

**County of Marin
Performance Planning and Review Form for Managers and Supervisors
PMR 43 - Form 2**

PART I: PERFORMANCE PLANNING

Review Period: to

Employee's Name	<input type="text"/>
Job Classification	<input type="text"/>
Department	<input type="text"/>
Division	<input type="text"/>

Step One: Identify Job Performance Goals

Identify the goals, results, or outcomes for this job for the performance review period.

- 1)
- 2)
- 3)
- 4)

Step Two: Identify Leadership and Professional Development Goals

Collaboratively, with employee, identify training, support, and growth experiences that will support and enhance goal achievement and performance.

- 1)
- 2)
- 3)
- 4)

Signatures:

_____ Supervisor	_____ Date
_____ Employee	_____ Date

Save this form in a secured file to use in Part II when evaluating performance.

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PART II: PERFORMANCE REVIEW

Review Period:

to

Employee's Name

Job Classification

Department

Division

How to Rate Performance by Category

- 1) Refer to the performance and developmental goals established in Part I.
- 2) Review the seven [Performance Categories and Subcategories](#) .
- 3) Compare the employee's performance during the performance review period to each of the seven Performance Categories.
- 4) Review the [Rating Level Definitions](#) and assign the appropriate level for each of the seven categories. The rating levels are:
 - ◆ Outstanding
 - ◆ Exceeds Expectations
 - ◆ Competent and Effective
 - ◆ Needs Improvement
 - ◆ Unsatisfactory
- 5) Support your rating with a specific description of the employee's performance and achievements. Cite examples.

CATEGORY I: LEADERSHIP

- Strategic Planning
- Collaboration
- Initiative/Innovation
- Systems Thinking
- Knowledge Transfer

RATING LEVEL

Support your "Leadership" rating with a specific description of performance. Cite examples.



CATEGORY II: MANAGING WORK

- Achieving Program/Unit Goals
- Ensuring Service Quality
- Planning, Organizing, and Prioritizing
- Managing Financial Resources

RATING LEVEL

Support your "Managing Work" rating with a specific description of performance. Cite examples.

CATEGORY III: INDIVIDUAL CONTRIBUTION

- Achieving Individual Goals
- Quality of Individually-Performed Work

RATING LEVEL

Support your "Individual Contribution" rating with a specific description of performance. Cite examples.

CATEGORY IV: MANAGING EMPLOYEE PERFORMANCE

- Selecting Talent
- Developing Talent
- Maintaining High Standards of Performance
- Evaluating Performance
- Operating within Legal, Labor, and Policy Framework

RATING LEVEL

Support your "Managing Employee Performance" rating with a specific description of performance. Cite examples.

CATEGORY V: MANAGING COMMUNICATION

- Open Communication and Feedback
- Addressing Conflict in the Team
- Conducting Effective Meetings Performance
- Effective Written Communication

RATING LEVEL

Support your "Managing Communication" rating with a specific description of performance. Cite examples.

CATEGORY VI: PROFESSIONALISM

- Integrity and Respect
- Cooperation
- Resilience/Flexibility
- Level of Effort
- Reliability
- Attention to Safety

RATING LEVEL

Support your "Professionalism" rating with a specific description of performance. Cite examples.

CATEGORY VII: DEPARTMENT-SPECIFIC CRITERIA (Optional)

Add criteria not already covered by the six County-wide categories.

- 1)
- 2)
- 3)
- 4)

RATING LEVEL

Support your "Department-Specific" rating with a specific description of performance. Cite examples.

How to Rate Overall Performance

- 1) Review the [Rating Level Definitions](#) for overall performance.
- 2) Consider the employee's overall performance and assign an appropriate rating. The rating levels are:
 - ◆ Outstanding
 - ◆ Exceeds Expectations
 - ◆ Competent and Effective
 - ◆ Needs Improvement
 - ◆ Unsatisfactory

OVERALL RATING LEVEL

Support your "Overall Performance" rating with a specific description of the employee's performance and achievements. Cite examples.

Signatures:

Rater: This performance review is based on my observation and/or knowledge. It represents my best judgment of the employee's performance.

Signed	Title	Date

Department Head or Division Chief: I concur in and approve this performance review.

Signed	Title	Date

Employee: This performance review has been discussed with me and I have been given a copy for my file. I understand that I may write a rebuttal, which becomes a permanent part of this record.

Signed	Rebuttal Attached	Date

(Distribution: Original Copy to Personnel File. One copy to employee and one to supervisor.)

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