about providing feedback. Spends minimal time developing staff's skills.	Provides direction and is usually able to gain compliance. Includes staff in most planning and takes responsibility for their activities. Provides performance feedback. Provides help to staff in developing their skills.	Provides clear direction and has little problem gaining compliance. Makes sure staff is an important part of planning. Does not hesitate to take appropriate responsibility for staff's activities. Provides valuable performance feedback and makes effort to develop skills of staff.	Excels at providing clear direction and gains compliance quickly. Maximizes participation of staff and takes full responsibility for their activities. Provides regular, consistent feedback. Prepares staff for greater responsibility.	
Performance examples to support your rating:						

GOALS & OBJECTIVES

Results vs. Objectives and Significant Accomplishments

List the objectives that were in place for this year (set at last year's evaluation) in the left-hand column. For each objective, note the corresponding results in the right hand column. Where objectives do not exist (or are not clear) note the significant accomplishments of the employee's performance in the right-hand column.

Last Years Objectives / Goals	Results or Significant Accomplishments

Objectives / Goals for Upcoming Year

Areas of Strength

Areas for Improvement

Career Improvement Recommendations

SUMMARY OF EVALUATION

# Categories	15	Total Rating Points Available	60	Total Rating Points	0	Overall Performance Rating (Total Rating Points / # Rating Categories)	0.00

I have reviewed the foregoing evaluation and acknowledge the items, information and subjects contained herein were discussed with me. Additionally, I acknowledge that I have been encouraged to provide written comments or disagreements regarding this evaluation.

Employee Comments: *(If more space is needed, please use the back side of the evaluation forms or attach comments as additional pages.)*

Employee Signature: _____ **Date:** _____

Employee signature indicates an acknowledgment of the complete evaulation process and does not necessarily represent agreement with the supervisor's ratings or evaluative comments.

Management Signature: _____ **Date:** _____

Reviewed for Consistency: _____ **Date:** _____

Executive Director
Performance Evaluation
FCC-0006.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☑ **Self Evaluation**

Instructions: The performance evaluation is a communication tool designed to support each individual's contribution to the Company. The evaluation provides a way to measure skills and accomplishments with reasonable accuracy and uniformity. It provides you with a tool to help identify barriers to top performance. It should help identify areas for professional growth. The objective of this summary is to provide an opportunity to reflect upon actual work, ensure agreement with your performance manager regarding accomplishments and priorities, and foster effective communications between both. It should not, however, be considered your only communication tool. Open lines of communication throughout the year keep barriers from rising and help to make effective working relationships. Attach any additional pages needed to complete this form. Your completed self-evaluation should be provided to your manager prior to your performance review meeting at a mutually agreed upon time. Measurement of competencies should be based on criteria defined in the job description for this position. Use the following ratings.

SELF-REFLECTION
1. List your most significant accomplishments or contributions during this evaluation period. How do these achievements align with your goals and/or performance objectives?
2. During this evaluation period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If yes, please specify.
3. What activities have you initiated, or actively participated in, in an effort to encourage camaraderie and teamwork with your workgroup and/or office? What was the result?
4. To which of the following would you attribute your development during this evaluation period: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, better understanding of job, other - please describe.
5. Describe areas you feel require improvement in terms of your capabilities. List the steps you plan to take and/or the resources you need to accomplish this.
6. Studies have shown that high customer satisfaction and employee satisfaction are closely linked. What are your ideas for improving the Company's client and/or employee satisfaction and retention?

Office Assistant
Performance Evaluation
FCC-0013.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☐ **90 Day** ☐ **Annual** ☐ **End of Internship**

Instructions: Complete this Performance Evaluation for the above employee. Please write legibly. Do not use pencil. Please review the entire document carefully before beginning. Illustrate specific, detailed examples of goals, results and job related behavior since the last evaluation. Ratings must support and be substantiated by narrative comments. Continue comments on a separate sheet if needed. Completed evaluations will be reviewed before discussing with the employee to evaluate ratings and comments to ensure objectivity, lack of rater errors, and consistency; any wage recommendations should be consistent with the guidelines set in the Wage and Salary Administration Policy in the Employee Handbook. After approval, the evaluation will be reviewed with the employee. It is important to establish agreed upon objectives for the next year as well as training plans for each member of your team. Measurement of competencies should be based on criteria defined in the job description for this position.

PERFORMANCE EXPECTATIONS - RATINGS

Rating Scale / Performance Criteria	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
	Individual does not meet most of the expectations. *Work requires review. Continuous supervision/ guidance is required and immediate acting is needed. Continual performance at this level may result in termination.*	Individual meets some expectations or is inconsistent in achieving one or more results or objectives. *Supervision/guidance is required and performance needs improvement. May require training in specific area of the job.*	Individual is fully proficient; consistently and effectively achieves objectives and expectations. *Is competent and fully proficient; seldom requires assistance or instruction.*	Individual consistently meets all expectations and exceeds most. *Performance is above average and work goes beyond the job description. Only requires assistance and instruction for complex issues.*	Individual is considered an expert or role model; flawlessly and consistently exceeds all expectations. *Exemplifies performance that far exceeds standards or expectations. Provides an example to which other employees can aspire.*	
1. **Safety:** Commitment to workplace safety to include general safety performance, attitude and behaviors toward organizational safety policies, procedures, goals and objectives.	Does NOT set a good safety example. Does NOT follow applicable safe work rules and best practices. Takes unnecessary risks. Does NOT participate in safety meetings. Fails to report accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.				Sets a good safety example. Follows applicable safe work rules and best practices. Avoids unnecessary risks. Participates in safety meetings. Promptly reports ANY accidents, injuries, close calls, unsafe work practices, unsafe conditions, threatening behaviors and emergencies to supervisor, Safety Manager and/or HR department.	
Performance examples to support your rating:						
2. **Knowledge:** Knowledge of techniques, skills, equipment, procedures, and services provided. The degree of understanding of the job and related functions. Demonstrates competence in required skills and knowledge.	Poor understanding of job. Fails to respond to new ideas, methods, and procedures.	Lacks knowledge of some phases of job and related functions. Has trouble in grasping new ideas.	Understands job and most related functions. Can answer most questions. Able to learn with little difficulty.	Excellent understanding of job and related functions. Well informed. Learns quickly.	Demonstrates complete mastery of all phases of job and related functions. Learns and implements new techniques extremely quickly.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
3. **Cooperation:** Willingness to work harmoniously w/ others in getting a job done. Readiness to respond positively to instructions/procedures. Interacts w/ internal and external customers with cooperativeness, tact and courtesy.	Has difficulty relating to others. Is often discourteous and uncooperative. Often unwilling to follow instructions and directions.	Is occasionally discourteous and uncooperative. Sometimes demonstrates unwillingness to follow instructions and directions.	Is generally courteous and cooperative. Accepts instructions and directions willingly.	Above average courtesy extended to others. Demonstrates high level of interest in performance. Facilitates cooperation.	Exceptionally courteous and cooperative with internal and external customers in the performance of duties. Consistently strives for higher level of performance. Excels in interpersonal relations.	
Performance examples to support your rating:						
4. **Communication Skills:** Transmits verbal and written information, ideas, and instructions so they are clearly understood. Demonstrates a level of listening skill such that customer and co-worker needs are understood and resolved. Communicates respect for and recognition of the contributions of individuals at all levels of the organization.	Does not meet verbal or written skill requirements for the position. Does not display listening and comprehension skills necessary to accomplish the job satisfactorily. Frequently fails to keep others informed.	Does not always communicate effectively, either verbally or in writing. Does not always display good listening and comprehension skills. Written communications are often unclear and contain grammatical errors. Has trouble keeping others informed.	Displays verbal and written communication skills which meet the requirements of position. Listens and comprehends well. Very few errors in written communications. Usually keeps others well informed.	Displays above-average verbal and written communication skills. Pays attention to what others say. Makes effort to ask appropriate questions. Makes effort to edit written work, minimizing grammatical errors and ambiguous statements. Keeps others well informed.	Displays superior verbal and written communication skills. Listens carefully and asks appropriate questions. Written communications are always error-free and clear. Always keeps others well informed.	
Performance examples to support your rating:						
5. **Reliability:** The extent to which the employee can be depended upon to be willing to work, do it properly, and complete it on time. Faithfulness in coming to work daily and conforming to scheduled work hours.	Unable to meet work demands. Evades responsibility. Unacceptable number of absences. Frequently late.	Sometimes unable to meet normal work demands. Occasionally unwilling to accept responsibility for actions and outcomes. Often absent or late.	Meets normal work demands. Accepts responsibility for actions and outcomes. Meets acceptable attendance and punctuality standards.	Exceeds normal work demands. Regularly assumes responsibility for actions and outcomes. Generally present and punctual.	Far exceeds normal work demands. Always assumes full responsibility for actions and outcomes. Always present and punctual.	
Performance examples to support your rating:						
6. **Initiative:** The ability to plan work and to go ahead with a task without being told every detail, and the ability to make constructive suggestions. Self-starting and assumes responsibilities when specific directions are lacking. Able to follow through on assignments and take appropriate action with the appropriate amount of supervision for this position.	Requires close and constant supervision. Waits to be told what to do.	Has problems completing most assignments without continuous supervision. Seldom acts independently.	Follows through on most assignments independently.	Follows through on assignments with minimal supervision. Above-average level of independence.	Exceptionally self-reliant; completely follows through on assignments.	
Performance examples to support your rating:						

Performance Criteria \ Scale	0 - Unsatisfactory	1 - Below Expectations / Needs Improvement	2 - Meets Expectations	3 - Above Expectations	4 - Exceptional	Rating
7. **Quality of Work:** Freedom from errors and mistakes. The extent to which accuracy, clarity, consistency and thoroughness of work are demonstrated in daily work.	Work consistently rejected because of inaccuracies and mistakes.	Does minimally acceptable work. Accuracy of final product often needs revision or correction.	Work meets acceptable standards. Makes only occasional errors.	Work is above average. Seldom makes errors.	Work is exceptionally high quality. Consistently thorough and accurate.	
Performance examples to support your rating:						
8. **Quantity of Work:** The extent to which the expected volume of work is accomplished quickly and accurately. Deadlines are met. Exceeds customers' expectations	Does not produce work at a volume to satisfy needs.	Volume is generally below what is expected to meet needs. Usually spends more time than necessary to complete work.	Produces satisfactory volume of work to meet needs.	Volume of work frequently above expected levels. Consistently exceeds needs.	Produces consistently high volume of work. Extremely productive and fast. Far exceeds needs.	
Performance examples to support your rating:						
9. **Judgment:** Makes timely, sound decisions by careful study of available facts/options. Exhibits appropriate levels of autonomy in judgment and decision making. Exercises good judgment under conditions of uncertainty and limited information.	Cannot make independent decisions. Lack of judgment often results in problem situations. Does not include appropriate people in process. Takes unacceptable length of time to make decisions.	Often requires assistance in making decisions. Frequently makes decisions that are not well thought out. Often leaves appropriate people out of process. Often takes longer than acceptable to reach a decision.	Makes confident decisions in most areas of job. Decisions generally accurate and sound. Includes appropriate people in most matters. Makes decisions in a timely manner.	Confidently makes decisions within all job areas. Displays reliable judgment skills. Verifies appropriate people are involved in process. Often makes decisions even under tight time frames.	Does not hesitate to make decisions on very challenging matters. Has confidence in own decision-making abilities. Always displays superior judgment. Always brings appropriate people into process at an early stage. Makes decisions even under tightest time frames.	
Performance examples to support your rating:						
10. **Time Management:** The ability to prioritize and plan work and activities, to utilize time efficiently, and to set effective goals and objectives.	Does not plan time, work or priorities satisfactorily. Unable to set goals. Work is disorganized.	Has problems prioritizing, planning, and using time efficiently. Has difficulty setting realistic goals. Work is not always well organized.	Generally prioritizes and plans well. Usually manages time efficiently. Usually able to set realistic, measurable goals.	Very good at prioritizing and planning. Manages time well. Sets realistic goals and objectives.	Excels at prioritizing and planning work. Budgets time for maximum efficiency. Sets challenging specific, achievable goals.	
Performance examples to support your rating:						
11. **Problem Solving:** Identifies problems and defines alternative solutions. Analyzes alternative solutions to determine the best course of action. Considers a broad range of internal and external factors when solving problems.	Unable to identify problems in a timely manner. Analyzation skills are weak. Solutions often cause more problems than they solve.	Often late in identifying problem situations. Analyses are not always thorough. Often unable to develop effective solutions in timely manner.	Identifies most problems within appropriate time frames. Usually develops alternative solutions. Resolves most problems before they grow into larger issues.	Above average skill in identifying, analyzing and solving problems in their early stages. Able to develop several effective solutions.	Excels in immediately identifying, analyzing and effectively solving problems in their earliest stages. Exceptionally adept in developing several alternative solutions.	
Performance examples to support your rating:						

Performance examples to support your ratings:	

GOALS & OBJECTIVES

Results vs. Objectives and Significant Accomplishments

List the objectives that were in place for this year (set at last year's evaluation) in the left-hand column. For each objective, note the corresponding results in the right hand column. Where objectives do not exist (or are not clear) note the significant accomplishments of the employee's performance in the right-hand column.

Last Years Objectives / Goals	Results or Significant Accomplishments

Objectives / Goals for Upcoming Year

Areas of Strength

Areas for Improvement

Career Improvement Recommendations

SUMMARY OF EVALUATION

# Categories	11	Total Rating Points Available	44	Total Rating Points	0	Overall Performance Rating (Total Rating Points / # Rating Categories)	0.00

I have reviewed the foregoing evaluation and acknowledge the items, information and subjects contained herein were discussed with me. Additionally, I acknowledge that I have been encouraged to provide written comments or disagreements regarding this evaluation.

Employee Comments: *(If more space is needed, please use the back side of the evaluation forms or attach comments as additional pages.)*

Employee Signature: _____ **Date:** _____

Employee signature indicates an acknowledgment of the complete evaluation process and does not necessarily represent agreement with the supervisor's ratings or evaluative comments.

Management Signature: _____ **Date:** _____

Reviewed for Consistency: _____ **Date:** _____

Office Assistant
Performance Evaluation
FCC-0013.0

Employee Name: _____ **Hire Date:** _____

Evaluation Period: _____ to _____ **Evaluator Name:** _____

Evaluation Type: ☑ **Self Evaluation**

Instructions: The performance evaluation is a communication tool designed to support each individual's contribution to the Company. The evaluation provides a way to measure skills and accomplishments with reasonable accuracy and uniformity. It provides you with a tool to help identify barriers to top performance. It should help identify areas for professional growth. The objective of this summary is to provide an opportunity to reflect upon actual work, ensure agreement with your performance manager regarding accomplishments and priorities, and foster effective communications between both. It should not, however, be considered your only communication tool. Open lines of communication throughout the year keep barriers from rising and help to make effective working relationships. Attach any additional pages needed to complete this form. Your completed self-evaluation should be provided to your manager prior to your performance review meeting at a mutually agreed upon time. Measurement of competencies should be based on criteria defined in the job description for this position. Use the following ratings.

SELF-REFLECTION
1. List your most significant accomplishments or contributions during this evaluation period. How do these achievements align with your goals and/or performance objectives?
2. During this evaluation period, have you successfully performed any new tasks or additional duties outside the scope of your regular responsibilities? If yes, please specify.
3. What activities have you initiated, or actively participated in, in an effort to encourage camaraderie and teamwork with your workgroup and/or office? What was the result?
4. To which of the following would you attribute your development during this evaluation period: offsite seminars/classes (specify if self-directed or required by your supervisor), onsite training, peer training, management coaching or mentoring, on-the-job experience, better exposure to challenging projects, better understanding of job, other - please describe.
5. Describe areas you feel require improvement in terms of your capabilities. List the steps you plan to take and/or the resources you need to accomplish this.
6. Studies have shown that high customer satisfaction and employee satisfaction are closely linked. What are your ideas for improving the Company's client and/or employee satisfaction and retention?
7. State two goals for the coming year and indicate how you plan to accomplish them.