

# Performance Development and Assessment

Staff Member's Name:	
Position:	Integrated Services Case Manager
Manager's Name:	
And the second s	
Review Period:	
Employees Comments:	
Managers Comments:	
Date Key Deliverables agreed:	
(Manager)	(Staff Member)
Date Performance Review Com	pleted:
Performance Review Agreed: (Refer to page 23 of the guideli	nes) Yes / No
Manager)	(Staff Member)
Overall rating:	

# Key Deliverables - refer page 8 of guidelines

# Ratings:

# Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

# Expectation Achieved

Key deliverable and agreed measure(s) met.

# Exceeded Expectation

Exceeded the key deliverable and measure(s).

Key Deliverables	
Participation in Business Practices  actively and appropriately participates in new initiatives in the business promotes online and other self- service channels to clients and influences clients to contributes positively to the successful implementation of national, regional and site	ose these services
Self Assessment:	
Manager's Comment:	Rating:
Client Development Activities	
<ul> <li>identifies clients with multiple and complex needs to ensure they meet the criteria for Response (ISR) and refers clients who do not require an integrated services respons appropriate service provider (e.g. a case manager, external agency) in a professional develops and implements comprehensive integrated services plans for clients that develops and implements comprehensive integrated services plans for clients that develops and implements comprehensive integrated services plans for clients that develops are managed effectively.</li> <li>ensures engagement with clients, boundary setting, and gaining agreement on the profise is risks related to the clients case and manages risk in accordance with Minipractices.</li> <li>plans are regularly reviewed and kept current to reflect the clients current needs/circ case reviews indicate appropriate interventions that demonstrate a clear link to achie outcomes.</li> <li>ensures effective transition of clients from ISR to less intensive support as clients' needs appropriate referrals to other agencies.</li> <li>contributes to the successful implementation of national and regional strategies, contributes to the successful implementation of national and regional strategies, contributes to the successful implementation of national and regional strategies, contributes to the successful implementation of national and regional strategies.</li> </ul>	se to another and timely manner emonstrate a clear nsultation with progress and steps stry policy and cumstances evement of agreed
Self Assessment:	
Manager's Comment:	Rating:

Key Deliverables	
Client Outcomes	
Takes an active approach to client engagement which supports Work and Income's and	the Government's
performance targets:	
<ul> <li>clients receive the right level of support and are committed to achieving goals</li> </ul>	
child development and safety needs are met	
a cliente ere independent and safety freeds are lines	
clients are independent and self-reliant and have improved social, health, education	and employment
outcomes as a result of the family plan and the ISR contribution	
Self Assessment:	
Manager's Comment:	Rating:
Polationship Monagement/Networking	
Relationship Management/Networking	
• develops and maintains effective links with a range of other people and agencies to	maximise services
built on interagency collaboration.	1/ /
• identifies and engages with appropriate stakeholders in developing and delivering pl	<u>~</u>
<ul> <li>works collaboratively with community and government agencies to provide joined up</li> </ul>	solutions that
contribute to the successful outcomes for the client	
· ongoing liaison and exchange of information with other agencies in respect to service	es nalicies and
operational processes, and any changes that occur.	co, policico and
operational processes, and any changes that oother	
Self Assessment:	
Self Assessment:  Manager's Comment:	Rating:
	Rating:
	Rating:
	Rating:
Manager's Comment:	Rating:
Manager's Comment: Timeliness	Rating:
Manager's Comment:  Timeliness  • supports the site to achieve service excellence standards:	
Manager's Comment:  Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completely achieved the standards of the service centre are completely achieved the service centre achieved the ser	
Manager's Comment: Timeliness	
Manager's Comment:  Timeliness  • supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed to the centre of the cent	eted within 5 days
Manager's Comment:  Timeliness  • supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed to the centre of the cent	eted within 5 days
Timeliness  • supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  • 95% who be seekers with current work obligations have a RecruitMe profile of receipt of receipt and the service centre are completed to the service of granting a new application	eted within 5 days completed within 24
Manager's Comment:  Timeliness  • supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed to the centre of the cent	eted within 5 days completed within 24
Manager's Comment:  Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  65% of job seekers with current work obligations have a RecruitMe profile of hours of granting a new application  elient outcomes as contained in the client's integrated services plan are achieved with timelines.	eted within 5 days completed within 24 thin agreed
Manager's Comment:  • supports the site to achieve service excellence standards:  • 90% of all benefit entitlement assessments in the service centre are completed by the selection of research to the service centre are completed by the selection of granting a new application  • elient outcomes as contained in the client's integrated services plan are achieved with timelines  • all mandatory process for recording client information is completed in the required timelines	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  Timeliness  Exports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  15% of job seekers with current work obligations have a RecruitMe profile of the profile of th	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed by the service of the service centre are completed in the service centre ar	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  Timeliness  Exports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  15% of job seekers with current work obligations have a RecruitMe profile of the profile of th	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  **Timeliness**  **Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  • \$5% of job seekers with current work obligations have a RecruitMe profile of hours of granting a new application  • elient autoomes as contained in the client's integrated services plan are achieved with timelines  • all mandatory process for recording client information is completed in the required timelines  • ISR Reports submitted within required timeframes  • referrals to other agencies/service providers are made in a timely manner	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed by the service of the service centre are completed in the service centre ar	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  **Timeliness**  **Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  • \$5% of job seekers with current work obligations have a RecruitMe profile of hours of granting a new application  • elient autoomes as contained in the client's integrated services plan are achieved with timelines  • all mandatory process for recording client information is completed in the required timelines  • ISR Reports submitted within required timeframes  • referrals to other agencies/service providers are made in a timely manner	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  **Timeliness**  **Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  • \$5% of job seekers with current work obligations have a RecruitMe profile of hours of granting a new application  • elient autoomes as contained in the client's integrated services plan are achieved with timelines  • all mandatory process for recording client information is completed in the required timelines  • ISR Reports submitted within required timeframes  • referrals to other agencies/service providers are made in a timely manner	eted within 5 days completed within 24 thin agreed me frame.
Manager's Comment:  Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed for the service service service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed for the service of granting a new application  elient automes as contained in the client's integrated services plan are achieved with timelines  all mandatory process for recording client information is completed in the required time 95% - 100% of all clients who are enrolled in CST have an assessment completed we ISR Reports submitted within required timeframes  referrals to other agencies/service providers are made in a timely manner	eted within 5 days completed within 24 thin agreed me frame.
Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed by the service of granting a new application  elient automes as contained in the client's integrated services plan are achieved with timelines  all mandatory process for recording client information is completed in the required timelines  ISR Reports submitted within required timeframes  referrals to other agencies/service providers are made in a timely manner  Self Assessment:	eted within 5 days completed within 24 thin agreed me frame. vithin four weeks
Manager's Comment:  **Timeliness**  **Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed of receipt  • \$5% of job seekers with current work obligations have a RecruitMe profile of hours of granting a new application  • elient autoomes as contained in the client's integrated services plan are achieved with timelines  • all mandatory process for recording client information is completed in the required timelines  • ISR Reports submitted within required timeframes  • referrals to other agencies/service providers are made in a timely manner	eted within 5 days completed within 24 thin agreed me frame.
Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed by the service of granting a new application  elient automes as contained in the client's integrated services plan are achieved with timelines  all mandatory process for recording client information is completed in the required timelines  ISR Reports submitted within required timeframes  referrals to other agencies/service providers are made in a timely manner  Self Assessment:	eted within 5 days completed within 24 thin agreed me frame. vithin four weeks
Timeliness  Supports the site to achieve service excellence standards:  90% of all benefit entitlement assessments in the service centre are completed by the service of granting a new application  elient automes as contained in the client's integrated services plan are achieved with timelines  all mandatory process for recording client information is completed in the required timelines  ISR Reports submitted within required timeframes  referrals to other agencies/service providers are made in a timely manner  Self Assessment:	eted within 5 days completed within 24 thin agreed me frame. vithin four weeks

Key Deliverables	
Accuracy Supports the site to achieve service excellence standards:	
<ul> <li>90% of all client entitlements are correctly identified and processed</li> </ul>	
90% of RecruitMe profiles are in accordance with accepted quality standards	
Reports meet expected quality standards	
• Maintains complete, concise and up to date client records and ensures all require	ed documentation eg
consent forms are completed within agreed timeframes and to agreed quality sta	
Information in client service tool (CST) electronic case management system is continuous.	omplete and accurate.
Self Assessment:	-70
	$\rho$ . $\rho$
Manager's Comment:	Rating
Service Quality	
Makes individual contribution to service quality by:	
individual contribution to service quality monitor	
maintains excellent service in line with the national service standards.	,
Self Assessment:	
Managar's Composite	
Manager's Comment:	Rating:
ADDITIONAL KEY DELIVERABLES	
ADDITIONAL KEY DELIVERABLES use this section to record any additional result areas or projects you have been responsible for	during the year
What is to be achieved:	Take the like he did not be to have a state of the design of the con-
Self-Assessment:	
Manager's Comment:	Rating:

englika di karengan relesa kelebah bera S	uccess Factors - refer to page	e 11 of guidelines	
Ratings:			
Needs Development  Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.	Competent  Demonstrates the appropriate behaviours.	Strength  Always demonstrates the highest standards of behaviour across all situations and is a role model for others.	
Success Factors			
People Skills  Demonstrates strong interpersonal skills.  is confident when working with clients and colleagues  treats all people with dignity and respect  demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others  demonstrates the ability to work positively with others to achieve outcomes  stays calm, objective, and positive during difficult situations  demonstrates the ability to resolve conflicts.  Self Assessment:			
Manager's Comment: Rating:			
Communication Skirs  Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources  communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language  is able to simplify complex issues when required  questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation.  Self-Assessment:			

Manager's Comment:

Rating:

Success Factors	
Partnerships and Relationship Management  Builds a network of contacts both within and beyond Work and Income  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wide identifies, develops and uses both internal and external networks that add value or preserved in partnership with internal and external contacts where appropriate, in order to and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while successful.	ovide opportunities maximise services
Self Assessment:	
Manager's Comment:	Rating:
Maximising Knowledge and Application  Uses all resources available in order to deliver successful outcomes.  • keeps knowledge of relevant business group specific and MSD products and services shares this knowledge with others  • coaches colleagues through errors to ensure that future mistakes are avoided  • understands and applies all relevant policies, quidelines and standards  • positively supports and accepts new processes  • demonstrates the ability to self source information  • actively seeks out opportunities to increase knowledge and learn new skills, and applies kills appropriately  • is solution focused, applies a structured approach to problem solving and uses appropriesolve issues.  Self Assessments	es newly gained
Manager's Comments	Patings
	Rating:
Being Accountable  Takes ownership for quality of work.  • takes responsibility for own workload and appreciates how own behaviour impacts up  • is reliable, self-disciplined and proactive  • readily accepts feedback on performance and applies feedback on the job  • manages time effectively to ensure delivery of the best possible service  • maintains a strong client focus through periods of change and a positive attitude wher changes  • exercises good judgment and bases all decision on reasoned analysis  • thinks about what could go wrong and effectively manages as it relates to risk  • consistently produces high quality work.  Self Assessment:	
Manager's Comment:	Rating:

# **Success Factors**

# **Public Service Integrity**

Is committed to serving the people of New Zealand with honesty and integrity.

