

Planning – January, 2014

Review – June, 2014

Final - December, 2014

Revised -1/22/14

Replaces (TUL-4192 and 4334))

\_\_\_\_REGULAR

\_\_\_\_SPECIAL

**PERFORMANCE PLANNING AND REVIEW RECORD - EXEMPT & NON-EXEMPT**

Employee: \_\_\_\_\_ Department: Park & Recreation

Division: \_\_\_\_\_ Supervisor: \_\_\_\_\_

Classifications: Recreation Coordinator Planning Date: \_\_\_\_\_ Review Date: \_\_\_\_\_

The purpose of the Performance Planning and Review (P.P.R.) process is to improve performance by promoting mutual understanding and agreement between employees and supervisors as to the employee's job responsibilities, key projects and work objectives for the upcoming evaluation period as well as the performance standards to be used in measuring performance.

The steps in the process are as follow:

1. At the start of employment or beginning of a performance evaluation period, the supervisor and employee meet to discuss and record job responsibilities, key projects, work objectives and performance standards and agree on these items as well as developmental activities which are to be reflected on the P.P.R. form. The employee and supervisor should each keep a copy of the form.
2. A subsequent review meeting of the employee and supervisor should be held at least one time during the review period, to review the employee's performance and to discuss any changes in job responsibilities, key projects, work objectives or related standards. (See PPM Section 703.)
3. At the conclusion of the performance evaluation period, the supervisor and employee meet to discuss evaluation of the employee's performance in accordance with established standards. If appropriate, a pay administration decision will be made based, at least in part, on that evaluation.
4. The completed form is submitted to the Human Resources Department with an accompanying Personnel Action form to adjust the employee's pay rate, if appropriate.
5. A new P.P.R. form is completed which again establishes job responsibilities, key projects, work objectives, standards, and developmental activities for the upcoming evaluation period.

**PART I. - JOB RESPONSIBILITIES, KEY PROJECTS, WORK OBJECTIVES AND PERFORMANCE STANDARDS** ("City Values" additions listed as items 1 through 4)

**I. Job Responsibility/Project/Objective (A) Performance Standard (B)**

- 1A. Take personal responsibility for providing internal and external customers with the most cost efficient, prompt, and highest quality services possible.
- 1B. Respond to customer complaints as soon as investigation is finished.
  - Meets:** No more than three substantiated complaints. E-mails are responded to within 24 hours.
  - Meets:** Evaluations will be available on-line for each class in program guide and results recorded.
  - Exceeds:** 85% return on evaluations for all successful programs and activities.
  - Exceeds:** Building will be open a minimum of 65 hours a week including weekends and evenings. No substantiated complaints.

**Rating Comments:**

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2A. Take personal responsibility for seeking continuous improvement in departmental and City work efforts.

2B. Suggest or implement improvements in service delivery.

**Meets:** Two new and original suggestions at the center site are implemented.

**Exceeds:** One idea implemented for the department or four suggestions implemented for the site.

**Rating Comments:**

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3A. Take responsibility for continuous learning; attend appropriate training, education, and apply new and improved job skills.

3B. Attendance of training, education, and review of job skills based behavioral changes.

**Meets:** Current certification in First Aid, CPR, complete 2 job related educational training classes

**Meets:** Consistently track attendance and other weekly reports that are assigned.

**Exceeds:** Become a Certified Instructor in related field, and teach 2 classes.

**Rating Comments:**

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4A. Programs will be monitored and adjusted for optimum enrollment or attendance and value of services.

4B. Programs will use budgets, monthly reports, attendance, questionnaires, and evaluations to measure profitability and customer value.

**Meets:** Conduct a lifecycle evaluation, establishing service objectives for each program listed in the program guide and record monthly.

**Meets:** Revenue targets will be met to comply with budget of classes.

**Exceeds:** Create a timeline for all program planning and give examples of effectiveness. Increase 2013 revenue by an average of 10% per class.

**Rating Comments:**

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5A. Design new customer driven programs at appropriate fees. Program information will be easily accessible and readily available to the public (including date, time, place, cost and events.)

5B. Programs will begin and end on time.

**Meets:** Create classes for Fun Guides one month prior to schedule- July (Fall) October (Winter) February (Spring) April (Summer)

**Meets:** Update Social Media page at least once a week and document. Increase "Friends" by 20%.

**Meets:** Will initiate 6 innovative programs with at least 8 people in attendance. Offer at least one class using the WIN, Fire, Police Dept. or other City department.

- Meets:** Generate on-line brochures for classes as well as postcards and/or e-mails for reminders.
- Exceeds:** More than 10 innovative programs with at least 8 people in attendance. Create at least 1 program for Childhood Obesity month and 1 program for 50+ with at least 8 people in attendance.
- Rating Comments :**

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- 6A. Day Camp program will stay in compliance with ACA standards.
- 6B. Staff will be hired by May 1, 2014. Offer camps and specialized programs during out of school time.
  - Meets:** Oversee day camp budgets for each camp session.
  - Meets:** Background checks for seasonal staff, volunteers or contractors will be on file 48 hrs. before reporting to work.
  - Exceeds:** Add a new theme to the Day Camp theme book for 2014 or submit a minimum of 10 ideas for activities related to 2014 themes.

**Rating Comments:**

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- 7A. Center facilities, grounds and equipment will be safe/clean/well maintained.
- 7B. Inspect, create work orders or perform tasks as needed to insure safe programs and sites.
  - Meets:** No loss of equipment due to negligence. Issue TMAs in a timely manner as needed.
  - Exceeds:** Perform pool checks twice a week if applicable or as assigned. Pool Check should be done by Tuesday each week and documented on pool check form.

**Rating Comments:**

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- 8A. Will follow financial procedures for center and department.
- 8B. Will work within budget allocation for the fiscal year.
  - Meets:** Stay within budget allocation, P-Card log reports correct. Fewer than 5% mistakes in deposits. Overall instructor taught classes will make a 20% profit.
  - Meets:** Deposits and cash reports will be turned in daily.
  - Exceeds:** No mistakes in cash desposits, P-Card logs.

**Rating Comments:**

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- 9A. Will offer Special Event programming
- 9B. Special Events will be offered to the public to all ages at a minimal cost.
  - Meets:** Participate on at least 1 Specialist committee per year.

- Meets:** Assist in 2 Department Special Events or activities and coordinate/ conduct 3 Center Special Events.
- Exceeds:** Will assist in 4 department Special events and coordinate /conduct 5 center events within the fiscal year including 1 new Special events at center.

**Rating Comments:**

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**10A.** Become involved with a neighborhood association and/or community programming.

**10B.** Be recognized as a leadership resource for youth.

- Meets:** Become involved in at least one community outreach program and attend at least 2 meetings/programs
- Exceeds:** Regularly attend 2 outreach programs.

**Rating Comments:**

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**11A.** Take personal responsibility to ensure that subordinates comply with all Safety program accountabilities appropriate to their jobs.

**11B.** Demonstrate a positive safety culture by your actions and decisions. Take prompt action on all safety issues and violations by employees. Alleviate workers compensation cases by being diligent in pre-planning or training.

- Meets:** Have employees attend safety classes that are job specific as offered by COT.
- Exceeds:** Organize and implement a safety class or seminar at your site that all can attend.

**Rating Comments:**

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**PART II. - GENERAL WORK BEHAVIOR RATINGS**

Rate how the employee's on the job behavior conforms to the level expected by the supervisor (as applicable).

**A. Work Habits & Attitudes** (Follows rules and instructions; cooperates; competent.)

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**B. Relationships with Others** (Coworkers; supervisor; public.)

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**C. Personal Qualities** (Dependable; initiative; orderliness.)

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**D. Manager or Supervisor** (Planning, organizing, meeting deadlines)

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**E. Attendance** (Punctual; sick leave use; leave w/o pay use.)

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Sick leave and LWOP Last 12 month \_\_\_\_\_ Accrued Sick leave \_\_\_\_\_

**Part III. -IMPROVEMENT OPPORTUNITIES**

(List any noted opportunities to enhance performance)

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**PART IV. - CAREER GROWTH AND DEVELOPMENTAL OBJECTIVES**

Developmental - Current Position

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**Promotional /Career improvements**

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**PART V. - FINAL RATINGS**

- (E) Exceptional - Performance/skills exceed almost all standards and/or exceed all critical standards.

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- Very Proficient - Performance/skills meet all standards and exceed some standards.
- (P) Proficient - Performance/skills meet standards.
- Need Some Improvement- Performance/skills generally meet standards but slightly below on particular area(s).

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- (I) Inadequate (\*required) - Performance/skills below expected standards in many areas or critical area(s) described under remedial activities.

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\* See Remedial Actions

**REMEDIAL ACTIONS**

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**FINAL RATING COMMENTS**

Employee:

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Supervisor:

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Review Session Supervisor's initial	Date	Review Session Supervisor's initial	Date	Review Session Supervisor's initial	Date
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Employee's initial	Date	Employee's initial	Date	Employee's initial	Date
_____	_____	_____	_____	_____	_____

<b>Planning Session</b> Supervisor's signature	Date	<b>Final Review Session</b> Supervisor's signature	Date
_____	_____	_____	_____
Employee's signature	Date	Employee's signature	Date
_____	_____	_____	_____
Reviewing Official	Date	Reviewing Official	Date
_____	_____	_____	_____