

CHAPTER 5

POSITION DESCRIPTIONS AND PERFORMANCE APPRAISALS

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Introduction

Communicating the duties and responsibilities of a position to the person occupying the position is an essential element in getting any job done. Setting standards for the performance of these duties and evaluating the actual performance are inseparable from developing job duties. This chapter discusses writing position descriptions, the development of objective performance requirements, and evaluation of employee performance. It contains a format for including all of the above tasks into one, simple operation.

Written Position Descriptions

Communicating the duties, responsibilities, and performance standards of a position to the person who occupies the position can be best done by a *written* job description. Verbal instructions cannot provide the mutual understanding that is provided by a written description of the duties and performance requirements.

Uses of Position Descriptions

Written position descriptions assist in personnel management in a variety of ways, including:

1. Determining knowledge, skills and abilities necessary to perform the job
2. Establishing equitable and consistent salaries
3. Recruiting
4. Setting performance standards
5. Increasing communication between supervisors and employees
6. Making staffing decisions
7. Increasing productivity
8. Determining essential functions of positions
9. Evaluating reasonable accommodations, if necessary

Statement of Adequacy

The format of position descriptions varies widely among local, state and federal jurisdictions. There is no universal format, but a position description is adequate if it clearly states the principal duties, responsibilities, and supervisory relationships of a position. This does not preclude the necessity to identify required skills, knowledge, and abilities necessary for establishing qualification standards as discussed in a previous chapter, and the minimum qualifications may also be included in a position description. A suggested format for writing position descriptions is included as Exhibit 5.2 in this chapter.

Writing Better Position Descriptions

The following should prove helpful in writing brief, accurate descriptions. It is not intended to cover all aspects of writing position descriptions, but it should aid the writer in reducing the amount of time and paper involved.

There are five major don'ts in developing position descriptions:

Don't describe the person occupying the position. In preparing a position description, describe the position or the responsibilities to be performed.

Don't describe procedures. It is not necessary to detail the step-by-step procedures in performing the duties of a position.

Don't describe minor details. Too much detail makes a responsible job appear to be loaded with low-level duties. All positions have major tasks and minor tasks. All engineers do some detailing, all supervisors do some work of employees they supervise, and in some places everyone makes coffee. Including all these duties could make minor duties in a position description appear to be major. A principal or major duty is defined as a duty, the successful accomplishment of which contributes significantly to the achievement of the job and district goals.

Don't use technical terminology. Do use lay terms. For example, an attorney would not "prepare tort actions under the doctrine of *Res Ipsa Loquitur*." He would merely "prepare civil law suits."

Don't write and write and write. If the first four are observed, the fifth *don't* should not be a problem. The position descriptions will automatically be the desired length if only the major duties of the position are described.

Getting Started

If more than one position description needs to be developed for a district, start with the lowest level position and work toward the highest level. Starting with the lowest level will ensure duties are assigned to the position in which they can be performed at the least cost.

Writing the *first word* is often the most difficult part of describing the duties of a position. For a clue as to how to begin, one can usually look at the position's title or main mission. All mission verbs are action verbs, and it is best to begin each duty with an action verb. This cuts excess words and gives the reader an immediate and accurate understanding of what is being done and at what general level of responsibility. See Exhibit 5.3 of this chapter for a list of "action" verbs.

As an example of what is meant by cutting excess words, one could describe a duty by saying: "It is the responsibility of the incumbent in this position to see that all engineering drawings are filed."

Naturally, since this description covers this position only, we know that duties of this position are all responsibilities of the position. We can skip those comments. We can also delete the reference to the incumbent, since we are writing about the position and not the person. It's much easier, as well as more understandable, to simply say: "Files engineering drawings" or "Maintains files of engineering drawings."

It may be creative to write regarding a duty: "This office is very unique in that it requires the incumbent herein to maintain its very responsible records according to standards prescribed by the Happy County Conservation District."

Creative narrative is not the goal. Stick to duties. The writer could have said: "Maintain records according to district requirements." This does not mean positions should be "played down" by over-summarizing or using small words. Just be concise and precise.

Keeping Position Descriptions Current

Position descriptions should be kept up-to-date to ensure high productivity and to maintain communications between employees and supervisors. Position descriptions should be dynamic and reflect changes in duties and responsibilities. A joint review by the employee and the immediate supervisor should be made annually, or more often if necessary, to discuss changes in duties and responsibilities. An appropriate time for this review is in conjunction with the performance appraisal, which is discussed later in this chapter.

Example Position Descriptions

Included at the end of this chapter, as Exhibits 5.4 to 5.7, are example position descriptions for District Clerk, District Secretary, District Manager, and Water Quality Coordinator. **The sample position descriptions and lists of duties should be used *only* as guides.** Each employee should have a position description and corresponding performance requirements that are developed *expressly* for the position. A checklist for developing a position description is included as Exhibit 5.1.

Performance Appraisals

All employees want and have a right to know what is expected of them in their jobs and how well they are performing. A performance appraisal or evaluation based on objective criteria should help achieve peak performance from employees. Evaluating the performance of subordinates can be very rewarding and enjoyable but also very challenging. It is perhaps the most important job a supervisor has to do. Good performance appraisals have benefits for everyone, the employee, the immediate supervisor, the district board and the conservation district.

Benefits

The following benefits may be realized from a formal performance appraisal system.

1. Individual performance improvement.
2. Supervisor-employee relationships improvement.
3. Employee accomplishments and good work recognition.
4. Personnel actions, such as pay increases, promotions, removals, and rehires, will be based on sound, objective criteria and will be documented.
5. Employees and supervisors' awareness of job requirements and needed changes in job duties.

6. Employees awareness of their supervisor's judgment of their performance.

7. Training needs identification.

Performance Standards

The standards by which an employee must perform each duty should be communicated to the employee in terms of quantity and quality. Any evaluation of performance should in turn be based on these objectives and job related criteria. Objectivity is the basic and most essential element in setting these standards. It is important to evaluate the employee's performance, not the employee as a person.

The Importance of Objectivity

In the past, many performance evaluation systems contained such items to be appraised as initiative, leadership, loyalty, and dependability. Although we all want loyal and dependable people who are leaders and show initiative, there is an inherent difficulty in including these characteristics in an evaluation system; it is difficult to be objective.

This is not to say that leadership, loyalty, initiative, and other personal traits are not important and should not be considered. However, subjective measurements that tell what a person is or knows should not take the place of objective measurements that tell what a person *does*.

Over emphasizing objectives or measurable elements can also lead to problems. If an effort is made to quantify all elements of performance, there is a danger of developing a cookbook approach to evaluation so that it ends up being little more than a checklist. Human elements are important in performing a job well, but these are not always measurable. Nevertheless, performance rather than personality should be evaluated. Subjective elements, when evaluated, should be based on objective observations. If initiative is an important evaluation factor, examples should be given of required areas where initiative is expected. The evaluation of this factor should then be based on how well the employee performs these specific requirements.

Setting Objective Performance Standards

Each duty developed for a position should have a corresponding standard by which it is performed. This standard should be stated in terms of quantity and quality. Example:

Duty. Types correspondence, conservation plans, district newsletters, newspaper articles, various reports and other material necessary for the operation of the office.

Performance Standard. There should be no typographical errors. All final copies should be grammatically correct. All typing is to be completed by the specified deadline.

The following should be considered in setting performance standards.

1. Standards should be mutually agreed upon by supervisor and employee. It is absolutely essential that employees know and understand the performance standards against which they will be measured.
2. Standards should be realistic and achievable.

3. Standards should be set slightly above the average. They should be achievable but set to challenge the employee a little.
4. Standards should be flexible. It should be possible to amend the standard if unforeseen circumstances arise that make the standard unachievable.

Formal Performance Review

Most supervisors are aware of the quality of an employee's performance, but this awareness is not enough. There should be a time when immediate supervisor and employee get together for the specific purpose of reviewing performance. This periodic, formal review is essential in maintaining a high standard of employee performance.

Although evaluation of an employee's performance is a continuing process, a formal discussion with the employee should take place at least once a year. The evaluation should be a culmination of numerous informal observations, checks and discussions made throughout the year. The formal discussion with the employee should take place just prior to, and be the basis for, decisions made regarding merit salary increases.

A formal review of an employee's performance should also take place at the end of any training period of employment. Exhibit 5.9 contains two performance appraisal samples to illustrate different formats and wording that may be used.

Who Should Perform the Appraisal

An employee's performance should be evaluated by the person who is most familiar with the employee's work and who was involved in setting the performance standards. In most cases, this is the employee's immediate supervisor which may be a board member. Districts may include all board members in the appraisal process. In a situation where a district technician is under the technical supervision of a NRCS employee for maintaining standard specifications of the NRCS field office, the NRCS employee should contribute to the evaluation. Where district clerical staff performs duties for both the district and NRCS, the DC should provide input for the performance appraisal.

Steps in the Formal Appraisal

Prepare for the discussion - Effective evaluations don't just happen - they are planned. Gather facts, review the position description and performance standards, and decide what you want to accomplish.

Pick a good time and place - Arrange to hold the discussion where it will not be interrupted. Allow ample time for the discussion. Pick a time when both you and the employee can be relaxed. Notify the employee of the time, place, and reason for the discussion ahead of time.

Open the discussion in a friendly and permissive manner - Tailor the approach to each individual. Let the discussion develop naturally.

Explain the purpose of the talk - Once the meeting has been opened on a positive, friendly note, state clearly the purpose of the talk.

Ask the employee to review their responsibilities - It is not unusual that clarity is lacking concerning some aspects of the job. Ask the employee to give a general review of their major assignments. Ask which assignment they consider the most important, which efforts have produced successes, and where problems were experienced. Encourage the employee to talk and don't interrupt unnecessarily.

Discuss each job duty - Review the performance of each job duty with the employee and let them know how well they performed each duty.

Jointly develop next year's performance standards - This gets the employee involved and promotes mutual understanding. Make any needed adjustments in duties and responsibilities.

Jointly develop plans for improvement - Discuss with the employee ways in which performance can be improved. Discuss areas where additional training is needed.

Guidelines for Evaluating Employee Job Performance

A supervisor may find the following suggestions helpful in evaluating an employee's performance.

Don't rely on gimmicks. Even the best performance appraisal form won't relieve the supervisor of the responsibility of making decisions about an employee's competence. The best way to judge competence is to work with the employee day by day, to make observations during moments of routine, and stress in a variety of assignments.

Admonish when necessary. Tell an employee when they have done well and when they have not. They won't resent correction handled in a natural manner. However, it is hard for both supervisor and the employee if this is lumped all together in a single, grueling session held once or twice a year.

Be self-critical. Before an employee is admonished for inadequate work, ask yourself frankly, "Has leadership contributed to this deficiency in any way?" "Was too much expected?" "Did the employee understand the duty?" "Did the employee have proper training to do the job?" "Is the criticism absolutely fair, or is it influenced by bias?" Objectivity enables discussion of the issues to be constructive.

Make sure the employee has the same understanding of the job as the supervisor. An employee's job performance cannot be judged fairly if they have not fully understood the duties of the position. Let the employee do some of the talking. It may be found that the employee was not aware of responsibility for certain job duties for which the supervisor is claiming a performance deficiency.

Get down to cases. Vague generalities don't work. Be specific. Explain in precise language where the employee's performance is deficient is, and what can be done to correct mistakes. Make sure the employee understands precisely what standards he/she is expected to meet.

Criticize the work, not the person. Avoid being personal when discussing an employee's job performance. There are certain exceptions to this advice, e.g. if the attitude of the employee is affecting their job competence.

Don't laugh it off. Some supervisors try to hide criticism behind humor. This is a mistake. If confrontation is necessary to improve performance and competence, then the seriousness must be conveyed as well. An employee's competence at the job is essential to both the employee and the supervisor. Supervisors who confront with constructive criticism will often earn the respect of their employees.

Comment on improvements. If an employee corrects a shortcoming that has been criticized, comment on the improvement. This will encourage the employee to continue in excellence and improve the response to future corrections.

Don't be a debater. The supervisor is the final judge of an employee's job performance. This doesn't mean to cut off all discussion. Let the employee state a point of view, and if correct, say so. Don't permit the discussion to turn into an argument.

Don't Compare. Comparisons are odious. This is especially true in discussing job performance. An employee may be willing to accept criticism of deficiencies, but they may be resentful if another individual is pointed out as an example to be followed.

Emphasize strong points. The skillful leader plays up the strength of subordinates. It's better for a worker to develop special talents and skills than to spend the entire time trying to correct weaknesses. Point out an employee's deficiencies and help try to minimize them, but keep things in balance. If concentration is entirely on the negative, little will be accomplished in developing the positive. Positive reinforcement is more effective than negative in soliciting the desired response or behavior. A checklist for performance appraisal is included in this chapter as Exhibit 5.8.

The Value of an Appraisal Form

Because employee performance evaluations are important, use of an appraisal form is advisable to make the task as systematic as possible. Many supervisors are reluctant to conduct an overall review of performance, unless the completion of a form makes it necessary to do so. Any performance appraisal form should be correlated with the position description.

Analyzing Poor Performance

Many supervisors have had to face the problem of an employee performing at an unacceptable level. Such a situation is the true test of a good supervisor because the way in which the problem is handled may very well affect the life of the employee. The causes of poor performance are too numerous to detail, but they can be grouped into three categories: the employee, the supervisor or the situation. Determining the exact cause of poor performance and taking appropriate action is very important in maintaining the efficiency of district operations.

The following is a very general discussion of the causes of poor performance.

The employee. Outside forces, such as financial pressures, family or health problems can be contributed to poor performance. The cause should be determined and professional help sought if necessary. Perhaps the employee is careless or negligent. Perhaps the job itself is beyond the current capabilities of the employee. In such a case, additional training may be the answer.

The supervisor. Has the supervisor upheld their responsibility to the employee? Did the supervisor adequately determine training needs? Has the supervisor maintained a periodic check of the employee's performance and suggested improvements? Have the requirements of the position been adequately explained to the employee?

The situation. Do conditions exist on the job that preclude acceptable performance or are beyond the control of the employee? Were standards set too high? Does the job hold a challenge for the employee?

