

Office of the General Treasurer

MANAGER ASSESSMENT	
MANAGER NAME	DEPARTMENT
RATING PERIOD	
FROM	TO
GENERAL INSTRUCTIONS	
<p><input type="checkbox"/> THIS FORM IS STRICTLY VOLUNTARY AND IS BEING COMPLETED AS PART OF THE PROCESS OF IMPROVING YOUR MANAGER’S OVERALL JOB PERFORMANCE. THIS COMPLETED FORM WILL BE KEPT CONFIDENTIAL AND YOUR MANAGER WILL NOT SEE THE ACTUAL ASSESSMENT FORM NOR WILL YOUR MANAGER BE INFORMED REGARDING YOUR IDENTITY DURING THE PERFORMANCE REVIEW PROCESS. HOWEVER, YOUR INPUT WILL BE GIVEN SERIOUS CONSIDERATION IN PROVIDING THE MANAGER WITH HIS/HER PERFORMANCE ASSESSMENT .</p> <p><input type="checkbox"/> BASE THE ASSESSMENT ON THE MANAGER’S PERFORMANCE DURING THE REVIEW PERIOD, NOT PERFORMANCE PRIOR TO THE CURRENT REVIEW PERIOD.</p> <p><input type="checkbox"/> COMMENTS MUST BE PROVIDED FOR ALL RATINGS OTHER THAN “MEETS EXPECTATIONS.” ALL COMMENTS ARE TO BE RELEVANT AND JOB RELATED. THE COMMENTS SECTIONS FOR REVIEW FACTORS 1 THROUGH 3 SHOULD BE USED TO SUPPORT ASSESSMENT RATINGS, INDICATE PROBLEM AREAS AND PROVIDE GUIDANCE TO MANAGERS ON HOW TO IMPROVE PERFORMANCE. ADDITIONAL COMMENTS FOR ANY SECTIONS SHOULD BE MADE BY ATTACHING ADDITIONAL 8 1/2 BY 11 PAPER IN SIMILAR FORMAT.</p> <p><input type="checkbox"/> RATE EACH REVIEW FACTOR 1 THROUGH 3 IN RELATION TO THE STANDARDS ESTABLISHED AND THE GUIDELINES LISTED ON THE FORM FOR EACH RATING. REMEMBER, YOUR SPECIFIC COMMENTS ARE IMPORTANT. YOUR COMMENTS SHOULD SUPPORT THE RATING YOU HAVE PROVIDED AND SUGGEST WAYS IN WHICH THE MANAGER CAN IMPROVE HIS/HER PERFORMANCE.</p>	

Office of the General Treasurer

MANAGER ASSESSMENT	
MANAGER NAME:	DEPARTMENT:

1. **SUPERVISION/MANAGEMENT** Effectively manages department, employees and workflow through direction and example.

CONSISTENTLY EXCEEDS EXPECTATIONS 3 <input type="checkbox"/>	MEETS ALL EXPECTATIONS 2 <input type="checkbox"/>	BELOW EXPECTATIONS 1 <input type="checkbox"/>
<ul style="list-style-type: none"> ● Inspires staff through excellent direction, feedback, development and recognition ● Promotes excellence and leads by example ● Exceeds requirements of Treasury policies 	<ul style="list-style-type: none"> ● Provides staff with effective direction, feedback, development, and recognition ● Makes decisions that reflect sound judgment ● Adheres to Treasury policies 	<ul style="list-style-type: none"> ● Fails to provide direction to staff ● Does not follow Treasury policies ● Makes poor decisions

Comments:

EMPLOYEE _____

Rating ___

2. **PLANNING AND ORGANIZATION** Sets goals. Plans and organizes work, coordinates with others and establishes priorities.

CONSISTENTLY EXCEEDS EXPECTATIONS 3 <input type="checkbox"/>	MEETS ALL EXPECTATIONS 2 <input type="checkbox"/>	BELOW EXPECTATIONS 1 <input type="checkbox"/>
<ul style="list-style-type: none"> ● Excellent planning and organization achieve highly successful results ● Outstanding communication skills ● Leads projects that achieve excellent results 	<ul style="list-style-type: none"> ● Provides effective planning and organization for projects ● Communications are easily understood and followed ● Leads projects effectively 	<ul style="list-style-type: none"> ● Disorganized ● Does not understand Treasury priorities ● Fails to communicate plans and expectations

Comments:

EMPLOYEE _____

Rating ___

3. **LEADERSHIP ABILITY** Motivates others to achieve excellence. Demonstrates confidence in self and others. Inspires respect and trust.

CONSISTENTLY EXCEEDS EXPECTATIONS 3 <input type="checkbox"/>	MEETS ALL EXPECTATIONS 2 <input type="checkbox"/>	BELOW EXPECTATIONS 1 <input type="checkbox"/>
<ul style="list-style-type: none"> Leads by example in promoting teamwork and new ideas Motivates others to achieve high performance Inspires respect and trust from other employees 	<ul style="list-style-type: none"> Maintains a positive attitude Encourages teamwork and makes all employees comfortable Shares ideas and helps others achieve their objectives 	<ul style="list-style-type: none"> Has a negative attitude Unable to offer support or assistance to other staff

Comments:

EMPLOYEE _____

Rating _____

4. **CUSTOMER SERVICE** Contributes to a satisfying and sustainable customer experience. Supports proactive customer service practices. Strives for first call/contact resolution.

CONSISTENTLY EXCEEDS EXPECTATIONS 3 <input type="checkbox"/>	MEETS ALL EXPECTATIONS 2 <input type="checkbox"/>	BELOW EXPECTATIONS 1 <input type="checkbox"/>
<ul style="list-style-type: none"> Always makes customer service their highest priority Helps others develop “customer first” attitude Customers seek out this person for assistance 	<ul style="list-style-type: none"> Understands customer needs Solves problems for customers and staff Excellent attitude towards customers 	<ul style="list-style-type: none"> Does not understand customer needs Poor attitude toward customers

Comments:

EMPLOYEE _____

Rating _____

5. **JOB KNOWLEDGE/SKILLS** Demonstrates knowledge and skills necessary to perform tasks and functions of job. Adheres to established policies regarding procedures and makes effective usage of resources.

CONSISTENTLY EXCEEDS EXPECTATIONS 3 <input type="checkbox"/>	MEETS ALL EXPECTATIONS 2 <input type="checkbox"/>	BELOW EXPECTATIONS 1 <input type="checkbox"/>
<ul style="list-style-type: none"> Superior job skills and knowledge; effectively applies them to work assignments Willingly shares knowledge with staff Applies creative solutions to changing job requirements 	<ul style="list-style-type: none"> Possesses full knowledge/skills required for job Stays current with major changes impacting job functions Accepts and quickly adapts to changing requirements 	<ul style="list-style-type: none"> Job knowledge and/or skills to perform job is lacking Rarely takes advantage of training opportunities Often is resistant to changing requirements

Comments:

EMPLOYEE _____

Rating _____

Overall Average Rating _____