



634 State Road 19, Marshall, WI 53559

EMPLOYEE PERFORMANCE EVALUATION

REASON FOR EVALUATION: Annual Evaluation: ____ End of Probationary Period: ____

Other: _____

DATE OF EVALUATION: _____

EMPLOYEE NAME: _____

POSITION: _____

Instructions:

1. Based on noted employee performance throughout the evaluation period, conduct a comprehensive review. Refrain from basing judgement on isolated or recent events. Concentrate on rating one factor at a time.
2. Evaluate the employee based on how well the requirements of the position are fulfilled.
3. Additional comments are required on any rating BELOW or ABOVE “meets expectations”. Describe why performance needs improvement and how performance can be improved.
4. At the evaluation meeting with the employee:
 - Review each section with the employee.
 - Identify & discuss good performance and areas that need improvement.
 - Review employee’s ratings on job performance factors.
 - Review the employee’s level of success in meeting performance goals.
5. The employee is then given time to complete the employee section of the evaluation.
6. Meet with the employee to review comments and feedback.
7. Identify goals/objectives to be achieved by the next evaluation period.

Check the appropriate box and enter comments to support the rating:

- Unacceptable: Performance is inadequate. Consistently fails to meet job requirements; performance has negative effect on results and immediate improvement must occur to maintain employment.
- Needs Improvement: Performance is generally acceptable but improvement is needed and expected. Performance at this level may casuse the Town and/or coworkers problems. Performance at this level is characterized as, “just getting by”. Performance must improve to meet expectation of position.
- Meets Expectations: Consistently able to perform job duties satisfactorily. Performance at this level is considered a stable and skilled performance.

- Exceeds Standards: Frequently exceeds job requirements and expectations. Performance at this level would generally be recognized by peers and supervisors. Performance is characterized by notable skills, initiative, and superior job knowledge.
- Outstanding: Significantly exceeds job requirements and expectations; this is the highest level of performance that can be obtained. Employee suggests and initiates improvement/changes and through own performance may enhance efficiency of the Town.

TOWN OF MEDINA CLERK JOB DESCRIPTION

Primary Duties: Perform the statutory duties of the Town Clerk as provided in section 60.33, WI Stats., and other related statutes, as well as the duties contained in Town ordinances, resolutions and policies that may be enacted by the Town Board or Town meeting. It is the responsibility of the Town Clerk to review, understand and follow these regulations as well as to keep abreast of any updates to them:

- Clerk of Town meetings under under sec. 60.15, WI Stats.:
 - Attend the Annual Meeting and all Special Town Meetings and keep a full record of the proceedings.
 - Publish and/or post any required notices and resolutions passed by the Town meeting.
- Clerk of the Town Board under section 60.33 (2) WI Stats.:
 - Assist in preparation of agendas and other notices.
 - Attend all Town Board meetings (including closed session, unless circumstances involving the Clerk dictate that the Clerk not be present) and keep a full record of the proceedings, including recording of all orders, resolutions and directions made at the meeting.
 - Publish and/or post any required notices and resolutions adopted by the Town Board.
 - File the accounts approved by the Town Board or allowed at Town meetings and enter a statement of the accounts in the Town's record books.
 - File with the Town Board claims approved by the Clerk under sec. 60.44(2) (c) WI Stats.
 - Receive all legal claims filed against the Town and take appropriate action as determined by the Town Board and legal counsel.
 - Advise the Town Board of upcoming vacancies in various Town offices or positions, notify appointees of their appointment, keep records of appointments.
 - Assist the Town Board in the development of Town policy, including but not limited to, researching questions and obtaining information for the Board at their request.
 - Inform and update Town Chair on Town activities on a regular basis.
 - Provide clerical support to the Town Board.
 - Complete other assigned duties as directed by the Town Board.
- Financial duties:
 - In cooperation with the Town Treasurer, maintain a complete record of the finances of the Town, showing receipts, disbursements and any other information relating to Town finances as prescribed by the Town Board.

- Receive bills and claims against the Town, examine and validate each document, verify appropriate budget appropriation, enter into the computer system, and issue the order to pay each bill.
- Pay validated bills and claims against the Town in accordance with the alternative claim's ordinance.
- Compile timesheets, enter time into the computer system, maintain and update payroll records in cooperation with the Town Treasurer, prepare and disburse payroll checks.
- Co-sign checks for all funds disbursed.
- Assist the Town Board in the preparation of the annual budget.
 - Research and obtain all necessary information, and generally carry out the lawful directives of the Town Board, including preparation of the necessary documents to comply with section 65.90, WI Stats.
 - Publish and/or post all appropriate notices.
- Perform all tax preparation and collection duties required of the Clerk under Chapters 70-79, WI. Stats.
 - Prepare mill rate information, special assessments and special charges for distribution to the County for calculation of property taxes and production of the tax bills.
 - Ensure that all tax preparation documents are completed correctly and in compliance with WI Statutes.
 - Certify the levy to the appropriate authorities.
- Perform duties prescribed for local Clerks in the election laws, Chapters 5-12, WI Stats.:
Maintain training and certification regarding County voting processes and equipment.
 - Publish and/or post legal notices.
 - Recommend poll workers for approval by the Town Board.
 - Maintain a poll list for the Town.
 - Prepare and acquire ballots.
 - Prepare and mail absentee ballots.
 - Supervise polling place.
 - Certify election results and deliver appropriate materials to the County Clerk on the day after the election.
 - Within 10 days after the election or appointment and qualification of any Town Supervisor, Treasurer, Assessor or Clerk, send a written notice to the County Clerk giving the name and post-office address of the officer. Notify the County Clerk of any subsequent changes in office.
 - Immediately after the election or appointment of any Town constable or municipal judge, send to the Clerk of circuit court a notice stating the name of the constable or municipal judge and the term of office. If the constable or municipal judge is filling a vacancy, indicate the name of the person who vacated the office in the notice.
- Publish and/or post ordinances and resolutions as required under sec. 60.80 WI Stats and give notice of the annual and special Town meetings as required by secs. 60-11(5) and 60.12(3) WI Stats.
- Act as custodian of the public records of the Town as provided by subch. II of ch. 19, WI Stats. and related statutes.
- Perform duties under the public records law with regard to records of which the Clerk is legal custodian.

- Responsible for all oaths, bonds, records, files, papers and property required to be deposited with the position.
- Responsible for other books, records, papers and materials where not otherwise provided for by law.
- Responsible for the disposal of obsolete records as authorized by state statutes and maintaining current Town records in a precise orderly manner according to acceptable filing procedures.
- Maintain the Ordinance Book, Resolution Book, Town Board Minutes Book, Annual and Special Town Board Meeting Minute Books, Plan Commission Minutes Book, and minutes books for all other committees/commissions.
- Issue licenses and permits as granted by the Town Board or authorized by the Town of Medina Ordinances upon presentation of a receipt from the Town treasurer showing that any required fee has been paid.
- Perform the Clerk's duties relating to public instruction under WI Stats. Chapters 115-121.
 - Within 10 days of the Clerk's election or appointment, report his or her name and post office address to each cooperative educational service agency which contains any portion of the Town.
 - Keep a map showing the boundaries of the school districts within the Town.
 - Apportion tax revenues collected by the Town for schools.

Other Duties:

- Oversee day-to-day operations of the Town Hall and Town under the direction of the Town Board.
- Provide citizens with information concerning licenses, Town business, zoning, finances and other matters of public inquiry.
- Log and expedite complaints and reports to appropriate person.
- Help citizens resolve complaints concerning Town services.
- Perform routine clerical tasks, typing, photocopying, and answering the phone.
- Maintain the Town's web site.
- Perform regular backups of computer data.
- Handle correspondence and various legal documents.
- Establish and maintain personnel files on Town employees and other employment related records.
- Provide information and assistance to the Town Assessor, Board of Review, Plan Commission, Building Inspector and other public bodies as necessary.
- Publish the Town's Annual Report, maintain the Town's website and social media.
- Complete annual recycling report and submit to Department of Natural Resources.
- Attend training sessions, meetings and seminars as directed or scheduled by the Town Board.
- Research local, county and state record files as dictated by the needs of the Town.
- Other duties as directed by the Town Board.

Qualifications:

- Strong listening, verbal and written communication and organizational skills.
- Strong attention to detail.
- Ability to work professionally and congenially with a wide variety of people in multiple situations.
- Ability to report incidents, complaints and other information in an unbiased manner.

- Independent decision making skills.
- Financial/Budgeting experience in a business setting.
- Demonstrated ability to read and understand legal documents and directives.
- Demonstrated ability to research legal issues.
- Bondable.
- Eligible to become a Notary Public.
- Proficient in QuickBooks accounting software.
- Proficient in Microsoft Word, Excel, Outlook and Internet Explorer.
- Experience in municipal accounting is preferred.

Physical requirements:

- Ability to sit or stand for long periods of time in a general office environment.
- Some weeks require long, irregular hours and evening duties.
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Normal Hours of Work and Pay

- This position has been identified as a salaried position at 40 hours per week. The Clerk must be present to staff Town Hall office hours from 8:00 a.m. to 12:30 p.m., Monday through Friday. Office hours may be adjusted with approval from the Town Board.
- The Clerk is expected to work additional hours if needed to complete the required duties.
- The Clerk is expected to attend all regular Town Board meetings each month, Special meetings when called and the Annual Town Meeting, typically held on the evening of the third Tuesday of April.
- The Clerk may be expected to attend other meetings as directed by the Town Board.
- The Clerk must be available during all elections, and for any additional hours required for absentee voting or other election administration duties.
- Rate of pay as determined by the Town Board.
- Paychecks issued biweekly on Friday.

EVALUATION

Job skills and Knowledge: Demontstrates knowledge & understanding of job duties, equipment, and appropriate work methods. Ability to perform a wide variety of job related tasks.

- Outstanding
 Exceeds Expectations
 Meets Expectations
 Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Quality of Work: Applies knowledge of skills to produce quality work; general neatness, thoroughness, and accuracy; completes assignments in a thorough and accurate manner.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Quantity of Work: Employee performs tasks thoroughly and on time.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Interaction with Others: Employee expresses ideas and information accurately and understandably in both oral and written communication. Employee's ability and willingness to work with others.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Initiative: Willing to assume new and challenging assignments. Routinely shows an interest in improving knowledge and skill level. Offers suggestions to solve problems or improve operations. Will begin tasks without the need to be directed to do so.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Dependability and Reliability: Employee's willingness to accept responsibility and ability to meet deadlines.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Attendance/Punctuality: Employee is conscientious about attendance, punctuality, breaks, etc.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

Adherence to Town Policy(s): Follows policies and procedures.

- Outstanding Exceeds Expectations Meets Expectations Needs Improvement
 Unacceptable

Comments:

Employee Feedback and Comments:

What can the Town Board do to help you succeed in this area? What changes/improvements would facilitate success in this area?

Comments:

GENERAL EMPLOYEE FEEDBACK AND COMMENTS

As a Town Board what do we do well?

As a Town Board what can we improve upon?

Additional Comments not previously identified:
