



**EMPLOYEE PERFORMANCE REVIEW  
ACCOUNTING CLERK**

<b>Employee Name:</b>		<b>Date of Review:</b>	
<b>Supervisor:</b>	<b>Finance Director</b>	<b>Dates Covered in Review:</b>	

<b>Type of Review</b>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<b>6 Month</b>	<b>Probation Completion</b>	<b>Progress Update</b>	<b>Annual</b>	<b>Other</b>

<b>Level of Performance:</b>	<b>1</b>	<b>Unacceptable</b>	Performance is of little, if any, value to the City
	<b>2</b>	<b>Fair (Below Standards)</b>	Limited understanding/knowledge. Needs continual guidance and instruction.
	<b>3</b>	<b>Acceptable</b>	Fully competent. Contributes to the ongoing success of the City.
	<b>4</b>	<b>Excellent</b>	Exceeds the acceptable level.
	<b>5</b>	<b>Outstanding</b>	Exceptionally reliable, cooperative, and highly productive in all goals and tasks assigned.

**ELEMENTS:**

<b>A. Customer Service and Communication</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1.	Responds quickly, efficiently, and professionally to requests for information.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Works well with other employees and staff.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Maintains utility billing records and accounts accurately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>B. Reliability</b>		<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1.	Proposes new processes/innovations for the city.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Executes all duties of the position and is able to meet expected deadlines.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Work is thorough and accurate.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4.	Flexible in work schedule and adapts to changes in the work environment.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

<b>C. Productivity</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Ability to cover in the Finance Directors' absence as well as back up the clerk's department when necessary.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Sets up and maintains utility, accounts payable, and accounts receivable accounts. Includes obtaining proper documentation such as W9, Race/Ethnicity Forms, ST3, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Prepares monthly utility bills including meter readings, issuance of bills, entry of receipts, etc.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Coordinates items coming into the finance area and processes accordingly.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Processes accounts payable items timely and appropriately.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Uses the Infraseek System to locate city records.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<b>D. Adherence to Policy</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>
1. Observes all city policies and rules.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
2. Follows the statutes and guidelines for cities.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
3. Follows the water shut-off policy.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
4. Adheres to the record retention schedule.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

**OVERALL LEVEL OF PERFORMANCE:**

Total Maximum Points Available from Elements Section	77	Divide by Number of Questions	1 7	=	
Total Points Awarded					

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**Supervisor Comments:**


**Employee Comments:**


Employee Signature

Date:

Supervisor Signature

Date:



**Employee Self-Assessment:**

<b>Employee Name:</b>		<b>Date of Review:</b>	
<b>Supervisor:</b>		<b>Dates Covered in Review:</b>	

**Employee Instructions:** Complete this review form and return it to Michelle Hayes by June 29, 2023 . Your thorough and timely participation in the appraisal process will help facilitate a fair and comprehensive review of your performance and accomplishments since the last performance review. A copy of this self-assessment will be attached to your review form and filed in your personnel file.

**What do you feel is your biggest accomplishment since your last review? Why?**

<b>Accomplishment</b>	<b>Why</b>

**What Areas are in Need of Improvement? What is your plan to improve?**

<b>Goals</b>	<b>How</b>	<b>Anticipated Completion Date</b>

**Do you have any ideas to make your position more efficient?**


**Any other changes you would like to see?**


**Is there anyone that can provide insight into your performance other than your supervisor?**


## **Evaluation Purpose and Process Defined**

### **Overview:**

The purpose of the employee performance evaluation is to provide a tool between the city management and its employees. Conducting regular performance evaluations provide both supervisor and employee with a structured opportunity to discuss what is going well and not so well.

In addition to being a good communication tool, the performance evaluation is a critical tool for many management personnel decisions. When evaluations are not done regularly, there may be a lack of defensible basis for organization decisions (promotions, terminations, etc.) It is essential to have supporting documentation for these kinds of actions. Performance evaluations are a good source of such documentation.

### **Purpose:**

The purpose of the performance evaluation process is to review with the employees what is expected of them, what they are doing well, how they are deficient in performance (if at all), how they can improve, and what goals they are expected to achieve over the next performance period. Performance evaluations, if done effectively, are a key component of performance management.

The employee shall be rated on items contained in their individual job descriptions as well as overall city policies, or department procedures.

### **Procedure:**

The Supervisor can conduct employee performance reviews at any time during a year and may conduct several during that time; however, they will strive to at a minimum review an employee annually, and prior to the completion of the probationary period.

The performance evaluations will be conducted in June-July of each year to allow for proper budgeting of proposed pay increases. The supervisor of each department is responsible for conducting the review of the employee(s) that report to them.

The employee may be provided with a self-evaluation review prior to the supervisor's review of performance.

The employee will have the opportunity to discuss his or her performance with the supervisor at the time of the review. The supervisor may recommend, and city council may then consider whether a merit increase will be given to the employee. It is at the sole discretion of the council to award employee increases; budgetary considerations will be reviewed.

Upon completion of the review, the employee and supervisor, the Mayor on behalf of the city council, may sign the review. The original will be placed in the employee's personnel file and copy given to the employee.