- · communicates openly and honestly with others
- inspires trust in others, and behaves fairly and ethically at all times
- respects the confidentiality of client and Ministry information
- demonstrates and applies an understanding of the Ministry's vision, purpose and values
- · adheres to the Ministry's Code of Conduct
- · models the highest standards of public service behaviour and probity
- always acts to enhance the Ministry's reputation.

# **Self Assessment:**

Manager's Comment:

Rating

# Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor,

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

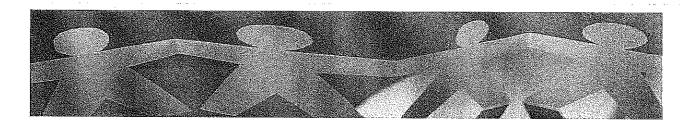
Key Successes and Highlights			
Self:		$\bigvee$ $\bigwedge$	
, <	1/12		
	)) <sup>v</sup> ~(		
		77.	
		>	 
Manager's:	$()) \rangle$		
Overall Rating Achieved:			
$((\ ))^{\vee}$			

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development  On the job development/ assistance required  Knowledge and Skills required to perform role  Tools required to perform role  Development/Assistance towards Future Goals	Link to:  Key Deliverable  Success Factor  Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
			·	

coaching notes



# Performance Development and Assessment System

Staff Member's Name:			
Position:	Executive Ad	ministrator Con	tact Centre
Manager's Name:			
Review Period:	to		
Employees Comments:			
Managers Comments:			
Date Key Deliverables ag	reed:		
(Manager)		(Staff Member)	
Date Performance Review	w Completed:		
Performance Review Agr (Refer to page 23 of the g			Yes / No
(Manager)		(Staff Member)	· .
Overall rating:			

# Key Deliverables - refer page 8 of guidelines

# Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

#### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### Expectation Achieved

Key deliverable and agreed measure(s) met.

#### Exceeded Expectation

Exceeded the key deliverable and measure(s).

# Staff Management

Manage the contact centre Support Officer, ensuring all management responsibilities are completed and support them to achieve their objectives. This includes:

- · performance management and reviews
- personnel documentation is up-to-date, complete, and stored appropriately
- complying with all staff management legislation, policies, and procedure

# Self Assessment:

Manager's Com	ımeni	Ľ:
---------------	-------	----

# Rating:

# Secretarial and Administrative Support

Provide a high standard and timely delivery of secretarial and administrative support to the contact centre, in line with Ministry policy and standards and required timeframes, to ensure the effective running of the office. This includes:

- providing full support to the Contact Centre Manager and management team, for example:
  - writing or completing documents and reports, meeting minutes and notes
  - ensuring all records and files (electronic and hard copy) are appropriately stored, readily retrieved, accurate and up-to-date, and are stored securely where necessary
- providing building card administrator services (where applicable)
- organising the logistics of meetings and planning days, and coordinating any required materials, catering, and other support requirements
- ensures building repairs/maintenance are completed with required timeframes
- ensuring that site equipment is operational and maintained at all times.

Self Assessment:	
Manager's Comment:	ating:
	^ ^
Finance	
Take responsibility for financial administration for the contact centre	and deliver an
accurate service, according the Ministry and financial standards, to m	eet specified
timeframes and the needs of the Financial Analyst. This includes:	
<ul> <li>updating forecast and advising CCM/FA as and when required</li> </ul>	
updating administration costs for annual budget	
updating and maintaining salary calculator it applicable?	
<ul> <li>completing requisitions (1 day = non urgent, 2 hours = urgent), reports, ass and journals</li> </ul>	sets stock take, accruais
maintaining petty cash records (it applicable)	
Self Assessment:	
Manager's Comment;	ating:

# **Human Resources**

Take responsibility for human resource administration for the contact centre and deliver an accurate service, according the Ministry and HR standards, to meet specified timeframes and needs of the relevant HR team. This includes:

- completing checking and audits as required e.g.;
  - Payroll (weekly and monthly)
  - o GAS reports checked and signed off (fortnightly)
  - o personnel files checks (quarterly and bi-annually)

- Global administrator (where applicable)
- internal controls checks completed (monthly)
- completing recruitment and Payroll related documentation as necessary
- entering performance appraisal results, checking spreadsheets, and validating data to ensure it is correct
- ensuring personnel files are opened, maintained, closed, and stored appropriately
- completing reports and information requests as required.

Self Assessment:	
Manager's Comment:	Rating:

# To contribute to projects, or elements of a project, to support the contact centre as required, and meeting the project requirements such as timeframes, key deliverables, quality outcome. For example: • contributing to the development of the contact centre plan. • participating in a project team Self Assessment: Rating:

ADDITIONAL KEY DELIVERABLE	
use this section to record any additional result areas or projec  What is to be achieved:  • • • •	is you have been responsible for during the year.
Self Assessment:	
Manager's Comment:	Rating:

# Success Factors - refer to page 11 of guidelines

# Ratings:

# **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

# Competent

Demonstrates the appropriate behaviours.

# Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others

# People Skills Demonstrates strong interpersonal skills. • is confident when working with clients and colleagues • treats all people with dignity and respect • demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others • demonstrates the ability to work positively with others to achieve outcomes • stays calm, objective, and positive during difficult situations • demonstrates the ability to resolve conflicts. Self Assessment: Rating:

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language is able to simplify complex issues when required questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation
Self Assessment:
Manager's Comment:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wider team  identifies, develops and uses both internal and external networks that add value or provide opportunities  works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while successfully representing the Ministry  Self Assessment:

Manager's Comment:

Rating:

Maximising Knowledge and Application  Uses all resources available in order to deliver successful outcomes.  • keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others  • coaches colleagues through errors to ensure that future mistakes are avoided  • understands and applies all relevant policies, guidelines and standards  • positively supports and accepts new processes  • demonstrates the ability to self source information  • actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately  • is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues		
Self Assessment:		
Manager's Comment:	ating:	
Being Accountable  Takes ownership for quality of work.  takes responsibility for dwn workload and appreciates how own behaviour impairs reliable, self-disciplined and proactive.  readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service.  maintains a strong client focus through periods of change and a positive attitud changes.  exercises good judgment and bases all decision on reasoned analysis.  thinks about what could go wrong and effectively manages as it relates to risk.  consistently produces high quality work.  Self Assessment:		
Manager's Comment:	ating:	

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose and values adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation
Self Assessment:
Manager's Comment:
Optionals:
Training and Facilitation  (please note this success factor soptional not applicable to all roles)  implements a structured planning framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate
Self Assessment:
Manager's Comment: Rating:

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ not develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities</li> <li>develops and maintains key relationships to ensure ongoing business.</li> </ul>	,
Self Assessment:	
Manager's Comment:	Rating:
	Y
Leading People  (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback or  is aware of individuals strengths and uses them as a basis for building capa  encourages a challenging environment where people are motivated to do the  considering work life balance  leads and develops effective teams to maximise the contributions of member  outcomes  provides a healthy and safe work environment for their team(s) including co-  safety scheduler tasks	ability eir best, while also ers to achieve successful
Self Assessment	
Manager's Comment:	Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# Exceeding Expectations

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated

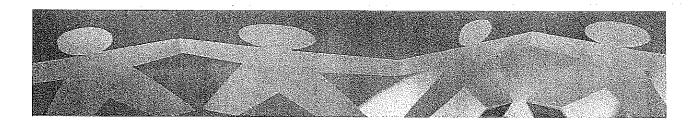
Key Successes and Highlights:	
Self:	
Manager's:	
	:
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
	Key Deliverable     Success Factor	Key Deliverable     Success Factor     responsibilities	Key Deliverable     Success Factor     Responsibilities     By When?

coaching notes



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Contracts Processing Officer	
Manager's Name:		
Review Period: to		
Employees Comments:		
Managers Comments.		
Date Key Deliverables ag	greed:	
(Manager)	(Staff Member)	VYSS RALL DOCK
Date Performance Revie	w Completed:	
Performance Review Ag (Refer to page 23 of the		Yes / No
(Manager)	(Staff Member)	
Overall rating:		

# Key Deliverables - refer page 8 of guidelines

# Ratings:

# Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

# **Expectation Achieved**

Key deliverable and agreed measure(s) met.

# **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

PR	ROCESSING		
<u> </u>			
, war	provides technical processing advice and expertise to internal business un	it staff managers	
<b>@</b>	contributes to the development of innovative enhancements and changes to processing and procedures being made	that result in improvements	
8	provides a full range of processing functions for the contracts team as well services centres	as Work and Income	
•	provides a centralised contact point for queries		
Self Assessment:			
Ma	nager's Comment:	Rating:	

# SERVICE EXCELLENCE

# Timeliness

- assesses and processes invoices and data accurately and within agreed timeframes
- · meets and maintains the team's timeframe standards
- · provides accurate and timely reporting to staff and the regional contracts manager
- \responds to all requests within the required timeframes
- ensures that reports due from providers are not more that 4 weeks outstanding

# Self Assessment:

Manager's Comment:	Rating:
Accuracy     ensures that all client information from the providers is processed correctly or omissions	and work is free from errors
<ul> <li>processes all enterprise allowance applications correctly on SOLO and ensor or omissions</li> </ul>	sures work is free from errors
<ul> <li>adheres to systems in place to minimise risk and security breaches</li> </ul>	a a
<ul> <li>completes all processing to required departmental standards and in line with procedures</li> </ul>	th departmental policies and
meets all reporting and monitoring requirements	
Self Assessment:	
	>
Manager's Comment:	Rating:
SERVICE EXCELLENCE	
Client satisfaction     maintains service excellence standards as per the service excellence stand	ards guidelines
Self Assessment:	
Manager's Comment:	Rating:

ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or projects you ha	ave been responsible for during the year
What is to be achieved:	
• •	
Self Assessment:	
Manager's Comment:	Ratings
ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or projects you had	ve deen responsible for during the year
What is to be achieved:	
Self Assessment:	
Manager's Comment:	Rating:

# Success Factors - refer to page 11 of guidelines

# Ratings:

# Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

#### Competent

Demonstrates the appropriate behaviours.

# Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills Demonstrates strong interpersonal skills. is confident when working with clients and colleagues treats all people with dignity and respect demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others demonstrates the ability to work positively with others to achieve outcomes stays calm, objective, and positive during difficult situations demonstrates the ability to resolve conflicts. Self Assessment: Rating:

<ul> <li>Communication Skills</li> <li>Communicates clearly and fluently across all forms of communication.</li> <li>tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>		
Self Assessment:		
Manager's Comment:	Rating:	
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra microssisting others as necessary for the benefit identifies, develops and uses both internal and external networks that add vivorks in partnership with internal and external contacts where appropriate, i and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while the Ministry.	alue or provide opportunities n order to maximise services	
Self Assessment:		
Manager's Comment:	Rating:	

# Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes. • keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others coaches colleagues through errors to ensure that future mistakes are avoided · understands and applies all relevant policies, guidelines and standards positively supports and accepts new processes demonstrates the ability to self source information actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues Self Assessment: Manager's Comment: Being Accountable Takes ownership for quality of wor · takes responsibility for dwn workload and appreciates how own behaviour impacts upon others is reliable, self-disciplined and proactive) readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service maintains a strong client floors through periods of change and a positive attitude when working with changes exercises good judgment and bases all decision on reasoned analysis thinks about what could go wrong and effectively manages as it relates to risk consistently produces high quality work Self Assessment:

Manager's Comment:

Rating:

Public Service Integrity	
Is committed to serving the people of New Zealand with honesty and integrity communicates openly and honestly with others	<i>'</i> .
<ul> <li>Inspires trust in others, and behaves fairly and ethically at all times</li> </ul>	
<ul> <li>respects the confidentiality of client and Ministry information</li> <li>demonstrates and applies an understanding of the Ministry's vision, purposed adheres to the Ministry's Code of Code</li></ul>	se and values
<ul> <li>adheres to the Ministry's Code of Conduct</li> <li>models the highest standards of public service behaviour and probity</li> </ul>	se and values
always acts to enhance the Ministry's reputation	
Self Assessment:	
	$\Omega_{\bullet}$ $\Omega$
Manager's Comment:	Rating
	Raung:
	$(\bigcirc)$
Optionals:	
Training and Facilitation	
(please note this success factories optional not applicable to all roles)	
centre/region centre/region demander of the training demander of the tr	
<ul> <li>uses an appropriate variety of delivery methods to effectively facilitate learn</li> <li>ensures staff or clients are given the opportunities and necessary support to</li> </ul>	ing
rearming/esteptity / / / /	
<ul> <li>applies an understanding of adult learning principles and adult learning style</li> <li>evaluates whether the transfer of learning has occurred</li> </ul>	es
undertakes internal marketing of training opportunities where appropriate	
Self Assessment:	
Manager's Comment:	Dating
	Rating:

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities and maintains key relationships to ensure ongoing business.</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
Leading People  (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback o  is aware of individuals' strengths and uses them as a basis for building cap  encourages a challenging environment where people are motivated to do to  considering work life balance  leads and develops effective teams to maximise the contributions of memboutcomes  provides a healthy and safe work environment for their team(s) including considering sometiment tasks	eability heir best, while also ers to achieve successful
Self Assessment:	
Manager's Comment:	Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

# **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

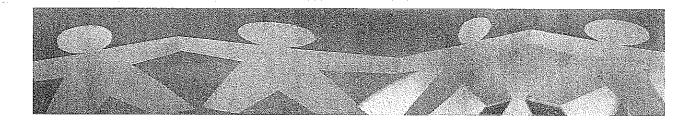
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  Key Deliverable  Success Factor  Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
				5
		O BANIC	~	
		·		
Attach coaching notes			· —	



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Contact Centre Trainer	
Manager's Name:		
Review Period:	to	
Employees Comments:		
Managers Comments:		
Date Key Deliverables ag	reed:	
(Manager)	(Staff Men	nber)
Date Performance Reviev	v Completed:	
Performance Review Agr (Refer to page 23 of the g		Yes / No
(Manager)	(Staff Men	nber)
Overall rating:		

# Key Deliverables - refer page 8 of guideline.

# Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

# **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

# Facilitation of site training activities

Assists Training manager to co-ordinate, deliver and report on site training activities in accordance with timeframes set and to a quality standard. These activities will support and improve individual and site performance. Activities include:

- Co-ordinating, managing and delivering site training plans, including identification of resources, timing of events and reporting on milestones
- Providing information and feedback to the Contact Centre Training Manager on planned and completed training activities
- Contributing to the planning and organising of site training programmes and activities
- Facilitation of skill checks to indicate trainees understanding and application of training activities completed
- Applies an understanding of adult learning principles and styles and uses an appropriate variety of delivery methods to effectively facilitate learning

variety of delivery methods to effectively facilitate learning	,
Self Assessment:	
Manager's Comment:	Rating:
	-
Maintenance of Resources	

Site training resources are reviewed, updated and relevant to the needs of the Contact Centre. Activities include:

- Reviewing training materials to ensure that they remain relevant and technically correct and builds scenarios / exercises that help reinforce the training and support delivery.
- Ensuring that training databases are renewed prior to each training event and maintains training files, records and other information of staff and candidates progress.
- Monitoring and maintaining training bases to ensure information is up to date and the integrity of the system is maintained.

# Self Assessment:

Manager's Comment:	Rating:
Capability development	
Supports Contact Centre Training Manager to raise individual results in performance improvement. Activities include:  Promoting training activities, opportunities and awareness to sworkforce	
<ul> <li>Proactively identifies areas of development for staff and contributed development of strategies and materials for improving perform</li> <li>Maintaining data bases that record Customer Service Representation</li> </ul>	nance and obality \
Self Assessment:	
Manager's Comment:	Rating:
Project Delivery	
Supports the Contact Centre Training Managerwith the training project work, in line with the required timeframes, standards accurate information it provided to staff and project deliverable training on new technologies  • new technologies  • business applications  • other planned activities as specified	ng delivery aspects of key and techniques to ensure bles are met. This includes
Self Assessment:	

Manager's Comment:	Rating:
Qualification and assessment	Witte Skill State
Assists the Contact Centre Training Manager to deli activities in accordance with required standards. En requirements within training Agreement timeframes  Ensuring 80% of staff enrolled in a qualification prog  Delivering qualification workshops in accordance with Operations team  Liaising with Operations Team to organise catch up  Liaising with Service Managers regarding candidates. Providing support and coaching for candidates composite Attending Learning State forum in compliance with remaining on-going development for assessment.  Working with regional and national assessors to ensure the content of the conte	nsures candidates complete  This includes:  gramme complete the qualification th scheduled times allocated by the sessions where needed for staff s progress pleting qualifications edistration requirements and peer moderation as required
Manager's Comment:	Rating:

# National level contribution

Contributes and supports training and development of national initiatives in order to support capability development, performance improvement across the national contact centre operation and delivery of the Work & Income and Contact Centre Strategic Plan. This includes:

- contributing positively to national consultation, planning, and decision making processes for training.
- assisting with the preparation of national training materials

8	undertaking networking with other contact centre sites, and sharing knowledge and		
65	experience supporting implementation of the contact centre stra strategic development of the contact centre	ategic plan and contributing to the overall	
Se	If Assessment:		
Ma	nager's Comment:	Rating:	
			>
AD use	DITIONAL KEY DELIVERABLE this section to record any additional result areas or projects you	have been responsible for during the year	
Wh	nat is to be achieved:		12,434
Se	If Assessment:		
		·	
Ма	nager's Comment:	Rating:	
(			

# Success Factors - refer to page 11 of guidelines

### Ratings:

### Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

### Competent

Demonstrates the appropriate behaviours.

### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills Demonstrates strong interpersonal skills. • is confident when working with clients and colleagues • treats all people with dignity and respect • demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others • demonstrates the ability to work positively with others to achieve odcomes • stays calm, objective, and positive during difficult situations • demonstrates the ability to resolve conflicts. Self Assessment: Rating:

<ul> <li>Communication Skills</li> <li>Communicates clearly and fluently across all forms of communication.</li> <li>tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>
Self Assessment:
Manager's Comment:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information participates as a positive team internet in all working relationships willingness to go the extra nile assisting others as necessary for the benefit of the wider team identifies, develops and uses both internal and external networks that add value or provide opportunities works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication has the respect of others and is a positive role model contributes towards a positive working environment understanding the values needs and aspirations of potential partners while successfully representing the Ministry.
Self Assessment:

Manager's Comment:

Rating:

### Maximising Knowledge and Application

Uses all resources available in order to deliver successful outcomes.

- keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others
- coaches colleagues through errors to ensure that future mistakes are avoided
- · understands and applies all relevant policies, guidelines and standards
- positively supports and accepts new processes
- demonstrates the ability to self source information
- actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately
- is solution focused, applies a strategic approach to problem solving and uses appropriate techniques to resolve issues

Self Assessment:	
Manager's Comment:	Rating:
Being Accountable  Takes ownership for quality of work.  takes responsibility for own workload and appreciates how own behaviour in is reliable, self-disciplined and proactive.  readily accepts feedback on performance and applies feedback on the job manages fine effectively to ensure delivery of the best possible service.  maintains a strong client focus through periods of change and a positive attriction of change and a positive attriction of change and analysis.  exercises good judgment and bases all decision on reasoned analysis.  thinks about what could go wrong and effectively manages as it relates to rise consistently produces high quality work.  Self Assessment:	tude when working with
Manager's Comment:	Datings
manager a Comment.	Rating:
1	

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose and values adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation			
Self Assessment:			
Manager's Comment:			
Optionals:			
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planning framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate			
Self Assessment:			
Manager's Comment: Rating:			

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all romarkets and promotes products and services to external partie</li> <li>identifies and prioritises areas of need (focusing on disadvanta base), and develops a plan around delivery of marketing activite</li> <li>targets marketing activities to where greatest opportunities exist effectively negotiates with internal and external parties to maximour clients</li> <li>develops and maintains key relationships to ensure ongoing but</li> </ul>	s ged client/ non-client ies st mise opportunities for
Self Assessment:	
Manager's Comment:	Rating:
Leading People  (applies only to people with staff management responsibilities)  • provides leadership by creating a core sense of purpose and vision  • identifies difficult issues and opportunities and manages these proactively  • clearly communicates expectations and provides coaching and feedback or  • is aware of individuals' strengths and uses them as a basis for building caps  • encourages a challenging environment where people are motivated to do the considering work life balance  • leads and develops effective teams to maximise the contributions of member outcomes  • provides a healthy and safe work environment for their team(s) including consafety scheduler tasks	ability reir best, while also ers to achieve successful
Manager's Comment:	Rating:

### Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

### Outstanding

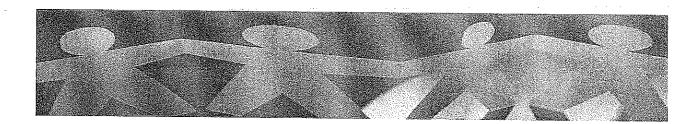
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

Key Successes and Highlights:	
ney successes and migmigms.	
Self:	
	O My
Manager's:	
Manager s.	
	$\triangleright$
Overall Rating Achieved:	

### Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  Key Deliverable  Success Factor  Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
1				
Attach coaching notes				



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Training Manager Contact Cer	ntre
Manager's Name:		
Review Period:	to	
Employees Comments:		7
Managers Comments		
Date Key Deliverables ag	reed:	
(Manager)	(Staff Member)	
Date Performance Review	v Completed:	
Performance Review Agreed: (Refer to page 23 of the guidelines)		Yes / No
(Manager)	(Staff Member)	
Overall rating:		

### Key Deliverables - refer page 8 of guidelines

### Ratings:

### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

### Exceeded Expectation

Exceeded the key deliverable and measure(s).

### Management of site training activities

Site training activities are managed, delivered and reported on in accordance with timeframes set and to a quality standard. These activities will support and improve individual and site performance. Activities include:

- Co-ordinating, managing and delivering site training plans, including identification of resources, timing
  of events and reporting on milestones.
- Providing information and advice to the Contact Centre management team on planned and completed training activities, ensuring planned impacts are included within wider contact centre planning processes.
- Contributing to the site management, by participating in team planking and decision making

providing day-to-day support, coaching, and goldance to the Contact Centre the Contact Centre Manager	re Trainer and feedback to
Self Assessment:	
Manager's Comment:	Rating:

# Capability development

Proactively raises individual and site capability that results in performance improvement. Activities include:

- monitoring issues and trends in the site, then developing and implementing a plan to address needs
- oversight of reporting and data capture relating to Customer Service Representative capability and development
- identifying areas of development and develops strategies and materials for improving performance and quality
- ensuring site resources are regularly updated and accurate
- demonstrating leadership at a management team level in capability and performance development of staff e.g. Capability Coaches
- promoting training and coaching activities within the site, developing awareness and commitment to the development of a capable workforce

Self Assessment:		
Manager's Comment:	Rating:	
		$ \wedge$
Project Delivery		(P)
Manages the training delivery aspects of key project we timeframes, standards, and techniques to ensure accur and project deliverables are met. This includes training	rate information is brould	ed to staff
<ul><li>new technologies</li><li>business applications</li></ul>	$\langle \langle \rangle \rangle$	
other planned activities as specified		
Self Assessment:		
Manager's Comment	Rating:	

# Qualification and assessment

Delivers qualification and assessment activities in accordance with required standards. Ensures candidates complete requirements within training Agreement timeframes. This includes:

- Ensuring 80% of staff enrolled in a qualification programme complete the qualification
- Delivering qualification workshops in accordance with scheduled times allocated by the Operations team
- Liaising with Operations Team to organise catch up sessions where needed for staff
- Maintaining database record of candidates progress
- Maintain and update resources as required to support the qualification programme

- Liaising with Service Managers regarding candidates progress
   Providing support and coaching for candidates completing qualifications
   Attending Learning State forum in compliance with registration requirements
- Maintaining on-going development for assessment and peer moderation as required
- Working with regional and national assessors to ensure consistency

and matterial and matterial	assessors to ensure consistency
Self Assessment:	
Manager's Comment:	Rating

# National level contribution

Contributes and supports training and development of national initiatives in order to support capability development, performance improvement across the national contact centre operation and delivery of the Work & Income and Contact Centre Strategic Plan. This includes:

- contributing positively to national consultation, planning, and decision making processes for training.
- · assisting with the preparation of national training materials
- undertaking national training design and development work
- · undertaking notworking with other contact centre sites, and sharing knowledge and experience
- supporting implementation of the contact centre strategic plan and contributes to the overall strategic development of the contact centre

Self Assessment:	
Manager's Comment:	Rating:

### ADDITIONAL KEY DELIVERABLE

use this section to record any additional result areas or projects you have been responsible for during the year

What is to be achieved:	
•	
6	
e	
œ	
·	
Self Assessment:	
Manager's Comment:	Day Co
	rating:
	Miller
	54

# Ratings:

### Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

### Competent

Demonstrates the appropriate behaviours.

### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

People Skills	
Demonstrates strong interpersonal skills.	
<ul> <li>is confident when working with clients and colleagues</li> </ul>	
treats all people with dignity and respect	
<ul> <li>demonstrates an understanding of the views, beliefs, cultural perspectives others</li> </ul>	
demonstrates the ability to work positively with others to achieve outcomes     stays calm objective.	
stays call, objective, and positive during difficult situations	
demonstrates the ability to resolve conflicts.	
	$((\ ))$
Self Assessment:	$\triangleright$
	•
Manager's Comment:	
	Rating:
	•
	į

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language is able to simplify complex issues when required questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation
Self Assessment:
Manager's Comment:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wider team  identifies, develops and uses both internal and external networks that add value or provide opportunities  works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values needs and aspirations of potential partners while successfully representing the Ministry
Self Assessment:

Manager's Comment:

Rating:

### Maximising Knowledge and Application

Uses all resources available in order to deliver successful outcomes.

- keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others
- coaches colleagues through errors to ensure that future mistakes are avoided
- understands and applies all relevant policies, guidelines and standards
- positively supports and accepts new processes
- demonstrates the ability to self source information
- actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately
- is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues

resolve issues	^ ^
Self Assessment:	
Manager's Comment:	Rating:
Being Accountable  Takes ownership for quality of work  takes responsibility for own workload and appreciates how own behaviour in is reliable, self-disciplined and proactive  readily accepts feesback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service  maintains a strong client focus through periods of change and a positive attickanges  exercises good judgment and bases all decision on reasoned analysis  thinks about what could go wrong and effectively manages as it relates to rise consistently produces high quality work	tude when working with
Self Assessment:	
Manager's Comment:	Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others  inspires trust in others, and behaves fairly and ethically at all times  respects the confidentiality of client and Ministry information  demonstrates and applies an understanding of the Ministry's vision, purpose and values  adheres to the Ministry's Code of Conduct  models the highest standards of public service behaviour and probity  always acts to enhance the Ministry's reputation		
Self Assessment:		
Manager's Comment:	Rating	
Optionals:		
Training and Facilitation  implements a structured planning framework that meets the training demands of the contact centre  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or ckerts are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  updertakes internal marketing of training opportunities where appropriate		
Self Assessment:		
Manager's Comment:	Rating:	

### Marketing and Negotiation

(please note this success factor is optional not applicable to all roles)

- markets and promotes products and services to external parties
- identifies and prioritises areas of need (focusing on disadvantaged client/ non-client base), and develops a plan around delivery of marketing activities
- targets marketing activities to where greatest opportunities exist
- · effectively negotiates with internal and external parties to maximise opportunities for our clients
- develops and maintains key relationships to ensure ongoing business.

Self Assessment:

Manager's Comment:

Rating

### Leading People and change leadership

- provides leadership by creating a core sense of purpose and vision
- . identifies difficult issues and opportunities and manages these proactively
- clearly communicates expectations and provides coaching and feedback on performance
- . is aware of individuals' strengths and uses them as a basis for building capability
- encourages a challenging environment where people are motivated to do their best, while also considering work life balance
- leads and develops effective teams to maximise the contributions of members to achieve successful outcomes
- provides a healthy and safe work environment for their team(s) including completion of the health and safety school are tasks
- · role models leadership qualities across site, community and/or government sector
- thinks at a high level in terms of strategy, trends and patterns
- · brings change initiatives into the site, understanding the change and setting clear expectations
- looks for the best long-term outcomes and is able to make difficult decisions when needed
- · teams up with others to obtain the best results
- works across a broad base and seeks buy-in from a number of groups to develop and implement plans

Self Assessment:

Manager's Comment:	Rating:

### Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

### Outstanding

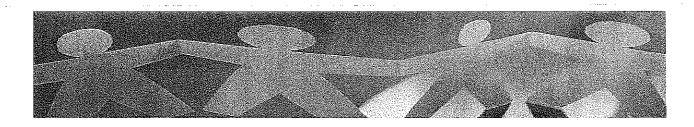
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Link to:  Key Deliverable  Success Factor  Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
	O BANTIN		
	Key Deliverable     Success Factor	Key Deliverable     Success Factor     responsibilities	Key Deliverable responsibilities By When?     Success Factor



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Intensive Client Support Mana	ger
Manager's Name:		
Review Period:		
Employees Comments:		
Managers Comments:		
Date Key Deliverables ag	reed:	
(Manager)	· ·	(Staff Member)
Date Performance Review	/ Completed:	
Performance Review Agr (Refer to page 23 of the g		Yes / No
(Manager)	<del></del>	(Staff Member)
Overall rating:		

## Key Deliverables - refer page 8 of guidelines

### Ratings:

### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

### Exceeded Expectation

Exceeded the key deliverable and measure(s).

