

Organization ABC

Performance Planning, Evaluation and Development

Mary Jones

January 1, 2010 – December 31, 2010

Exceeded: Consistently exceeded position requirements. Achievement of commitments and performance of duties clearly superior. Requires absolute minimum of supervision.

Achieved: Results relevant to the job and level consistently achieved and sometimes exceeded expectations. Delivered the typical level of performance for the job. Demonstrated most competencies required for the position.

Development needed: Results relevant to the job and level often achieve expectations. Missed several commitments and/or expected results. Performed close to the level expected for this job and level. Demonstrated some of the competencies required for this position but some help is still needed.

Underperformed: Failed to achieve a significant or multiple commitments and/or expected results. Performed below the typical level of performance for the job. Demonstrated limited competencies required for the position. Corrective action is needed.

Agency Culture – The ED sets the “tone” for the organization, particularly in terms of commitment to mission, principles, and maintenance of high ethical standards.

- Supports and develops a positive work environment characterized by and understanding and commitment to ABC’s mission, values and agency strategies
- Clearly demonstrates and articulates a commitment to employment diversity and adherence to the highest ethical standards
- Ensures adequate controls and the soundness of the organization’s financial structures

- Underperformed
- Development needed
- Achieved
- Exceeded

Strategic Focus – The ED plans and develops the organization’s objectives and strategies in conjunction with the ABC Board and management team.

- Strategies are clear, focused and support ABC’s mission and goals
- Board agendas are adequately focused on planning, goal-setting and performance measurements and those issues which require board approval
- Significant information regarding agency, financial, legal, and public relations issues is clearly presented

- Underperformed
- Development needed
- Achieved
- Exceeded

Board Relations – The ED keeps the BOD informed of issues which may affect the organization and consults with them on any problems or issues that may impact the possible success or failure of the organization’s objectives and initiatives.

- Works closely with the BOD chair to provide focus on significant issues in establishing BOD agendas
- Maintains appropriate flow of relevant information to the BOD in a timely fashion
- Is available and responsive to the BOD at all times
- Is clear and straightforward at all times in responding to BOD inquiries

- Underperformed
- Development needed
- Achieved
- Exceeded

Organization Performance – The ED is responsible for the overall direction and management of ABC and for achieving service levels, financial performance and operating results consistent with established goals and objectives. For 2010, those goals include:

- Achieves budgeted revenue targets
- Achieves budgeted bottom-line financial goals
- Achieves client service satisfaction goal
- Achieves operational requirements of all funding sources

- Underperformed
- Development needed
- Achieved
- Exceeded

Personal Leadership – The ED focuses the organization and its resources on effectively accomplishing ABC’s strategic goals and objectives:

- Provides general oversight and directions to the functions and operations of ABC
- Communicates appropriately with management and other staff
- Selected, develops and motivates staff in order to ensure high level productivity
- Maintains effective succession planning processes
- Creates an environment that allows for open and honest communication

- Underperformed
- Development needed
- Achieved
- Exceeded

Agency Image – The ED strives to make the organization fulfill its critical role within the community and maintain its image with all of its constituencies including clients, funders and the general public:

- Represents ABC, as appropriate, with individual clients, funders, professional groups, media and government agencies
- Represents ABC at community, state, and national meetings/conferences related to ABC's programs and services
- Actively participates in local and statewide civic and community activities and organizations
- Ensures ongoing interaction and communication with partner agencies

- Underperformed
- Development needed
- Achieved
- Exceeded

Overall Rating:

- Underperformed
- Development needed
- Achieved
- Exceeded