

Village of Palmyra

Village Clerk/Treasurer – Employee Evaluation Form

Employee Name: _____

Evaluation Period: _____

Evaluator Name/Title: _____

Date of Evaluation: _____

Instructions:

For each category, rate performance using the following scale:

5 – Excellent

4 – Above Expectations

3 - Meets Expectations

2 – Needs Improvement

1 – Unsatisfactory

N/A – Not applicable or Observed

Provide comments for any ratings of 3 or below and use the comment boxes for examples, strengths, and areas for improvement.

Section 1: Administrative Performance (Rate 1–5)

Criteria	Rating (1–5)
1.Maintains accurate and organized official records (minutes, ordinances, resolutions, etc.)	
2.Prepare and distributes agendas and meeting materials in a timely manner	
3.Provides effective support to the Village Board and committees	
4.Manages elections and public notices in compliance with legal requirements	

COMMENTS AND REASONINGS BEHIND RATINGS

Criteria

Rating (1–5)

Section 2: Financial Management & Reporting

Rating (1–5)

Criteria

- 1.Pre pares and manages the village’s annual budget accurately**
- 2.Handles accounts payable/receivable, payroll, and bank reconciliations effectively**
- 3.Provides timely, accurate financial reports to the Board and state agencies**
- 4.Ensures compliance with local, state, and federal financial regulations**

COMMENTS AND REASONINGS BEHIND RATINGS

Section 3: Customer Service & Public Interaction

Criteria

Rating (1–5)

- 1.Responds to public inquiries and concerns professionally and promptly**
- 2.Demonstrates courtesy, patience, and confidentiality when dealing with residents**
- 3.Provides assistance with licenses, permits, tax payments, and other village services**
- 4.Maintains a professional and approachable public presence**

COMMENTS AND REASONINGS BEHIND RATINGS

Criteria

Rating (1–5)

Section 4: Technology & Office Management

Criteria

Rating (1–5)

- 1. Uses financial software, records systems, and office tools efficiently**
- 2. Maintains digital and paper records in accordance with retention laws**
- 3. Keeps the office organized, secure, and running smoothly**
- 4. Seeks improvements to administrative processes where appropriate**

COMMENTS AND REASONINGS BEHIND RATINGS

Section 5: Communication & Professionalism

Criteria

Rating (1–5)

- 1. Communicates clearly and effectively with the Village Board, staff, and public**
- 2. Prepares clear, accurate reports and correspondence**
- 3. Maintains professionalism and discretion in all village matters**
- 4. Attends meetings and training relevant to the position**

COMMENTS AND REASONINGS BEHIND RATINGS

Section 6: Initiative & Problem Solving

Criteria

Rating (1–5)

- 1.Demonstrates initiative and independence in completing duties**
- 2.Addresses problems or concerns proactively and constructively**
- 3.Adapts to changes in policies, procedures, or technology**
- 4.Maintains a high level of accuracy and attention to detail**

COMMENTS AND REASONINGS BEHIND RATINGS

Section 7: Past Goals Review

List goals set during the last evaluation and progress made:

- Goal 1:**
- Goal 2:**
- Goal 3:**

Progress Comments:

Section 8: New Goals for Upcoming Evaluation Period

- **Goal 1:**
- **Goal 2:**
- **Goal 3:**

Additional Goal Information:

Overall Evaluation Summary

Evaluator Comments:

(Summarize strengths, improvement areas, leadership effectiveness, and community impact.)

Final Rating

- ☐ Exceeds Expectations
- ☐ Meets Expectations
- ☐ Needs Improvement
- ☐ Unsatisfactory

Signatures

Evaluator Signature: _____ **Date:** _____

Clerk/Treasurer Signature: _____ **Date:** _____

(Signature confirms the evaluation was reviewed and discussed, not necessarily agreed upon.)

Any Additional Comments may be added here. Please highlight which section or goals you are commenting on if you need more comment space: