

TOOLS FOR LINKING THE CAO'S EVALUATION TO THE STRATEGIC PLAN

Many respondents to CAMA's 2014 survey on the current state of performance management in Canada submitted sample forms and templates used for performance evaluation purposes. The following are exemplary examples of best practices used throughout municipalities in Canada.

Definition: Strategic Plan

Typically a three to five year plan, the strategic plan supports the more long-term vision of a twenty-five year municipal or sustainability plan. Developing the strategic plan sets the course for newly elected officials, whose office is usually for four-year terms. Establishing the Council's strategic plan is foundational to the CAO Performance Evaluation, but ideally occurs prior to the hiring of the CAO.

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1 City of Mississauga Performance Evaluation for Senior Management—2015, Part II

EVALUATING THE PERSON AGAINST KEY RESULTS LINKED TO STRATEGIC PRIORITIES

Key results must support the strategic priorities for the performance cycle. They should be results-based, describing accomplishments that are achievable within the performance cycle. Inclusion of 3-5 key results for the current performance cycle is recommended. Effective **performance measures** should:

- Describe how we know the result has been achieved
- Define standards of quantity/quality for expected levels of achievement
- Provide the data that determines if and how well the goals have been met.
- Include “Linkages” to other departments/divisions and comments as required for the achievements of results throughout organization. Communication is required with other involved parties.

Types of performance measures to consider:

- **Efficiency** – proposed ratio of outputs to inputs, e.g. cost per output produced
- **Effectiveness** – extent to which objectives are achieved, e.g. increasing self-sufficiency by reducing dependency of clients of Program “X” by 5%
- **Output** – amount of anything produced within a given time, e.g. assessment and review of “X” special cases per month
- **Input** – the amount of resources (money, staff, time) used to produce an output, e.g. \$500,000 ceiling on costs to support initiative “Y”

- **Outcome** – intended effect, rather than what has simply been produced, e.g. help people with disabilities live in their communities and achieve greater independence. **Customer Service** – degree to which needs/expectations of the recipients of the service are satisfied with the level and quality of service received, e.g. survey average indicates a rating of “satisfied” or better

<p>Key Results: Outcomes or results to be achieved. For developing employees, results should be achievable through satisfactory performance, and should be limited to one or two. For fully proficient employees, results should be challenging and designed to stretch performance (the number will depend on the scope of the result and the level of the job. Between 2 and 5 in total).</p>
<p>Strategic Priority: Each result statement should directly support a strategic priority.</p>
<p>Performance Measures: Describe how we know the results have been achieved. Define standards of quality/quantity for expected levels of achievement. Data that determines if and how well results have been met.</p>
<p>Measures Achieved: Assessment of accomplishments in relation to Performance Measures at the end of the performance cycle.</p>

Key Results: Commitment to Quality of Life for Citizens:

- Working in partnership with the Mayor and the City Council, define the future vision, plans, goals and objectives of the City of Mississauga;
- Continuously act to maintain and enhance the quality of life for city residents through effective planning and management of city services, programs and functions

Strategic Priority: Delivering existing services, implementing our Strategic Plan, Maintaining our Infrastructure

Performance Measures:

- Ensure actions taken and results achieved are consistent with the values and environment desired by city residents;
- Customer service ratings for the City remain satisfactory or better
- Continue to leverage technology to grow citizen self-service opportunities with more on-line and mobile services and information
- Support Council in developing plans and initiatives to promote and serve community interests,
- Respond effectively to changing circumstances and adjust plans without compromising overall objectives
- Be an effective ambassador for the City by speaking at conferences and community events as requested
- Ensure key strategic projects and advancement of key master plans (e.g. Lakeview, Port Credit, Downtown, Dundas, etc.) stay on track and key milestones are achieved. For 2015 in

particular

- Advance the LRT in partnership with the province, Brampton and Metrolinx and be prepared to respond quickly and effectively should a funding announcement be made
- Meet targets on installation of ATMS
- Finalize implementation and communication on storm water rate conversion
- Deliver successful PanAm/Parapan Games and related Tourism initiatives
- Pay particular attention to development process timelines in P&B to address council concerns

Measures Achieved:

Weighting	Performance Zone
50% for total Key Results. Each Key Results is weighted individually	Rate each Key Results with the appropriate performance zone. Refer to Part 2 of the Scoring Guidelines (separate document)

Key Results: Excellence in Policy Facilitation:

- Facilitating Council’s goals and objectives by assisting in the development of policy initiatives to best serve community interests.
- Ensuring adequate and due diligence is completed prior to communications on all major strategic and business plan initiatives.

Strategic Priority: Delivering Value for Money through Continuous Improvement

Performance Measures:

- Ensure Council receives sound advice and information in planning and evaluating policy initiatives;
- Evaluate city policies and resulting programs and services, and identify appropriate changes, deletions, or additions to improve or enhance outcomes and the reputation of the city;
- Recognize interdependence of city governance with key stakeholders in the community, and help build cooperation and consensus among and within diverse groups in helping them identify common goals in servicing community needs;
- Recognize emerging issues and need for change, and respond in an appropriate and timely manner;
- Ensure Council is well informed on current policies and their resulting outcomes;
- Act as the facilitator to define and manage excellent relationships with the Region of Peel, the Provincial Government, the Association of Municipal Organizations (AMO), the Federation of Canadian Municipalities and other branches of government and the broader public sector in general.
- Support Council and the Mayor in advocacy efforts during federal election scheduled for 2015

Measures Achieved:

Weighting	Performance Zone
50% for total Key Results. Each Key Results is weighted individually	Rate each Key Results with the appropriate performance zone. Refer to Part 2 of the Scoring Guidelines (separate document)

Key Results: Building Trust through Council and Staff relations:

- Maintaining an open, responsive relationship with Council and supporting Council in achieving their goals and objectives;
- Co-ordinate and facilitate the flow of information between the administration and Council and its Committees.

Strategic Priority: Continuing to be an Employer of Choice (focus on leadership)

Performance Measures:

- Assists the council in resolving problems at the administrative level to avoid unnecessary council action;
- Carries out directives of the council as a whole rather than those of any one council member;
- Is courteous, sincere and positive in attitude and response to citizens and Council;
- Shows willingness to be helpful and responds promptly and effectively to inquiries and requests by Council and others;
- Receptive to constructive criticism and advice;
- Regular status reports are provided on progress towards Council objectives;
- Quarterly meetings are held with CMO and Council EA's re the Communication Protocol.
- Continued focus on Talent Management and Succession Planning to prepare for increasing numbers of employees eligible for retirement
- In 2015, conduct an employee engagement survey to measure staff morale and satisfaction, and effectively respond to any issues identified in the survey
- Deliver a successful Leadership Conference and development opportunities to ensure high level of people leadership in the organization is maintained

Measures Achieved:

Weighting

50% for total Key Results. Each Key Results is weighted individually

Performance Zone

Rate each Key Results with the appropriate performance zone. Refer to Part 2 of the Scoring Guidelines (separate document)

Key Results: Implement the approved business plan for 2015**Strategic Priority: Deliver the right services; Invest in Infrastructure****Performance Measures:**

- Drive improvements in corporate performance through the roll out of tools like LEAN and innovation training
- Enhance performance measurement and improve the overall quality and accuracy of performance measures in the business plan
- Promote fiscal discipline and accountability;
- Continue to call for 1% annual savings on operating costs during budget preparation (after doing this for several years, this is becoming harder to deliver without service impact)
- Ensure proper processes are in place for capital budget priority setting, the maintenance and funding of critical infrastructure, and identification of funding gaps
- Ensure the City is positioned to access all funding programs for which it is eligible from senior levels of government
- Work with Council on leading an independent, third party service review (if approved)
- For 2015, ensure negotiated collective agreements with city’s bargaining units are within the Council approved mandate, and avoid any unnecessary job action

Measures Achieved:**Weighting**

50% for total Key Results. Each Key Results is weighted individually

Performance Zone

Rate each Key Results with the appropriate performance zone. Refer to Part 2 of the Scoring Guidelines (separate document)

PART III – DEVELOPMENT PLANNING

DEVELOPMENT PLANNING – Areas that require focus may be selected from the Leadership Behaviours or Key Results outcomes

#1 – Area of Development

Area of Development (Task, skill and/or behaviour):

Staying abreast of current trends

Success Measurement:

Action/Activity (formal training, on the job, coaching):

Attend conferences and workshops like CAMA, AMO and monitor trends and opportunities

Resources: (People, Financial)

Timelines:

Annually

Results from development plan:

PART IV – OVERALL RATING OF PERFORMANCE

Consider individual ratings for Key Leadership Competencies and Key Results to come up with a composite assessment of overall performance. See Scoring Guidelines. Select:

Exceeds

Fully Satisfactory

Generally Satisfactory/Some Improvement Needed

Unsatisfactory

CAREER PLANNING

- Completion of this section is **OPTIONAL** for individuals interested in a Career Opportunity
- Identify the next position or opportunity/activity in the development plan for the employee to prepare for future assignments
- May refer to skills, abilities or knowledge

PART V – CORPORATE POLICIES & PROCEDURES

It is important for employees to know what is expected of them. The following policies support the City's goal to ensure a climate of mutual respect and serve to clarify the City's expectations regarding the general behaviour of employees in performing their duties in a responsible and professional manner.

The City's Universal Policies:

- Standard of Behaviour
- Respectful Workplace
- Workplace Violence
- Conflict of Interest
- Access to and Acceptable Use of IT Resources

Job Related Policies and Procedures:

Corporate Policies provide direction to staff for consistent decision making and outline specific procedural requirements for staff to follow. By reviewing the Corporate Policies listed below, you ensure your understanding of and compliance with the policies and procedures that govern your business area or apply specifically to your job.

Acknowledgement:

I have read and understand the City's Universal Policies

I have read and understand the job related Policies as indicated (above) as they relate to my job function

PART VI – COMMENTS & SIGNATURES

EMPLOYEE COMMENT:

Mayor and Members of Council Comment:

Employee Signature: _____ Date _____

Mayor's Signature: _____ Date _____

Review period of: April 1, 20XX to March 31, 20XX

start here

GUIDANCE TO PERFORMANCE ASSESSMENT FACTORS

Rate each factor according to your perception of the performance of the CAO in the past year. Please provide narrative comments or examples to illustrate, if possible.

RATING CRITERIA

1. Outstanding
2. Above standard
3. Standard (satisfactory)
4. Below standard

1. Assistance to the board in understanding its governance role?

- a. Preparing an orientation program and suitable materials for a new board
- b. Identifying the needs/priorities of this board
- c. Committing to equal treatment/courtesy/assistance
- d. Providing advice on potential areas of conflict/pecuniary issues
- e. Seeking to develop a relationship based on mutual respect, trust and integrity
- f. Ensuring access to relevant training programs for board members
- g. Being responsive to the feedback and input received from members of the board
- h. Communicating advice to the board that will assist it in its governance responsibilities
- i. Communicating any issues of concern to the board impacting its relationship to the administration
- j. Monitoring legal implications of issues; being aware of the board's legal and legislative requirements
- k. Ensuring ready access to useful policy-based information
- l. Maintaining appropriate boundaries; assuring equal treatment
- m. Providing quality control on advice going forward
- n. Ensuring an ongoing degree of open communication with the board; presenting reasonable and professional views in a straight-forward yet pleasant manner.

RATING:	
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COMMENTS:	

2. Relationship building with the chair

- a. Meeting with the new chair immediately following election
- b. Identifying concerns of the chair; addressing his/her expectations, style and needs issues
- c. Ensuring the apolitical nature of the relationship clear (including no personal connection to outgoing chair)
- d. Identifying areas of potential overlap & strategies to address
- e. Ensuring chair prepared for any engagements/speeches
- f. Ongoing briefings and meetings held on scheduled basis

RATING:	
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COMMENTS:	

3. Policy advice and leadership on the key issues:

- a. Assistance in identifying key issues; offering strategic advice addressing such issues
- b. Ensuring both board members and administration aware of importance of policy development
- c. Providing quality advice and guidance to board on identified issues
- d. Coordination and preparation of draft policy statements
- e. Strength of administrative leadership as observed in terms of the CAO's decision-making ability (e.g. decisiveness, quality of decisions)
- f. Advice to board on importance of strategic planning as a leadership tool; assistance to board in planning/designing a strategic planning session
- g. Implementing approved policy; monitoring policy implications
- h. Review/monitoring of financial controls/audit reports/business plan and budget

RATING:	
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COMMENTS:	

4. Fiscal management

- a. Ensuring the development of a comprehensive, inclusive and transparent process of business planning and budgeting
- b. Ensuring that the board provides guidance to the administration in the development of both plans and budgets
- c. Providing board with accurate, comprehensive advice on the current status of the fiscal condition of the CVRD
- d. Advising board on the status of any changes required by the external auditor; acting promptly on audit recommendations

RATING:	
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COMMENTS:	

5. Leadership of the administrative team:

- a. Providing ongoing, consistent leadership to department heads and through them to the full administration
- b. Communicating effectively and regularly; providing ongoing guidance/direction
- c. Making administrative decisions within constraints of bylaw/policies
- d. Providing inspiration and modeling of a desire to be the best
- e. Delegating/empowering within reasonable limits
- f. Supervising direct reports and expecting results
- g. Disciplining behaviour and correcting promptly
- h. Ensuring sound corporate communications plan
- i. Ensuring that senior staff are involved in the process of developing CVRD goals and priorities; providing a forum for Board and senior staff to engage in discussions relative to the CVRD's strategic plan

RATING:	
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COMMENTS:	

6. Discharge of all legislative and bylaw requirements:

- a. Determining changes to the organizational structure
- b. Continually assessing the needs of the system; seeking the advice of senior staff in this process
- c. Developing a sound policy-based and cross-organizational approach to recruitment & selection
- d. Ensuring a planned approach to training/development
- e. Attending suitable conferences/courses as an example
- f. Establishing mechanisms for mentoring other supervisory staff
- g. Fulfilling all Act and bylaw requirements

RATING:	
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COMMENTS:	

7. Balancing the diverse demands of the directors of both the electoral areas and urban centres

- a. Ensuring that the directors of the electoral areas are able to access the appropriate senior staff in meeting their requirements
- b. Meeting with the electoral area directors on a regular basis; providing advice at any regularly scheduled meetings
- c. Meeting with the administrative leaders of the urban centres on related issues
- d. Providing advice to the chair in preparation for his/her meetings with board directors

RATING:	
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COMMENTS:	

8. Development of regional relationships:

- a. Maintaining a positive profile in the CVRD's jurisdiction as the senior administrative spokesperson and leader

- b. Ensuring that board members and the chair have access to sound advice on how to engage the public (community communication plan)
- c. Maintaining contact with other administrative leaders in the region and with other key administrative leaders throughout the Province
- d. Developing a positive/constructive rapport with media
- e. Ensuring the development of administrative protocol to develop courteous relationships with the public

RATING:	
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COMMENTS:	

Form completed by director:

Signature

Return by month DD, YYYY attention:

Chair XXXX XXXX
c/o 600 Comox Road, Courtenay, BC V9N 3P6

Email:

PERSONAL AND CONFIDENTIAL

3 City of Moose Jaw Competency Review

Competency-Based Performance Review

Employee Name

Job Title

City Manager (CAO)

Department

Supervisor

Period of Evaluation

Instructions

The criteria listed in this evaluation should accurately reflect the employee's overall performance as it relates to the duties/expectations set forth in his or her job description.

Rate the employee in each section of this form according to the table below. Be sure to add comments, thoughts, and observations that are important or relevant to the individual and the evaluation process.

- | | |
|---|--|
| 1 | UNACCEPTABLE
Consistently fails to meet job duties and expectations; performs at a level demonstrably below corporate requirements; improvement required immediately to maintain employment. |
| 2 | NEEDS IMPROVEMENT
Occasionally fails to meet job duties and expectations; considerable improvement needed to meet job requirements. |
| 3 | MEETS EXPECTATIONS
Performs job duties at a satisfactory level according to job description, under normal supervision and direction. |
| 4 | EXCEEDS EXPECTATIONS
Often exceeds job requirements; consistently meets goals and objectives; accomplishments occasionally made in areas outside normal job role. |

Competency Rating

Accountability

Definition

Takes personal ownership and responsibility for the quality and timeliness of work commitments. Follows organizational guidelines, professional standards, regulations and principles. Demonstrates reliability and integrity on a daily basis.

- Responds to job related commitments by meeting deadlines and being reliable.
- Reviews and assumes additional responsibilities.
- Balances organizational, team and individual commitments.
- Takes responsibility and ownership over team commitments and mistakes.
- Respects individual, team and organizational confidentiality.
- Evaluates and responds to complex requirements that support organizational direction.
- Displays a high level of organizational confidentiality and respects the sensitivity of information.
- Response to organizational quality by recognizing critical errors in processes and practices.
- Obtains and evaluates information, resources and training required to meet organizational requirements.
- Ensures that organizational guidelines, professional standards, regulations and principles are integrated within organizational commitments.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Adaptability

Definition

Adapting and responding to changing conditions, priorities, technologies and requirements. Recognizing new information and ideas with a willingness to alter opinions and behaviours.

Applying versatility, reasoning and innovativeness in the face of change. Ability to comfortably collaborate in a variety of situations and with diverse individuals.

- Responds positively to changing needs and conditions.
- Continuously adapts his/her behaviours and approaches to address specific situations.
- Supports the organization by adapting long term plans, goals, assignments and approaches to meet the needs of changing situations.
- Recognizes potential situations and responds with solutions, tactics or approaches to reduce or eliminate issues.
- Plans and initiates complex changes in order to enhance the organization.
- Strategically plans and initiates long term goals and changes to ensure the organization is responsive to a diverse range of needs and situations.
- Considers benefits, costs and impacts to the overall organization.
- Shifts priorities and alters strategies to respond to emerging opportunities or risks.

Unacceptable **1**

Needs Improvement **2**

Meets Expectations **3**

Exceeds Expectations **4**

Comments:

Analytical Thinking

Definition

Applying systematic, logical reasoning when addressing problems or situations in order to arrive at an appropriate solution or outcome. Considers the various issues and components of the problem, develops sequential steps to address the situation and determines rational timeframes and priorities.

- Responds to and recognizes discrepancies and components of a situation.
- Continuously considers the components of a situation in order to determine an appropriate solution.
- Looks at past practice and gathers additional information in order to make sound choices.
- Adjusts and reprioritizes timeframes and deadlines in response to new situations or information.
- Recognizes situations and examines facts in order to develop clear steps and solid assumptions.
- Adjusts and reprioritizes timeframes and deadlines in response to new situations or information.
- Evaluates, interprets and analyses critical, complex information.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Communication

Definition

Expressing and transmitting information with consistency and clarity, using active listening techniques in order to effectively understand provided feedback, summarizing information according to the audience in order to promote engagement and increase understanding.

Key Actions

- Effectively listens and communicates.
- Ensures that communication efforts meet the needs of various groups and is properly understood.
- Communicates effectively with various individuals and groups by taking into account verbal and written comprehension requirements.
- Adapts communication to respond to audience or situational requirements.
- Reviews and disseminates critical and important information in order to share key points with others.
- Strategically communicates for maximum results.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Decision Making

Definition

Makes concrete, well-informed and thought out decisions that support the overall organization. Has the ability to make quick effective decisions even when data and details are limited. When making unfavourable decisions that might have negative consequences will examine the impacts and potential implications to ensure that decision is valid for the situation.

Key Actions

- Responds to work responsibilities and situations by making decisions that are common practice and expected of the position.
- Is able to adapt decision making based on circumstances or when presented with unclear information.
- Makes decisions on the fly or in the face of missing information that supports the organization even if it may be perceived as unfavourable.
- Explains the rationale for strategic decisions that impact the workplace.
- Makes strategic decisions that support the organization while clearly identifying current and future impacts or implications.
- Aligns decisions with the mission, vision, values and future direction of the organization.

Unacceptable **1**

Needs Improvement **2**

Meets Expectations **3**

Exceeds Expectations **4**

Comments:

Leadership

Definition

Maintains a professional and positive manner even under changing or uncertain conditions.

Works well with a wide range of individuals to provide, support, coaching, encouragement and direction. Engages others in order to accomplish organizational goals and strategies.

Key Actions

- Responds positively to changing needs and conditions.
- Promotes and builds internal commitment.
- Builds on the strengths of the workplace and reduces internal weaknesses through training and development.
- Considers both organizational needs and individual needs in order to create solutions that will enable top performance and success.
- Recognizes strengths and weaknesses of others and will match duties accordingly.
- Recognizes areas for improvement within oneself and others and will develop those areas through internal and external resources.
- Provides recognition and encouragement to team and others within the organization.
- Champions the organization both internally and externally, models exceptional behaviour.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Negotiation

Definition

Gains support of ideas, proposals and solutions from others, helps others to understand complex initiatives and sensitive situations to resolve disagreements and conflicts, reaches deals and compromises that work best for the organization, considers other opinions while holding strong to firm directions and goals.

Key Actions

- Responds to conflict directly and uses facts to gain support.
- Considers the audience to customize an approach that will gain support.
- Includes organizational needs and initiatives in order to develop solutions that build momentum.
- Remains objective and neutral, clarifies the issues and concerns of all sides to assist in collaboration and solution building.
- Recognizes when parties are unwilling to compromise and adapts approach in order to resolve the issue.
- Builds trust and strong supports to push objectives forward and develop win/win solutions.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Organizational & Environmental Awareness

Definition

Shows commitment to the organizational vision and strategic goals by acting in accordance to organizational expectations and through having a solid understanding of the internal environment. Uses knowledge of organizational and business climate to solve issues and accomplish goals and business strategies, complies with and enforces organizational policies, procedures and practices.

Key Actions

- Responds appropriately to organizational operations with a solid understanding of the mission, vision and values.
- Continuously aligns position to overall objectives of the organization.
- Understands how positional and team responsibilities relate to and impact other internal teams or groups by taking actions that increase internal cohesiveness.
- Aligns the internal environment to the overall direction of the organization.
- Ensures actions meet both internal and external needs by aligning organizational policies, procedures and practice with external laws, legislation and rules.
- Communicates how the vision and established goals of the organization align with the objectives, projects and responsibilities of internal team or groups.

Unacceptable **1**

Needs Improvement **2**

Meets Expectations **3**

Exceeds Expectations **4**

Comments:

Planning and Organizing

Definition

Accurately estimates duration and level of difficulty of tasks and projects, setting out goals and objectives and work plans to complete.

Key Actions

- Responds to positional, departmental and organizational needs by effectively managing priorities and responsibilities.
- Continuously adapts priorities and responsibilities in response to changing needs.
- Evaluates the progress of tasks, responsibilities and projects against schedule timeframes in order to stay on track.
- Recognizes potential concerns or opportunities and makes necessary adjustments in order to respond to changing needs.
- Manages multiple priorities and establishes timeframes and resources that are reasonable and attainable.
- Develops and oversees multiple plans for internal groups and teams, anticipates risks and takes appropriate steps.
- Analyzes and responds to risks related to teams or groups with a focus of reducing or eliminating perceived issues.
- Implements plans that are clear, manageable and attainable given the current and future expectations of individuals, groups and teams.
- Develops and oversees strategic plans that impact the overall organization.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Problem Solving

Definition

The ability to break a situation down into smaller pieces to identify key issues and determine cause and affect relationships.

Using logic and analytical methods to come to realistic solution.

Key Actions

- Responds to issues by offering solutions that fall within the positional responsibilities, involves others as required.
- Considers the issue from various angles, develops multiple solutions and adapts approach where and when required.
- Analyzes complex issues to develop approaches or solutions that are considered forward thinking and best practice.
- Anticipates obstacles and thinks of next steps and alternatives.
- Stays updated on best practices and recommended actions in order to identify new approaches and methods that can be utilized to improve solution building.
- Develops solutions that consider internal and external factors with the focus on the long term objectives of the organization.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Resource and Fiscal Management

Definition

Efficiently using resources such as human capital, supplies, products, materials and other useable products with foresight to available and limited funds.

Key Actions

- Controls and limits the use of internal resources.
- Understands and appreciates the time restrictions of others; limits questioning and conversations to essential requirements of the position.
- Analyzes job duties to determine wasteful practices that could be improved for greater efficiency.
- Makes positional decisions that align with organizational resource and financial limitations.
- Adheres to all internal control procedures, forwards concerns and complies with organizational policies, procedures and practices surrounding resources, time and finances.
- Ensures that internal teams and groups are aligned with organizational resource and financial limitations.
- Monitors organizational or departmental budgets, ensuring compliance, offering feedback and cost saving alternatives to senior management.
- Develops and maintains an internal control system that protects organizational funds and assets.
- Monitors and develops overall liabilities, revenues and expenditures; revises and realigns budgets and commitments based on changing needs.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Results Orientation

Definition

The ability to focus on desired outcomes, and the means by which they are achieved, by meeting and or exceeding standards based on past performance, goals and objectives, as well as the performance and/or achievements of others.

- Operates with high attention to detail regarding organizational and departmental performance goals.
- Continuously strives to meet or exceed organizational and departmental goals and objectives.
- Demonstrates a focus on finishing all tasks assigned in a timely manner while taking complete ownership of tasks.
- Adapts performance and goals to help move projects along, volunteers their help to ensure every task is completed efficiently.
- Ensures that individual and the goals of others align with positional and organizational requirements.
- Holds oneself and others accountable for effectively meeting and exceeding organizational and departmental goals.
- Acts as a role model or coach for others to drive positive results.
- Establishes challenging goals for oneself and acts to reach and exceed them; holds others accountable for their own goals.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Service Orientation

Definition

Providing superior service to both internal and external customers.

- Responding to client needs and internal requests.
- Follows through on commitments and responds to inquiries, emails, requests and complaints in a timely fashion.
- Working on a continuous basis to meet or exceed client and organizational needs.

- Go above and beyond regular client and organizational expectations by offering added value.
- Builds and maintains connections with internal and external groups that could improve organizational delivery and/or client satisfaction.
- Analyzes and anticipates the clients long term business needs by establishing a clear sense of their organizational and business strategies.
- Builds strong collaborative and mutually beneficial relationships with clients and partner agencies.
- Identifies future/prospective clients and develops strategies for gaining/attaining their business.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments:

Strategic Thinking

Definition

Analyzes and interprets the strategic direction of the organization and has a clear understanding of the vision, mission, values and objectives using this information to develop responsibilities, tasks, goals and initiatives. Reflects on past experiences, organizational practices and processes to determine the correct course of action. Is able to analyze the internal and external environment in order to identify current and future opportunities, challenges and risks.

- Has a clear understanding of organizational objectives and aligns position to strategic requirements.
- Gathers and analyzes organizational information by using past experience and knowledge.
- Aligns the internal environment to the overall objectives and strategies of the organization.
- Engages others within the workplace and team to organizational objectives and strategies, links positions and teams by communicating the importance of roles and tasks.

Unacceptable **1**

Needs Improvement **2**

Meets Expectations **3**

Exceeds Expectations **4**

Comments:

Teamwork

Definition

Works cooperatively and effectively with others to reach a common goal. Actively participates in group activities in an effort to foster a positive and productive team environment.

- Participates in team or group activities, offers help to team members.
- Shares ideas, concerns and solutions with the team.
- Encourages others to participate in team activities, ensures teams are working effectively.
- Recognizes and responds to team members who are not participating either through encouraging them to be involved or through assigning responsibilities.
- Capitalizes on the strengths, weaknesses, skills and abilities of team members by assigning tasks and responsibilities that align with individual strengths.
- Encourages team members to work together in order to build on weaknesses and strengths either through mentoring or coaching.
- Places a high value on teamwork and sets values and objectives that encourage team cohesiveness.

Unacceptable	1
Needs Improvement	2
Meets Expectations	3
Exceeds Expectations	4

Comments: