

# Village of Palmyra

## Deputy Clerk – 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.

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### Section 1: Administrative & Clerical Duties (Rate 1–5)

| Criteria                                                                                   | Rating (1–5) |
|--------------------------------------------------------------------------------------------|--------------|
| 1.Accurately prepares, files and maintains village records in a timely manner              |              |
| 2.Assists Clerk/Treasurer with meeting agendas, minutes, and public notices when necessary |              |
| 3.Manages phone calls, emails, and public inquiries professionally                         |              |
| 4. Manages office filing systems, supplies, and routine clerical tasks                     |              |

### COMMENTS AND REASONINGS BEHIND RATINGS

**Criteria**

**Rating (1–5)**

## **Section 2: Customer Service & Public Interaction**

**Rating (1–5)**

**Criteria**

- 1.Provides friendly, respectful, and helpful service to residents**
- 2.Communicates clearly in person, by phone, and in writing**
- 3.Handles public concerns or questions with patience and respect**
- 4.Demonstrates a positive, service-oriented attitude**

**COMMENTS AND REASONINGS BEHIND RATINGS**

## **Section 3: Financial & Office Tasks**

**Criteria**

**Rating (1–5)**

- 1.Handles cash accurately and follows proper procedures**
- 2.Supports budgeting, reporting, or audit preparation as needed**
- 3.Provides assistance with payments, licenses, permits, tax payments, and other village services**
- 4.Maintains accuracy in financial entries, logs, and documentation**

**Criteria**

**Rating (1–5)**

**COMMENTS AND REASONINGS BEHIND RATINGS**

## **Section 4: Compliance & Confidentiality**

**Criteria**

**Rating (1–5)**

- 1.Maintains confidentiality of sensitive and protected information**
- 2.Follows state/local laws including open records and record retention**
- 3.Adheres to village policies, procedures, and administrative guidelines**
- 4.Ensures accuracy and compliance when handling official documents**

**COMMENTS AND REASONINGS BEHIND RATINGS**

## **Section 5: Attention to Detail**

**Criteria**

**Rating (1–5)**

- 1.Produces accurate work with minimal corrections needed**
- 2.Reviews documents carefully before submitting or filing**

| Criteria                                                         | Rating (1–5) |
|------------------------------------------------------------------|--------------|
| 3.Follows detailed instructions correctly                        |              |
| 4.Ensures data accuracy in reports, records, and financial tasks |              |
| <u>COMMENTS AND REASONINGS BEHIND RATINGS</u>                    |              |

## Section 6: Initiative, Problem-Solving, & Communication

| Criteria                                                               | (1–5) | Rating |
|------------------------------------------------------------------------|-------|--------|
| 1.Identifies issues early and seeks effective solutions                |       |        |
| 2.Uses sound judgement when making decisions                           |       |        |
| 3.Works cooperatively with staff, officials, and residents             |       |        |
| 4.Keeps Clerk informed of progress and any possible issues or concerns |       |        |
| <u>COMMENTS AND REASONINGS BEHIND RATINGS</u>                          |       |        |

## 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:*