Regardless of the cause for poor performance, the reason should be determined and appropriate action taken. Various chapters of this handbook deal with actions that can be taken to correct poor performance. These range from determining training needs and providing necessary training to disciplinary actions, including terminations. Any action taken should be based on an objective analysis of the causes.

Exhibit 5.1 Checklist for Developing a Position Description

ITEM	COMPLETED
1. Assign responsibility for writing the position description to the district manager or personnel committee.	_____
2. State title and purpose of the position.	_____
3. State duties of position by listing each major duty and its performance requirements.	_____
4. State who will provide supervision for the position. Remember to use position titles and not specific names.	_____
5. State minimum qualification standards.	_____
6. Provide copies to the district board for approval.	_____
7. Provide a copy to the Division of Conservation or grant funding source for review and comment, if applicable.	_____

Exhibit 5.2 Position Description Format

<u>TITLE:</u>	The title should be based on the function of the position, i.e., an employee who is assigned all the manager responsibilities of the district and some secretarial and/or technical responsibilities should be called the district manager.
<u>INTRODUCTION</u>	The introduction section should reflect broad general functional areas of the position for the district, i.e., management, secretarial, technician.
<u>PRINCIPAL DUTIES</u>	This section should lay out, in broad terms, the duties and responsibilities of the position. The tasks should be unique to this position and should not reflect detailed action.
<u>SUPERVISION</u>	This statement describes who supervises the employee. Also included are supervisory responsibilities of this position, if any.
<u>MINIMUM QUALIFICATIONS</u>	This section lists the minimum qualification standards, education, experience and skills required for the position.

Exhibit 5.3 Action Verbs

administers	manages
answers	operates
approves	organizes
assures	oversees
attends	plans
calculates	posts
checks	prepares
computes	provides
coordinates	selects
directs	serves
ensures	studies
files	supervises
instructs	totals
leads	transmits
maintains	types

Exhibit 5.4 Example Position Description – District Clerk

Happy County Conservation District District Clerk Position Description

INTRODUCTION

The district clerk performs typing, filing and general office tasks for the Happy County Conservation District. In addition to working for the district, this position shall, within the range of duties and hours of work set by the board of supervisors, be directed to provide support services for the Natural Resources Conservation Service (NRCS).

All duties performed and actions taken by the district clerk while on official duty will be performed in a safe and healthful manner and will be of a nature to reflect favorably on the Happy County Conservation District.

PRINCIPAL DUTIES

1. Types correspondence and various reports.
2. Assists in maintaining files and records according to district and NRCS established systems.
3. Inputs computer data.
4. Provides backup in answering telephone and greeting visitors.
5. Performs other related duties.

SUPERVISION

The district clerk is under the direct supervision of the district manager. The NRCS district conservationist (DC) will provide supervision and direction where NRCS has overall program responsibilities, or in the management of NRCS office space or NRCS owned equipment. The district clerk does not supervise other employees.

MINIMUM QUALIFICATIONS

1. General typing skills.
2. Working knowledge of spelling, punctuation, grammar, mathematics and elementary office procedures.
3. General knowledge of filing procedures.

Exhibit 5.5 Example Position Description – District Secretary (assuming no District Manager)

Happy County Conservation District District Secretary Position Description

INTRODUCTION

The district secretary performs various clerical, secretarial and administrative duties for the Happy County Conservation District. This position administers and carries out policies and operates within the guidelines set forth by the board of supervisors. In addition to working for the district, the district secretary shall, within the range of duties and hours of work set by the board of supervisors, be directed to provide support services for the Natural Resources Conservation Service (NRCS). Work requires attendance at evening district board meetings and other meetings in which the district has an interest. Occasional overnight travel will be required to attend various meetings, seminars and workshops.

PRINCIPAL DUTIES

1. Serves as office receptionist by receiving visitors and telephone calls.
2. Maintains district and NRCS files, handbooks, manuals and guides according to established systems.
3. Types and assembles correspondence, reports and other materials as needed.
4. Utilizes the computer to effectively collect, manage and disseminate information.
5. Processes incoming and outgoing mail.
6. Coordinates and explains district programs.
7. Coordinates district business activities such as grass seed and tree sales, etc.
8. Maintains financial records and ledgers.
9. Assembles materials for board meetings. Records, prepares and distributes minutes.
10. Maintains time and attendance records for district employees. Completes payroll records and withholding reports.
11. Assists in preparation of annual work plan, annual report and annual budgets.
12. Assists with the district information and education program.
13. Assists with annual meeting preparations.
14. Performs other related duties.

SUPERVISION

Policy and program direction is received from the district board. The district secretary is under the direct supervision of the district board chairperson. The amount of supervision will depend on experience and ability to work independently.

The NRCS District Conservationist (DC) will provide supervision and direction where NRCS has overall program responsibilities, or in the management of NRCS office space or NRCS-owned equipment. The DC will also provide supervisory technical support on all activities relative to those found in the Field Office Technical Guide.

The district secretary does not supervise other employees.

MINIMUM QUALIFICATIONS

1. High school diploma or GED certificate.
2. Types at a rate of 40 words per minute.
3. Working knowledge of spelling, punctuation, grammar, mathematics and general office procedures.
4. Working knowledge of basic bookkeeping methods.
5. Working knowledge of modern office equipment.

If the requirements can not be met, other experience and training indicating an applicant has the capacity and willingness to meet the qualifications can be substituted.

Exhibit 5.6 Example Position Description – District Manager (assuming no District Secretary)

Happy County Conservation District District Manager Position Description

INTRODUCTION

The district manager performs various administrative, secretarial and clerical duties for the Happy County Conservation District. This position administers and carries out policies and operates within the guidelines set forth by the board of supervisors. The district manager provides day-to-day coordination of district activities and serves as the district's representative to other agencies, organizations and the general public. In addition to working for the district, the district manager shall, within the range of duties and hours of work set by the board of supervisors, be directed to provide support services for the Natural Resources Conservation Service (NRCS). Work requires attendance at evening district board meetings and other meetings in which the district has an interest. Occasional overnight travel will be required to attend various meetings, seminars and workshops.

All duties and actions taken by this position while on official duty will be performed in a safe and healthful manner and will be of a nature to reflect favorably on the Happy County Conservation District.

PRINCIPAL DUTIES

1. Serves as office receptionist by receiving visitors and telephone calls.
2. Maintains district and NRCS files, handbooks, manuals and guides according to established systems.
3. Types correspondence, reports and other materials as needed.
4. Utilizes computer to effectively collect, manage and disseminate information.
5. Processes incoming and outgoing mail.
6. Orders office supplies, materials and services.
7. Coordinates and explains district programs.
8. Oversees district business such as equipment rental, grass seed and tree sales, etc.
9. Maintains financial records and ledgers.
10. Supervises and directs the work of district personnel. Provides orientation and training for new employees. Develops a yearly staffing needs inventory.
11. Assembles materials for board meetings. Records, prepares and distributes minutes.
12. Maintains time and attendance reports for district employees. Completes payroll records and withholding reports.
13. Prepares a draft of the annual work plan, annual report and annual budgets for district board review.
14. Develops and implements district information and education program.
15. Coordinates annual meeting preparations.
16. Performs other related duties.

SUPERVISION

Policy and program direction is received from the district board. The district manager is under the direct supervision of the district board chairperson. This position independently carries out day-to-day work.

The NRCS District Conservationist (DC) will provide supervision and direction where NRCS has overall program responsibilities, or in the management of NRCS office space or NRCS-owned equipment. The DC will also provide supervisory technical support on all activities relative to those found in the Field Office Technical Guide.

The district manager supervises and directs the work of the district clerk and the water quality coordinator.

**Exhibit 5.6 Example Position Description – District Manager (continued)
(assuming no District Secretary)**

**MINIMUM
QUALIFICATIONS**

1. High school diploma or GED certificate.
2. Two years of experience in clerical, secretarial and/or administrative work.
3. General knowledge of conservation practices.
4. Types at a rate of 40 words per minute.
5. Working knowledge of modern office equipment.
6. Working knowledge of computer software i.e., word processing.
7. Working knowledge of spelling, punctuation, grammar, mathematics and general office procedures.
8. Working knowledge of basic accounting and bookkeeping methods.
9. Ability to communicate effectively, both verbally and in writing.
10. Ability to organize and plan work.
11. Ability to effectively supervise subordinates.
12. Ability to work without day-to-day supervision.

If the requirements can not be met, other experience and training indicating an applicant has the capacity and willingness to meet the qualifications can be substituted.

Exhibit 5.7 Example Position Description – Water Quality Coordinator

Happy County Conservation District Water Quality Coordinator Position Description

INTRODUCTION

The water quality coordinator provides administrative, clerical and technical assistance for the Happy County Conservation District Non-Point Source (NPS) Pollution Program and other water quality programs. The water quality coordinator administers and carries out policies and operates within the guidelines set forth by the board of supervisors and the Division of Conservation (DOC). In addition to office work, the water quality coordinator's position requires outside work that may include steep or rough terrain. Work requires attendance at evening district board meetings and other meetings in which the district has an interest. Occasional overnight travel will be required to attend various meetings, seminars and workshops. The water quality coordinator must provide their own transportation and will be reimbursed for work-related mileage according to district policy. This position is classified as temporary full-time.

PRINCIPAL DUTIES

1. Coordinates and explains the district's NPS Pollution Program.
2. Maintains filing system and NPS Pollution Control fund records according to district and DOC guidelines.
3. Maintains a cooperative relationship and coordinates activities with entities involved with the NPS Pollution Program and water quality.
4. Develops and implements the water quality information and education program.
5. Encourages and assists landowners in applying pollution control practices including personal contacts.
6. Oversees project construction and assists with check out.
7. Types and assembles correspondence, reports, NPS cost-share forms and other materials as needed.
8. Maintains abandoned water well inventory, assessment and plugging records according to established system.
9. Collects soil and water samples.
10. Develops and implements additional NPS Project Work Plans.
11. Assists with implementing the district's Riparian and Wetland Protection Program.
12. Prepares a monthly activities report and presents summary at board meetings.
13. Performs other related duties.

SUPERVISION

This position is under the direct supervision of the district manager. The NRCS district conservationist (DC) will provide supervisory technical support on all activities relative to those found in the Field Office Technical Guide and will also provide supervision in the management of NRCS office space and NRCS-owned equipment.

The water quality coordinator does not supervise other employees.

MINIMUM QUALIFICATIONS

1. High school diploma or GED certificate.
2. Background in conservation or agriculture.
3. Working knowledge of modern office equipment.
4. Ability to communicate effectively, both verbally and in writing.
5. Ability to organize and plan work.
6. Ability to work well with people.
7. A valid Kansas state driver's license.

If the requirements cannot be met, other experience and training indicating an applicant has the capacity and willingness to meet the qualifications can be substituted.

Exhibit 5.8 Checklist for Performance Appraisals

ITEM	COMPLETED
1. Develop objective performance standards in quantitative and qualitative terms.	_____
2. Each duty in the position description should have a corresponding performance standard.	_____
3. Standards should be reviewed and agreed to by both the employee and the employer.	_____
4. Establish when the performance reviews are to take place.	_____
5. Performing the appraisal:	
a. Prepare for discussion-review of position description, performance standards, and gather facts.	
b. Arrange a time and place for the appraisal.	
c. Open discussion in a friendly, comfortable atmosphere.	
d. Clearly state the purpose of the meeting.	
e. Ask the employee to discuss their responsibilities.	
f. Discuss each job duty in detail, giving necessary praise and admonition.	
g. Develop jointly, the next performance standards.	
h. Develop jointly, plans for improvement.	
i. Document the results of the appraisal, review by district board, and place a copy in the employee's file.	_____

Exhibit 5.9 Performance Appraisal – Sample A

Happy County Conservation District

Employee's Name Ima Good Employee's Title District Manager

Period Covered 12/01/2015 to 11/30/2016

Performance appraisals are an ongoing process. A formal employee review occurs at the end of each appraisal period. The employee and immediate supervisor discuss how well the employee has met the original goals and standards, plan for improvement and develop next year's performance standards. Furthermore, the appraisal will serve as the basis for any merit pay increases granted by the district board. Objective performance appraisals provide benefits for everyone - the employee, the board of supervisors and the conservation district.

An employee's performance will be rated by comparing actual job performance against established performance standards. Rate the employee's performance with the description which best represents how the employee completes assigned work.

Excellent: Constantly achieves more than expected. Frequently demonstrates outstanding performance.

Satisfactory: Normally achieves all results expected. Occasionally exceeds position requirements.

Needs Improvement: Not performing at minimum acceptable level standard.

Unsatisfactory: Performance consistently below expectations.

PART 1 DUTIES PERFORMED

Performance Duties and Standards	RATING
RECEPTIONIST - DISTRICT & NRCS	
1. Promptly greets the public in a friendly and helpful manner.	_____
2. Answers and directs telephone calls in a courteous and helpful manner.	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Performance Duties and Standards	RATING
<u>CLERICAL - DISTRICT</u>	
1. Maintains files, handbooks, manuals, etc., according specified guidelines and instructions in a timely manner.	_____
2. Accurately maintains time and attendance reports and completes timely payroll records and withholding reports for all district employees.	_____
3. Types, assembles and copies correspondence, reports and other materials. Types from rough draft, verbal instructions or personal composition. Final copy is typographically error-free, grammatically correct, accurate and completed by specified deadline.	_____
4. Receives and distributes incoming mail and assembles and dispatches outgoing mail in a timely manner	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Performance Duties and Standards	RATING
<u>CLERICAL - NRCS</u>	
1. Maintains files, handbooks, manuals and guides according to established systems and completed within five days of receipt.	_____
2. Maintains library according to established system.	_____
3. Types, assembles and copies correspondence, forms and other materials. Types from rough draft, verbal instructions or personal composition. Final copy is typographically error-free, grammatically correct, accurate and completed by specified deadline.	_____
4. Receives and distributes incoming mail and assembles and dispatches outgoing mail in a timely manner.	_____
5. Assists with assembling conservation plan maps and folders within five days of receipt or by specified deadline.	_____
6. Assists with tract reconstitutions. Paperwork and computer data entry completed in a timely manner.	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Performance Duties and Standards	RATING
<u>PROCUREMENT - DISTRICT & NRCS</u>	
1. Adequately maintains district office supplies. Obtains supplies and materials according to board policy.	_____
2. Promptly arranges for repairs or replacement of district equipment as directed by board.	_____
3. Assists with determining NRCS office supplies and places orders as directed by district conservationist.	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Performance Duties and Standards	RATING
<u>DISTRICT OPERATIONS</u>	
1. Coordinates district activities with appropriate agencies, organizations and others. Maintains cooperative working relationships and provides helpful, courteous service. Works with minimal direct daily supervision. Services and actions performed in accordance with the Equal Employment Opportunity provisions and the Civil Rights Act.	_____
2. Stays informed and provides board with information of programs, legislative bills and laws affecting natural resource conservation.	_____
3. Complies with Memorandums of Understanding and the Gratuitous Use Agreement.	_____
4. Administers county and state programs in accordance with proper procedures. Well versed on district programs and effectively explains.	_____
5. Maintains accurate financial records on a regular basis. Prepares checks for signatures and treasurer's report for monthly board meetings.	_____
6. Sends supervisors board meeting notice, agenda, last meeting's minutes, treasurer's report and correspondence at least three days before a board meeting.	_____
7. Records, prepares and distributes monthly and special board meeting minutes. Copies of minutes sent to Division of Conservation and NRCS Area Office within 10 days after board meeting.	_____
8. Oversees district business such as grass seed sales, tree sales and grass drill rental, etc. Regularly maintains business transaction records in a neat and orderly fashion. Orders promptly placed with suppliers. Statements sent to customers at the end of every month.	_____
9. Effectively and fairly supervises and directs work of the district clerk and water quality coordinator. Develops a yearly staffing needs inventory.	_____
10. Coordinates the annual meeting preparations. Meeting/meal arrangements well organized.	_____
11. Prepares a draft of the Annual Work Plan, Annual Report and district budgets for board review. Final copy is typographically error-free, grammatically correct and submitted by specified deadline.	_____
12. Attends appropriate meetings and workshops as approved or directed by board.	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Performance Duties and Standards	RATING
<u>INFORMATION AND EDUCATION PROGRAM</u>	
1. Promotes Soil and Water Stewardship Week and distributes materials in March. Makes arrangements for county commissioners to sign proclamation. Prepares article for newspaper and provides public service announcements to local radio stations.	_____
2. Promotes and organizes poster, limerick, essay and speech contests. Provides schools with information in ample time for contest preparation and participation.	_____
3. Promotes participation in the Kansas Range Youth Camp. Submits recruitment newspaper article and contacts local high schools and county extension office for possible candidates.	_____
4. Promotes Ag in the Classroom. Provides teachers with information and submits recruitment newspaper article.	_____
5. Assists county extension agent and DC with Bankers Awards Program.	_____
6. Organizes at least one teacher workshop per year such as Project WILD or Project Learning Tree.	_____
7. Develops and organizes county fair booth.	_____
8. Writes at least three news releases per year to promote district activities.	_____
9. Prepares and distributes the district's quarterly newsletter.	_____
10. Makes presentation to at least two schools per year.	_____
11. Organizes the fall conservation tour.	_____
12. Develops and implements other I&E activities as directed or needed.	_____
Additional Comments:	

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Happy County Conservation District

Employee's Name Ima Good Employee's Title District Manager

Period Covered 12/01/2015 to 11/30/2016

PART 2

GENERAL APPRAISAL OF EMPLOYEE PERFORMANCE		
COMPLETE ITEMS BELOW FOR ALL EMPLOYEES (highlight items needing improvement)		RATING E - excellent S - satisfactory I - needs improvement U - Unsatisfactory
Job Knowledge:	Knowledge of duties and position responsibilities	
Office Equipment Knowledge:	Proficient use of the computer and applicable programs, scanner, calculator and photocopier	
Productivity:	Amount of work generated and completed successfully as compared to amount of work expected of position	
Overall Quality:	Correctness, completeness and accuracy	
Initiative:	Self-motivation, amount of direction required, seeks improved methods, consistent in trying to do better, and responds to need for extra effort	
Use of Time:	Uses available time wisely, accomplishes required work on or ahead of schedule, completely finishes all projects timely	
Planning:	Plans and organizes own work, anticipates and prepares for future requirements, establishes logical priorities, maintains control of workloads	
Attendance:	Available for work as scheduled, attends appropriate meetings/workshops and no unauthorized absences	
Human Relations:	Establishes & maintains cordial work climate, promotes harmony and enthusiasm, displays sincere interest in assisting other employees and the public	
Adaptability:	Adapts quickly to new or different situations, flexible, willingness to accept change	
Oral Communications:	Speaks well, communicates thoughts clearly, uses proper grammar	
Written Communications:	Writes clearly and concisely, well organized train of thought, creative, neat, uses proper grammar, sentence structure, punctuation, etc.	
Additional Comments:		

Exhibit 5.9 Performance Appraisal – Sample A (continued)

Happy County Conservation District

Employee's Name Ima Good Employee's Title District Manager

Period Covered 12/01/2015 to 11/30/2016

PART 3

OVERALL PERFORMANCE

(select one)

Excellent: Constantly achieves more than expected. Frequently demonstrates outstanding performance.

Satisfactory: Normally achieves all results expected. Occasionally exceeds position requirements.

Needs Improvement: Not performing at minimum acceptable level.

Unsatisfactory: Performance consistently below expectations.

Additional Comments:

CERTIFICATION OF PERFORMANCE APPRAISAL REVIEW

This performance appraisal has been completed by the employee's immediate supervisor in consultation with the Natural Resources Conservation Service district conservationist. It has been reviewed by the district board and they agree with the ratings as attested by the chair's signature.

Supervisor's signature _____ Date of evaluation _____

District Chair's signature _____ Date _____

This performance appraisal has been discussed with the employee as attested by the employee's signature. If the employee questions these ratings, concerns may be discussed with the immediate supervisor. If an agreement can not be reached, the employee may request in writing, further review by the district board. The employee's signature does not necessarily constitute agreement with the ratings or comments.

Employee's signature _____ Date _____

Exhibit 5.9 Performance Appraisal – Sample B

Employee's Name _____ Conservation District _____

Employee's Title _____ Period Covered _____ to _____

Excellent: Constantly achieves more than expected. Frequently demonstrates outstanding performance.

Satisfactory: Normally achieves all results expected. Occasionally exceeds position requirements.

Needs Improvement: Not performing at minimum acceptable level.

Unsatisfactory: Performance consistently below expectations

PART 1

PERFORMANCE DUTIES AND STANDARDS	PERFORMANCE RATING	
<p>PERFORMANCE DUTIES - Main jobs or tasks to be accomplished</p> <p>STANDARDS - Conditions that will exist or those specific work items that will be accomplished when the employee is performing the job or task satisfactorily.</p>	<p>APPRAISAL NOTES</p>	<p>E - excellent S - satisfactory I - needs improvement U – Unsatisfactory (enter 1)</p>
<p>DUTY: (example) Type correspondence, newsletters & reports</p>	Is quick, efficient and timely	
<p>STANDARD: No typographical errors, grammatically correct</p>	Rarely has typos, grammar always correct	
<p>-----</p>		
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Exhibit 5.9 Performance Appraisal - Sample B (continued)

Employee's Name _____ Conservation District _____

Employee's Title _____ Period Covered _____ to _____

PART 2

GENERAL APPRAISAL OF EMPLOYEE PERFORMANCE		
COMPLETE ITEMS BELOW FOR ALL EMPLOYEES (highlight items needing improvement)		E - excellent S - satisfactory I - needs improvement U - Unsatisfactory (enter 1)
Job Knowledge:	Knowledge of duties and position responsibilities	
Office Equipment Knowledge:	Proficient use of the computer and applicable programs, typewriter, calculator and photocopier	
Productivity:	Amount of work generated and completed successfully as compared to amount of work expected of position	
Overall Quality:	Correctness, completeness and accuracy	
Initiative:	Self-motivation, amount of direction required, seeks improved methods, consistent in trying to do better, and responds to need for extra effort	
Use of Time:	Uses available time wisely, accomplishes required work on or ahead of schedule, finishes all projects begun and leaves no loose ends	
Planning:	Plans and organizes own work, anticipates and prepares for future requirements, establishes logical priorities, maintains control of workloads	
Attendance:	Available for work as scheduled, attends appropriate meetings/workshops and no unauthorized absences	
Human Relations:	Establishes & maintains cordial work climate, promotes harmony and enthusiasm, displays sincere interest in assisting other employees and the public	
Adaptability:	Adapts quickly to new or different situations, flexible, willingness to accept change	
Oral Communications:	Speaks well, communicates thoughts clearly, uses proper grammar	
Written Communications:	Writes clearly and concisely, well organized train of thought, creative, neat, uses proper grammar, sentence structure, punctuation, etc.	
Additional Comments:		

Exhibit 5.9 Performance Appraisal - Sample B (continued)

Employee's Name _____ Conservation District _____

Employee's Title _____ Period Covered _____ to _____

PART 3

OVERALL PERFORMANCE EVALUATION

(select one)

_____ **Excellent:** Constantly achieves more than expected. Frequently demonstrates outstanding performance.

_____ **Satisfactory:** Normally achieves all results expected. Occasionally exceeds position requirements.

_____ **Needs Improvement:** Not performing at minimum acceptable level.

_____ **Unsatisfactory:** Performance consistently below expectations

Additional Comments:

Supervisor's signature _____

Supervisor's title _____

Employee's signature _____

Date of evaluation _____