

# INSTRUCTIONS FOR COMPLETING PROGRESS REVIEW FORM

August, 2006

The following sections of the Progress Review form are to be completed by the Supervisor preparing and/or conducting the Progress Review—

<b><u>GENERAL INFORMATION SECTION</u></b> (First Page of Progress Review Form):	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
Employee Name:	First and last name of employee being reviewed (please use the employee's name as it appears on their social security card to be consistent with official City records).
Job Title:	Formal title of job class the employee currently holds (job title as listed in H.T.E. or on document entitled "Position Classification Listing." Do not use working title of position.
Department:	Name of Department and Division in which the person being reviewed is currently employed.
Period Review From and To:	Span of time the Progress Review covers—include applicable months, dates and years--typically October 1 <sup>st</sup> through September 30 <sup>th</sup> (City's Fiscal Year).
Date of Evaluation:	Date Progress Review meeting with employee was conducted.
Evaluator Name:	Name of person preparing Progress Review.
Current Pay Grade:	Current pay grade of employee being reviewed.
Pay Grade Quartile:	Pay quartile of employee reviewed (Quartile #1, #2, #3 or #4).

<b><u>PERFORMANCE DIMENSION SECTION:</u></b>	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
Dimension #1, 2, 3, 4 and 5	Simply check box indicating rating for employee during current review period (refer to rating level definitions on first page of Progress Review form).

The following sections of the Progress Review form are to be completed by the Supervisor preparing and/or conducting the Progress Review (continued)--

<b><u>OVERALL PERFORMANCE RATING SECTION:</u></b>	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
Overall Performance Rating	<ul style="list-style-type: none"> <li>• Evaluate ratings given for five preceding performance dimensions for employee being reviewed and check one of the three choices to determine an overall rating for the employee's performance during the current rating period.</li> <li>• The rating categories are defined on the first page of the Progress Review form.</li> <li>• The "Unobserved (UN)" rating choice is not an option for the employee's overall rating.</li> <li>• A written justification for the overall rating is required in the "Comments" section explaining the supervisor's reasoning behind the rating (additional sheets of paper may be attached).</li> </ul>

<b><u>KEY ACCOMPLISHMENTS, AREAS FOR IMPROVEMENT AND RECOMMENDED TRAINING/DEVELOPMENT SECTION:</u></b>	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
Key Accomplishments, Areas for Improvement and Recommended Training and Development	<ul style="list-style-type: none"> <li>• List/summarize employee's key accomplishments during current review period; may ask employee to provide list.</li> <li>• List/summarize areas where employee needs to improve performance based on job performance during current review period.</li> <li>• List training/development areas recommended for employee based on job performance during current review period.</li> <li>• Additional sheet(s) of paper may be attached if more space is needed.</li> </ul>

The following sections of the Progress Review form are to be completed by the Supervisor preparing and/or conducting the Progress Review (continued)--

<b><u>ACKNOWLEDGEMENTS SECTION:</u></b>	
NOTE: The first line in this section is to be completed by the employee, the other lines are to be completed by the supervisor(s) involved in the review, and the department director.	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
Employee Reviewed	Employee reviewed prints name and job title, and signs and dates form acknowledging receipt of the Progress Review from the supervisor.
Supervisor Conducting Review	Supervisor conducting review prints name and job title and signs and dates form acknowledging conduct of Progress Review meeting.
Other Supervisors Providing Input	Each additional supervisor involved in the review prints name and job title and signs and dates form acknowledging their involvement in the employee's Progress Review.
Department Director	Department director of the employee reviewed prints name and job title and signs and dates form acknowledging review of employee's Progress Review.

The following sections of the Progress Review form are to be completed by the employee--

<b><u>EMPLOYEE SECTION:</u></b>	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
"Employee" section	<ul style="list-style-type: none"> <li>• Employee checks "I do" or "I do not" agree box indicating whether he agrees or disagrees with the overall rating.</li> <li>• Employee may provide written comments in "Comments" section supporting why he is in agreement or disagreement with the review.</li> <li>• Additional sheet(s) of paper may be attached if additional space is needed.</li> </ul>

The following sections of the Progress Review form are to be completed by the employee (continued)--

<b><u>CAREER DEVELOPMENT SECTION:</u></b>	
<b>INFORMATION REQUESTED</b>	<b>EXPLANATION</b>
“Career Development” section	<ul style="list-style-type: none"><li>• Employee provides written comments in “Comments” section regarding career development issues (i.e., career goals, request for job-related professional development opportunities, additional training, etc.).</li><li>• Additional sheet(s) of paper may be attached if additional space is required.</li></ul>

NOTE: The Progress Review forms and instructions for completing the forms may be accessed under S/HRFORMS/Progress Reviews