Key Deliverables			
Participation in Business Practices  actively and appropriately participates in new initiatives in the business promotes online and other self-service channels to clients and influences affects to use these services contributes positively to the successful implementation of national, regional and site strategies			
Self Assessment:			
Manager's Comment:	Rating:		
Client Development Activities  develops and implements comprehensive employment plans for clients that demonstrate a clear link between assessment, selected intervention, outcomes to be achieved and in consultation with appropriate stateholders  identifies risks related to the client's case and manages risk in accordance with Ministry policy and practices  plans are requirely reviewed and kept current to reflect the clients current needs/circumstances  the proportion of clients with current work obligations that have a completed RecruitMe profile will be between 95-109%  makes appropriate referrals to other agencies  contributes to the successful implementation of national and regional strategies, contributing positively to regional performance			
Manager's Comment:	Rating:		

### Key Deliverables

### **Client Outcomes**

Takes an active approach to client engagement which supports Work and Income's and the Government's performance targets:

- clients receive the right level of support and are committed to achieving goals
- develops and implements comprehensive in work support plans to support client's sustainable independence
- refers clients to the Employer Services team for profiling
- ensures effective transition of clients from ICS to sustainable employment
- clients are independent and self-reliant and have improved social health, education and employment

outcomes as a result of the employment plan and the ICSM contribution	, education and employment
Self Assessment:	
Manager's Comment:	Rating:
Relationship Management/Networking  develops and maintains effective links with a range of other people and act built on interagency collaboration  identifies and engages with appropriate stakeholders in developing and de work collaboratively with community and government agencies to prove contribute to the successful outcomes for the client  on going liaison and exchange of information with other agencies in responsitional processes, and any changes that occur.  Self Assessment:	livering plans ide joined up solutions that
Manager's Comment:	Rating:

Key Deliverables		
<ul> <li>supports the site to achieve service excellence standards:         <ul> <li>90% of all benefit entitlement assessments in the service centre are completed within 5 days of receipt.</li> </ul> </li> <li>clients outcomes as contained in the client's employment plan are achieved within agreed timeliness</li> <li>all mandatory processes for recording client information is completed in the required time frame referrals to other agencies/service providers are made in a timely manner</li> </ul>		
Self Assessment:		
Manager's Comment:	Rating	
Accuracy Supports the site to achieve service excellence standards 90% of all client entitlements are correctly identified and processed 90% of RecruitMe profiles are in accordance with accepted quality standar. The proportion of hardship assistance grants that meet the eligibility criteria reports meet expected quality standards maintains complete, concise and up to date client records and ensures all consent forms are completed within agreed timefrances and to agreed qual information in the engagement application tool is complete and accurate  Self Assessment:	a will be between 95-100%	
Manager's Comment:	Rating:	
Service Quality Makes individual contribution to service quality by:  maintaining excellent service in line with the national service standards  Self Assessment:		
Manager's Comment:	Rating:	

# Success Factors - refer to page 11 of guidelines

### Ratings:

### **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

### Competent

Demonstrates the appropriate behaviours.

### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

	$-\Delta$			
Success Factors				
People Skills  Demonstrates strong interpersonal skills.  is confident when working with clients and colleagues  treats all people with dignity and respect  demonstrates an understanding of the views, beliefs, cultural perspectives others  demonstrates the ability to work positively with others to achieve outcomes  stays calm, objective, and positive during difficult situations  demonstrates the ability to resolve conflicts				
Self Assessment:				
Manager's Comment:	Rating:			
Communication Skills  Communicates clearly and muently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources  communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language  is able to simplify complex issues when required  are strong in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation				
Self Assessment:				
Manager's Comment:	Rating:			

# Success Factors Partnerships and Relationship Management Builds a network of contacts both within and beyond Work and Income seeks opportunities to collaborate and share information participates as a positive team member in all working relationships willingness to go the extra mile assisting others as necessary for the benefit of the wider team identifies, develops and uses both internal and external networks that add value or provide opportunities works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication has the respect of others and is a positive role model contributes towards a positive working and environment understanding the values, needs and aspirations of potential partners while successfully representing the Ministry Self Assessment: Manager's Comment: Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes. • keeps knowledge of relevant business զուծաբ specific and MSD products and services up to date and shares this knowledge with others coaches colleagues through errors to ensure that future mistakes are avoided understands and applies all relevant policies, guidelines and standards positively supports and accepts new processes demonstrates the ability to self source information actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately is solution focused applies a structured approach to problem solving and uses appropriate techniques to resolve igsues Self Assessment: Manager's Comment: Rating:

### **Being Accountable**

Takes ownership for quality of work.

- takes responsibility for own workload and appreciates how own behaviour impacts upon others
- is reliable, self-disciplined and proactive
- · readily accepts feedback on performance and applies feedback on the job
- · manages time effectively to ensure delivery of the best possible service
- maintains a strong client focus through periods of change and a positive attitude when working with changes
- exercises good judgment and bases all decision on reasoned analysis
- · thinks about what could go wrong and effectively manages as it relates to risk

consistently produces high quality work	
Self Assessment:	
Manager's Comment:	Rating:
Public Service Integrity Is committed to serving the people of Wew Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation  Self Assessment:	e and values
Manager's Comment:	Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

### Outstanding

Exceeds all key
deliverables and all
success factors are
'Strength'. Is considered
a role model in both what
is achieved and success
factors demonstrated.

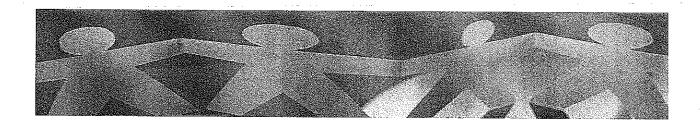
Key Successes and Highlights	
Self:	
Manager's:	
Overall Rating Achieved:	
10	

# Individual Development Plan - refer to page 13 of the guidelines

coaching notes

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Health and Disability Coordina	tor
Manager's Name:		
Review Period: to		
Employees Comments:		
Managers Comments		
Date Key Deliverables ag	reed:	
(Manager)	(Staff Member)	
Date Performance Review	/ Completed:	
Performance Review Agro (Refer to page 23 of the g	eed: uidelines)	Yes / No
(Manager)	(Staff Member)	
Overall rating:		

# Key Deliverables - refer page 8 of guidelines

### Ratings:

### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

### Exceeded Expectation

Exceeded the key deliverable and measure(s).

# SERVICE EXCELLENCE

### Client satisfaction

- Provides support to health practitioners and disability service providers
- Planned, scheduled and agreed contact is made with health practitioners and disability service providers

i .	providers	
•	Relevant health practitioners and disability service providers are satisfied service provided	
•	Keeps up-to-date and makes contact with new health practitioners and disability service providers in region	
•	Identifies issues raised by health practitioners and disability service provisolutions or escalates to manager as appropriate	sers and proactively looks for
•	Ensure up-to-date Work and Income publications and forms are available at health and disability service providers	
	Uses initiative to influence change and improve Work and income process	es where appropriate.
Self Assessment:		
	nager's Comment:	Rating:
Tin	neliness	
• (Phone calls, emails and requests for assistance both internal and external are responded to within 24 hours		
• (	hours	al are responded to within 24
•	Spreadsheet is maintained up to date and issues are fully documented	al are responded to within 24
	nodio .	al are responded to within 24

Manager's Comment:	Rating:	
Provider liaison		
<ul> <li>Work and Income products and services are promoted through regular meetings with health practitioners and disability service providers resulting in better business relationships</li> <li>Takes initiative to increase the profile of HDC health practitioners and disability service providers</li> <li>Joint presentations are arranged with other relevant health practitioners and disability service providers</li> <li>Identify and target appropriate health practitioners and disability service providers in order to built networks.</li> </ul>		
Self Assessment:		
Manager's Comment:	Rating:	
Specialist knowledge		
• Full application and use of legislation and policy in relation to client entitiem	nent	
<ul> <li>Keeps up to date with current issues/research in the health and disability fi</li> </ul>		
Self Assessment		
Manager's Comment:	Rating:	

ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or projects	VOU have been responsible for during the year
What is to be achieved:	, and the open size for carring the year.
•	
•	
e	
Self Assessment:	
Manager's Comment:	Rating
_	
ADDITIONAL KEY DELIVERABLE	
use this section to record any additional result areas or projects	you have been responsible for during the year
What is to be achieved:	
Self Assessment:	
Manager's Comment:	Rating:
·	

# Success Factors – refer to page 11 of guidelines

### Ratings:

### **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

### Competent

Demonstrates the appropriate behaviours.

### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills

Demonstrates strong interpersonal skills.

- is confident when working with clients and colleagues
- treats all people with dignity and respect
- netrates an understanding of the views, heliefs, cultural nerspection

others	Derspectives and inclividual differences in
• demonstrates the ability to work positively with others to achie	ve outcomes ( )
<ul> <li>stays calm, objective, and positive during difficult situations</li> </ul>	
<ul> <li>demonstrates the ability to resolve conflicts.</li> </ul>	
Self Assessment:	77.
Manager's Comment	Rating:
	1

Communication Skills  Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources  communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language  is able to simplify complex issues when required  questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation		
Self Assessment:		
Manager's Comment:	Ratings	
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wider team  identifies, develops and uses both internal and external networks that add value or provide opportunities  works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while successfully representing the Ministry		
Self Assessment:		
Manager's Comment:	Rating:	

# Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes. • keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others coaches colleagues through errors to ensure that future mistakes are avoided understands and applies all relevant policies, guidelines and standards positively supports and accepts new processes demonstrates the ability to self source information actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues Self Assessment: Manager's Comment: Ratina: Being Accountable Takes ownership for quality of work. takes responsibility for own workload and appreciates how own behaviour impacts upon others is reliable, self-disciplined and proactive readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service maintains a strong check focus through periods of change and a positive attitude when working with changes> exercises good judgment and bases all decision on reasoned analysis thinks about what could go wrong and effectively manages as it relates to risk consistently produces high quality work Self Assessment: Manager's Comment: Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others  inspires trust in others, and behaves fairly and ethically at all times  respects the confidentiality of client and Ministry information  demonstrates and applies an understanding of the Ministry's vision, purpose and values  adheres to the Ministry's Code of Conduct  models the highest standards of public service behaviour and probity  always acts to enhance the Ministry's reputation		
Self Assessment:		
Manager's Comment:		
Optionals:		
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planning framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate		
Self Assessment:		
Manager's Comment: Rating:		

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ non-client base), and develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities for our clients</li> <li>develops and maintains key relationships to ensure ongoing business.</li> </ul>
Self Assessment:
Manager's Comment:
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and apportunities and manages these proactively  clearly communicates expectations and provides exacting and feedback on performance  is aware of individuals strengths and uses them as a basis for building capability  encourages a challenging environment where people are motivated to do their best, while also considering work life balance  leads and develops effective teams to maximise the contributions of members to achieve successful outcomes  provides a healthy and sale work environment for their team(s) including completion of the health and safety scheduler tasks
Self Assessment:

Manager's Comment:

Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'.
Action must be, or is being taken to improve performance.

## **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

## **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

#### Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated'.

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

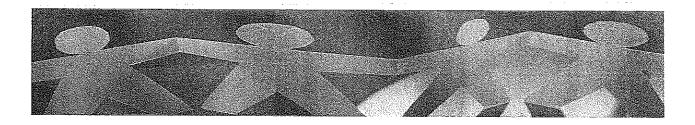
# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance	Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
towards Future Goals		. 6		

coaching notes

11



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Regional Disability Advisor	
Manager's Name:		
Review Period: to		
Employees Comments:		
Managers Comments.		
Date Key Deliverables ag	reed:	
(Manager)	(Staff Member	)
Date Performance Review	Completed:	
Performance Review Agre (Refer to page 23 of the g		Yes / No
(Manager)	(Staff Member	)
Overall rating:		

# Key Deliverables - refer page 8 of guidelines

# Ratings:

## Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

## **Expectation Achieved**

Key deliverable and agreed measure(s) met.

## **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

SE	RVICE EXCELLENCE		
Ad	lvisory service		
	Provides disability related advice to case managers on disabled clients	$\Omega_{\bullet}$	
•	<ul> <li>Provides professional advice and recommendations on specific client referrals with a focus or sustainable employment outcomes</li> </ul>		
8			
0	Keeps up-to-date with current research, issues and practices in the disabil	ity field	
Self Assessment:			
Ма	nager's Comment:	Rating:	
Rel	lationship management		
	Develops and maintain effective relationships with disability service provide support this client group.	ers and agencies that	
•	Develops and maintains effective relationships with case managers and er	Inlovment coordinators	
Provides support to RDA's in other regions when required			
Provides support to the RHA and HDC when required			
Plays a key role in health and disability governance groups regionally and nationally			
Self Assessment:			

Timeliness  Referrals for specialised assessment are made within 24 hours Provides timely updates to regional and national office on client referrals Timely reporting  Self Assessment:  Manager's Comment:  Rating:  Planning Contributes to the operational plan for the North and Income region as required Provides advice on regional disability initiative as part of regional planning Participates in proprint and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:  Rating:	Manager's Comment:	Rating:	
Referrals for specialised assessment are made within 24 hours Provides timely updates to regional and national office on client referrals Timely reporting  Self Assessment:  Manager's Comment:  Rating:  Planning Contributes to the operational plan for the Work and Income region as required Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:  Self Assessment:			
Referrals for specialised assessment are made within 24 hours Provides timely updates to regional and national office on client referrals Timely reporting  Self Assessment:  Manager's Comment:  Rating:  Planning Contributes to the operational plac for the Work and Income region as required Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:  Self Assessment:			
Provides timely updates to regional and national office on client referrals Timely reporting  Self Assessment:  Manager's Comment:  Rating:  Planning Contributes to the operational plan for the Work and Income region as required Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:  Self Assessment:	Timeliness		
Manager's Comment:  Planning  Contributes to the operational plan for the Work and Income region as required Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:	<ul> <li>Provides timely updates to regional and national office on client referrals</li> </ul>		
Planning  Contributes to the operational plan for the Work and Income region as required  Provides advice on regional disability initiative as part of regional planning  Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:	Self Assessment:		
Planning  Contributes to the operational plan for the Work and Income region as required  Provides advice on regional disability initiative as part of regional planning  Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:			
<ul> <li>Contributes to the operational plan for the Work and Income region as required</li> <li>Provides advice on regional disability initiative as part of regional planning</li> <li>Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor</li> </ul> Self Assessment:	Manager's Comment:	Rating:	
<ul> <li>Contributes to the operational plan for the Work and Income region as required</li> <li>Provides advice on regional disability initiative as part of regional planning</li> <li>Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor</li> </ul> Self Assessment:			
Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:	Planning		
Provides advice on regional disability initiative as part of regional planning Participates in planning and supervision activities that involve other RDAs and/or with the Principal Disability Advisor  Self Assessment:	Contributes to the operational plan for the Work and Income region as required.	uired	
Self Assessment:			
Self Assessment:			
Self Assessment:  Manager's Comment:  Rating:	Disability Advisor		
Manager's Comment:	Self Assessment:		
wanager's Comment.	Bill postorio Comments	Dating	
	малауег s Comment:	rating:	

ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or pro	ejects you have been responsible for during the year
What is to be achieved:	
•	
©	
9	
Self Assessment:	
Manager's Comment:	Rating:
ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or pro	jects you have been responsible for during the year
What is to be achieved:	
Self Assessment:	
Comment of the contract of the	
Manager's Comment:	
manager a comment.	Rating:

# Success Factors - refer to page 11 of guidelines

# Ratings:

## Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

#### Competent

Demonstrates the appropriate behaviours.

#### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills Demonstrates strong interpersonal skills. is confident when working with clients and colleagues treats all people with dignity and respect demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others demonstrates the ability to work positively with others to exhibit outcomes stays calm, objective, and positive during difficult situations demonstrates the ability to resolve conflicts. Self Assessment: Rating:

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language  is able to simplify complex issues when required questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation		
Self Assessment:		
Manager's Comment:	ng:	
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team prepared in all working relationships  willingness to go the extra mite assisting others as necessary for the benefit of the identifies, develops and uses both internal and external networks that add value of works in partnership with internal and external contacts where appropriate, in order and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values needs and aspirations of potential partners while successful the Ministry.	or provide opportunities er to maximise services	
Self Assessment:		
Manager's Comment:	ng:	

# Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes. keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others · coaches colleagues through errors to ensure that future mistakes are avoided understands and applies all relevant policies, guidelines and standards positively supports and accepts new processes demonstrates the ability to self source information actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues Self Assessment: Manager's Comment: Being Accountable Takes ownership for quality of work · takes responsibility for own workload and appreciates how own behaviour impacts upon others • is reliable, self-dissiplined and proactive readily accepts feedback on performance and applies feedback on the job manages time affectively to ensure delivery of the best possible service maintains a strong client pous through periods of change and a positive attitude when working with changes exercises good judgment and bases all decision on reasoned analysis thinks about what sould go wrong and effectively manages as it relates to risk consistently produces high quality work Self Assessment:

Manager's Comment:

Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others  inspires trust in others, and behaves fairly and ethically at all times  respects the confidentiality of client and Ministry information  demonstrates and applies an understanding of the Ministry's vision, purpose and values  adheres to the Ministry's Code of Conduct  models the highest standards of public service behaviour and probity  always acts to enhance the Ministry's reputation			
Self Assessment:			
Manager's Comment:			
Optionals:			
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planning framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate			
Self Assessment:			
Manager's Comment: Rating:			

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ non-client base), and develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities for our clients</li> <li>develops and maintains key relationships to ensure ongoing business.</li> </ul>
Self Assessment:
Manager's Comment:
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a care series of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performance is aware of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, while also considering work life balance leads and develops effective teams to maximise the contributions of members to achieve successful outcomes provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks  Self Assessment:
Manager's Comment: Rating:

# Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

## Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

## **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

## **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

## Outstanding

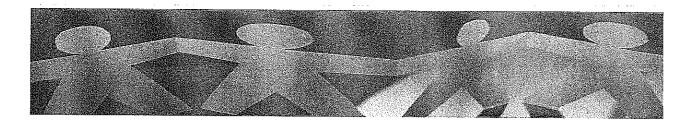
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required     to perform role     Tools required to perform role     Development/Assistance     towards Future Goals	Link to:      Key Deliverable     Success Factor     Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
·				
Attach coaching notes				



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Claims Processing Officer	
Manager's Name:		
Review Period: to		B
Employees Comments:		
Managers Comments:		
Date Key Deliverables ag	reed:	
(Manager)	(Staff Member	r)
Date Performance Review	v Completed:	
Performance Review Agr (Refer to page 23 of the g		Yes / No
(Manager)	(Staff Membe	r)
Overall rating:		

# Key Deliverables - refer page 8 of guidelines

# Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

## Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### Expectation Achieved

Key deliverable and agreed measure(s) met.

#### Exceeded Expectation

Exceeded the key deliverable and measure(s).

# AGREEMENT ADMINISTRATION / CLAIMS PROCESSING

Responsible for processing agreements and claims within relevant Ministry guidelines, standards and policies, required timeframes, and New Zealand legislation.

This includes:

- Assessing accuracy, to ensure compliance and completeness of all decumentation received in for processing
- Actioning early terminations for clients finishing on wage subsidies
- Ensuring that full and accurate records are captured and maintained in the databases, alpha and Information spreadsheets
- Actioning bank account changes in SOLO for employers spensors for Service Centres
- Ensuring all claims on confirmed status, in SOLO, are actioned as approved

#### Measures of success include:

<ul> <li>95% of agreements and claims are actioned within 24 hours of receipt</li> </ul>	
<ul> <li>95% of agreements and claims are processed accurately.</li> </ul>	
Progress reports submitted must be accurate.	
<ul> <li>Bank account changes are actioned with 24 hours of receipt</li> </ul>	
Self Assessment:	
Manager's Comment	Rating:
$((\ ))^{\vee}$	

# AGREEMENT / CLAIMS FOLLOW UP ACTIONS

- Progress reports are completed daily and submitted weekly within agreed timeframes
- Debt recovery is identified and appropriate action undertaken within agreed timeframes
- Ensure outstanding agreements and claims are followed up within agreed timeframes
- Completion of data and claim audits

Self Assessment:	
Manager's Comment:	Rating:
ADMINISTRATION / INFORMATION MANAGEMENT	
Under take, within the Unit standard, written correspondence and doc Service Centre staff	currents to employers and
Maintains full and accurate filing systems	
Self Assessment:	
Manager's Comment:	Rating:
CUSTOMER SERVICE AND SUPPORT	
Identify and respond to dustomer (internal and external) information needs and timely and accurate assistance and support to resolve the issue.	d queries through providing
Self Assessment:	
Manager's Comment:	Rating:

ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or projects you have been respon	sible for during the year
What is to be achieved:  • • • •	
Self Assessment:	
Manager's Comment:	Rating
ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or projects you have been response What is to be achieved:	Sible for during the year
Self Assessment:	
Manager's Comment.	Rating:
	Naully.

ડ	ICCESS Factors - refer to page	11 of guidelines
Ratings:		
Needs Development  Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.	Competent  Demonstrates the appropriate behaviours.	Strength  Always demonstrates the highest standards of behaviour across all situations and is a role model for others.
	n clients and colleagues and respect ag of the views, beliefs, cultural p ark positively with others to achiev itive during difficult situations	erspectives and individual differences in outcomes
Self Assessment:		·
Manager's Comment.		Rating:

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and uticommunicates clearly and simply (verbally and in writing) using appropriate language  is able to simplify complex issues when required  questions in detail, listens actively, and reserves judgment until all necessary order to understand the situation	e grammar, style and
Self Assessment:	
Manager's Comment:	Rating:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member mall working relationships  willingness to go the extra mile assisting others as necessary for the beneficientifies, develops and uses both internal and external networks that add works in partnership with internal and external contacts where appropriate, and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while the Ministry.	/alue or provide opportunities in order to maximise services
Self Assessment:	
Manager's Comment:	Rating:

<ul> <li>Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes.</li> <li>keeps knowledge of relevant business group specific and MSD products are shares this knowledge with others</li> <li>coaches colleagues through errors to ensure that future mistakes are avoid understands and applies all relevant policies, guidelines and standards</li> <li>positively supports and accepts new processes</li> <li>demonstrates the ability to self source information</li> <li>actively seeks out opportunities to increase knowledge and learn new skills skills appropriately</li> <li>is solution focused, applies a structured approach to problem solving and u resolve issues</li> </ul>	led , and applies newly gained
Self Assessment:	
Manager's Comment:	Rating:
Being Accountable  Takes ownership for quality of work.  takes responsibility for own workload and appreciates how own behaviour in is reliable, self-disciplined and proactive  readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service  maintains a strong client/foods through periods of change and a positive attichances  exercises good judgment and bases all decision on reasoned analysis  thinks about what sedid go wrong and effectively manages as it relates to rise consistently produces high quality work	itude when working with
Self Assessment:  Manager's Comment:	Datin
	Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpo adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation	
Self Assessment:	
Manager's Comment:	Rating:
Optionals:	
Training and Facilitation  (please note this success factor's optional not applicable to all roles)  implements a structured planning framework that meets the training demandent centre/region  uses an appropriate variety of delivery methods to effectively facilitate learners ensures staff or clients are given the opportunities and necessary support to learning effectively  applies an understanding of adult learning principles and adult learning style  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate	ning o learn, and apply their
Self Assessment:	
Manager's Comment:	Rating:

<ul> <li>Warketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ non-client base), and develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities for our clients</li> <li>develops and maintains key relationships to ensure ongoing business.</li> </ul>
Self Assessment:
Manager's Comment:
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and apportunities and manages these proactively  clearly communicates expectations and provides checking and feedback on performance  is aware of individuals strengths and uses them as a basis for building capability  encourages a challenging environment where people are motivated to do their best, while also considering work in balance  leads and develops effective teams to maximise the contributions of members to achieve successful outcomes  provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks  Self Assessment:
Manager's Comment: Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

## **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

## Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

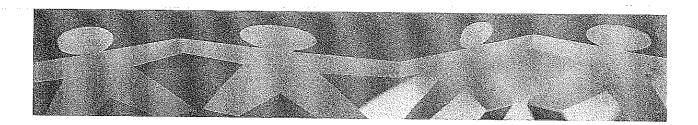
Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance	Link to:  Key Deliverable Success Factor Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
towards Future Goals				
^				

coaching notes



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Regional Health Advisor	
Manager's Name:		RIVING C
Review Period: to		
Employees Comments:		
Managers Comments:		
Date Key Deliverables ac	reed:	
(Manager)	(Staff Memb	er)
Date Performance Review	w Completed:	
Performance Review Agr (Refer to page 23 of the g	eed: guidelines)	Yes / No
(Manager)	(Staff Memb	er)
Overall rating:		

	A BOOK OF THE REAL PROPERTY.
Key Deliverables - refer page 8.	staniidalina

# Ratings:

## Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

## **Expectation Achieved**

Key deliverable and agreed measure(s) met.

## **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

23-10-2-10-10-10-10-10-10-10-10-10-10-10-10-10-			
SERVICE EXCELLENCE			
Advisory service	and the second section of the second section of the second section of the second section of the second section		
Provides health related advice to case managers on clients with ill health			
odotamable employment outcomes	Provides professional advice and recommendations on specific client referrals with a focus on sustainable employment outcomes		
<ul> <li>Where appropriate, matters are referred to the client's GP and are succession.</li> </ul>	ssfully addressed		
Keeps up-to-date with current research, issues and practices in the healt	th field		
Self Assessment:			
Manager's Comment:	Rating:		
Relationship management			
Develops and maintains effective relationships with GP's and health p support this client group  Develops and maintains effective relationships with case managers and e Provides support to RHA's in other regions when required  Provides support to the RDA and HDC when required  Plays a key role in health and disability governance groups regionally and	employment coordinators		
	папопапу		
Self Assessment:			
Manager's Comment:	Rating:		

SERVICE EXCELLENCE continued Timeliness	
<ul> <li>Referrals for specialised health assessment or health interventions are management.</li> <li>Provides timely updates to regional and national office on client referrals.</li> <li>Timely reporting.</li> </ul>	ade within 24 hours
Self Assessment:	
Manager's Comment:	Rating:
Planning	
Contributes to the operational plan for the Work and Income region as veg	uired
Participates in planning and supervision activities that involve other RHAs Health Advisor	and/or with the Principal
Self Assessment:	
Manager's Comment:	Rating:

ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or proje	cts you have been responsible for during the year
What is to be achieved:	
•	
0	
•	
Self Assessment:	
Manager's Comment:	Rating
ADDITIONAL KEY DELIVERABLE use this section to record any additional result areas or project	
What is to be achieved:	is you have been responsible for during the year
Self Assessment	
Manager's Comment:	Rating:

# Success Factors - refer to page 11 of guidelines

# Ratings:

## **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

## Competent

Demonstrates the appropriate behaviours.

## Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

People Skills  Demonstrates strong interpersonal skills.  is confident when working with clients and colleagues  treats all people with dignity and respect  demonstrates an understanding of the views, beliefs, cultural perspectives others  demonstrates the ability to work positively with others to acknow outcomes stays calm, objective, and positive during difficult situations  demonstrates the ability to resolve conflicts.	
Self Assessment:	
Manager's Comment	Rating:

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate resources communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language  is able to simplify complex issues when required questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation
Self Assessment:
Manager's Comment:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra fille assisting others as necessary for the benefit of the wider team  identifies, develops and uses both internal and external networks that add value or provide opportunities  works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values peeds and aspirations of potential partners while successfully representing the Ministry  Self Assessment:
Manager's Comment: Rating:

a contract the contract to the	
<ul> <li>Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes.</li> <li>keeps knowledge of relevant business group specific and MSD products a shares this knowledge with others</li> <li>coaches colleagues through errors to ensure that future mistakes are avoid understands and applies all relevant policies, guidelines and standards</li> <li>positively supports and accepts new processes</li> <li>demonstrates the ability to self source information</li> <li>actively seeks out opportunities to increase knowledge and learn new skills skills appropriately</li> <li>is solution focused, applies a structured approach to problem solving and uresolve issues</li> </ul>	ded s, and applies newly gained
Self Assessment:	
Manager's Comment:	Rating:
Being Accountable  Takes ownership for quality of work.  takes responsibility for own workload and appreciates how own behaviour in is reliable, self-disciplined and proactive  readily accepts feedback on performance and applies feedback on the job manages time affectively to ensure delivery of the best possible service  maintains a strong client focus through periods of change and a positive attichanges  exercises good judgment and bases all decision on reasoned analysis  thinks about what seem go wrong and effectively manages as it relates to rise consistently produces high quality work  Self Assessment:	tude when working with
Manager's Comment:	Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation	e and values
Self Assessment:	
Manager's Comment:	Rating
Optionals:	
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planning framework that meets the training demand centre/region  uses an appropriate veriety of delivery methods to effectively facilitate learning ensures staff or clients are given the opportunities and necessary support to learning effectively  applies an understanding of adult learning principles and adult learning style  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate	ing learn, and apply their
Self Assessment:	
Manager's Comment:	Rating:

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ n develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities and develops and maintains key relationships to ensure ongoing business.</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and apportunities and manages these proactively clearly communicates expectations and provides coaching and feedback or is aware of individuals' strengths and uses them as a basis for building capa encourages a challenging environment where people are motivated to do the considering work life balance leads and develops effective teams to maximise the contributions of member outcomes provides a healthy and safe work environment for their team(s) including co safety scheduler tasks	ability leir best, while also ers to achieve successful
Self Assessment:	
Manager's Comment:	Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

# **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

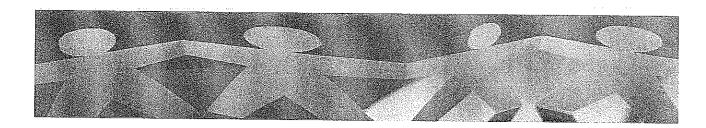
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success sociors demonstrated.

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achiever:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:      Key Deliverable     Success Factor     Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
towards i didire Goals				
			>	
Attack coaching notes				



# Performance Development and Assessment

Staff Member's Name:		
Position:	Work Broker	
Manager's Name:		
Review Period:		
Employees Comments:		
Managers Comments:		
Date Key Dekverables agreed	<b>1</b> :	
(Manager)		(Staff Member)
Date Performance Review Co	mpleted:	
Performance Review Agreed (Refer to page 23 of the guide	elines)	Yes / No
(Manager)		(Staff Member)
Overall rating:		

	17			
Ratings:	Key Deliverables	erefer page 8 of guidelines		
Needs Improvement	Substantially Achieved	Expostation Ashirum J		
Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.	Key deliverable and measure(s) is mostly met. Considerable progress has been made.	Key deliverable and agreed measure(s) met.	Exceeded Expectation  Exceeded the key deliverable and measure(s).	
Key Deliverables				
<ul> <li>assess supply and dem appropriate vacancies a works in conjunction wisignificant local employ employers</li> <li>proactively advises clied attending/facilitating set</li> </ul>	e in line with national/regionand needs on a daily basis are sourced which match out the labour market team to ers e.g. develop tailored reconts and employers of relevationers	(eq using vacancy management	ent campaigns with ins for local his could include	
Self Assessment:			$\rightarrow$	
Manager's Comment:			Detino	
			Rating:	
contributes to a high quality end-to an precruitment service through creating and maintaining relationships with employers who can provide opportunities for our clients.     conducts appropriate follow up activities daily to ensure effective vacancy management including: monitoring of, and resulting actions from expressions of interest (all candidates to be contacted within 5 working days of ROI and updated on their application status) monitoring employers with open or on-hold vacancies once every 2 days (or as per the provice Level Agreement) to follow up on referrals made to the provided and products and services to employers and markets Work and Income products and services to employers makes an appropriate contribution to regional target of 80% of employers who have used Work and Income services in the previous three months would recommend our services to other employers makes an appropriate contribution to employer satisfaction ratings.  Self Assessment:				
Manager's Comment:			Rating:	

Key Deliverables	
Vacancy Management Outcomes	<u> </u>
Refers only to staff managing vacancies	
Proactively engage to increase the number of filled vacancies sourced by Work and     Supporting Manitered	Income
Supporting Monitors:  Vacancy management timelines monitors:	
Intital search with 24 hours	
Final shortlist no later than 5 days	
<ul> <li>Vacancies closed within 20 days, unless the needs of a business require longer</li> </ul>	timoframa
<ul> <li>completes wage subsidy templates within 5 working days of the employer's request 90% completed accurately</li> </ul>	for a subsidy with
<ul> <li>for work brokers with involvement in crown expenditure:</li> </ul>	
<ul> <li>demonstrates a knowledge of budget targets and maximises expenditure within t</li> </ul>	he site / cluster
budget	
<ul> <li>carries out regular monitoring of clients we placed in crown projects in accordance set by the Region</li> </ul>	e with standards
<ul> <li>monitor early finishes of subsidies regularly and return savings to crown budget</li> </ul>	
o provides evidenced explanations/mitigation strategies to support over or undersp	ends ()
Self Assessment:	enda
Sell Assessment:	
	~
Manager's Comment:	Rating:
	Rading.
Client Outcomes:	
· contributes to the region's targeted benefit register reductions, through profiling and	placing clients into
work	
accurate assessment of slient's needs to determine what service delivery model bes	t fits the clients'
needs	
<ul> <li>contribute to clients work readiness e.g. feedback on CVs, personal presentation, in</li> <li>works with case managers to facilitate a smooth transition into work for clients as we</li> </ul>	terview techniques
on Labour Market Intelligence	ii as updating them
Self Assessment:	
•	
Manager's Comment:	Rating:
	· /40113

ADDITIONAL KEY DELIVERABLES use this section to record any additional result areas or projects you have been responsible for du	ring the year
What is to be achieved:	<u> 2000 - Program December Alberta</u>
•	
<b>&amp;</b>	
•	
Self Assessment:	
	· /
	9
Manager's Comment:	Rating:
	$\supset$
What is to be achieved:	
Self Assessment:	
Manager's Comment	
Manager's Comment:	Rating:

Needs Development	Competent	Strength			
Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.	Demonstrates the appropriate behaviours.	Always demonstrates the highest standards of behaviour across all situations and is a role model for others.			
Success Factors					
Others	h clients and colleagues and respect ng of the views, beliefs, cultural perspect ork positively with others to achieve out sitive during difficult situations				
Self Assessment:					
Manager's Comment:					
		Rating:			
Communication Skills					
<ul> <li>tailors communication to the to</li> </ul>	dy across all forms of communication. arget audience, preparing adequately a				
I . Communicates clearly and sim	אסא√verbally and in writing) using appr	nd utilising appropriate resources			
<ul> <li>communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>is able to simplify complex lastes when required</li> </ul>					
<ul> <li>questions in detail, tistens actively, and reserves judgment until all necessary information is extracted in order to understand the situation.</li> </ul>					
Self Assessment:					
Manager's Comment:		Rating:			

Success Factors – refer to page 11 of guidelines

Ratings:

Partnerships and Relationship Management  Builds a network of contacts both within and beyond Work and Income  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wid  identifies, develops and uses both internal and external networks that add value or pro  works in partnership with internal and external contacts where appropriate, in order to and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while successful Ministry.	ovide opportunities maximise services
Self Assessment:	
Manager's Comment:	Rating:
Maximising Knowledge and Application  Uses all resources available in order to deliver successful outcomes  • keeps knowledge of relevant basiness group specific and MSD products and services shares this knowledge with others  • coaches colleagues through errors to ensure that future mistakes are avoided  • understands and applies all relevant policies, guidelines and standards  • positively supports and accepts new processes  • demonstrates the ability to self source information  • actively seeks out opportunities to increase knowledge and learn new skills, and appliately  • is solution focused, applies a structured approach to problem solving and uses appropries lessues.	es newly gained
Self Assessment:	
Manager's Comment:	Rating:

Success Factors

Success Factors	
Being Accountable Takes ownership for quality of work.  takes responsibility for own workload and appreciates how own behaviour impacts upon is reliable, self-disciplined and proactive readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service maintains a strong client focus through periods of change and a positive attitude when changes exercises good judgment and bases all decision on reasoned analysis thinks about what could go wrong and effectively manages as it relates to risk consistently produces high quality work.	
Self Assessment:	
Manager's Comment:	Rating:
Public Service Integrity Is committed to serving the people of New Lealand with honesty and integrity.  communicates openly and honesty with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of slient and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose and value adheres to the Ministry's Code of Conduct models the Kighest standards of public service behaviour and probity always acts to enhance the Ministry's reputation.  Self Assessment:	es
Manager's Comment:	Rating:
•	

# Optional Success Factors Training and Facilitation (please note this success factor is optional not applicable to all roles) · implements a structured planning framework that meets the training demands of the service uses an appropriate variety of delivery methods to effectively facilitate learning ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively applies an understanding of adult learning principles and adult learning styles evaluates whether the transfer of learning has occurred undertakes internal marketing of training opportunities where appropriate. Self Assessment: Manager's Comment: Marketing and Negotiation (This is a key success factor for work brokers allocated to the function of mobile work bro markets and promotes products and services to external parties identifies and prioritises areas of need (focusing on disadvantaged client hase), and develops a plan around delivery of marketing activities targets marketing activities to where greatest opporturities exist effectively negotiates with internal and external parties to maximise opportunities for our clients develops and maintains key relationships to ensure ongoing busidess. Self Assessment: Manager's Comment: Rating: Leading People (applies only to people with staff management responsibilities) provides Jeadership by creating a core sense of purpose and vision identifies difficult sues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performance is aware of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, while also considering work life balance leads and develops effective teams to maximise the contributions of members to achieve successful provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks. Self Assessment: Manager's Comment: Rating:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

# **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

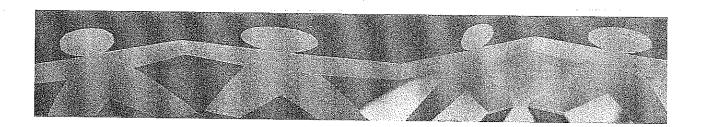
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success stators demonstrated'

Key Successes and Highlights	(Q)_		$V_{\pm}$
Self:			
		100	
		>	
	MIL		
Manager's:			
	<i>&gt;</i>		
Overall Rating Achieved:			
(V) * .			

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
Attach coaching notes				



# Performance Development and Assessment System

Staff Member's Name:		
Position:	Service Centre Trainer	
Manager's Name:		
Review Period: to		
Employees Comments:		
Managers Comments:		
Date Key Deliverables a	greed:	
		!
(Manager)	(Staff Memb	per)
Date Performance Revie	w Completed:	
Performance Review Ag (Refer to page 23 of the		Yes / No
(Manager)	(Staff Memb	ver)
Overall rating:		

# Key Deliverables – refer page 8 of guidelines

# Ratings:

# Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

## Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

# Exceeded Expectation

Exceeded the key deliverable and measure(s).

# PERFORMANCE AND CAPABILITY

# Quality monitoring

- service centre timeliness results meet or exceed the required timeliness standards
- service centre quality results meet or exceed the required accuracy standards
- monthly service excellence, ROD and HIYA complaint reports, as well as any other additional information are monitored to identify any training needs or emerging issues
- training needs are identified using the DNA (Development Needs Analysis) Test in Totara LMS as appropriate
- training needs are discussed and agreed with the learner and service centre manager (and regional training co-ordinator if appropriate) then added to Learning Plans on Totara LMS and scheduled for delivery
- · ongoing monitoring of performance at both site level and far individual staff members
- identifies site trends/issues/concerns from quality cheeks or operational audits and develops solutions to address them, including preparing detailed training plans to address skill gaps
- undertakes observational and teal-time checks for case managers (this includes case managers on 100% checks) in accordance with the Quality Bluedrint and updates Learning Plans on Totara LMS as appropriate

# Self Assessment

Manager's Comment:

Rating:

# Learning outcomes

- delivers training on items in Learning Plans in Totara LMS according to national and regional priorities, in an effective and co-coordinated way with the regional training co-ordinator
- manages sign-offs and updates to Totara LMS to show competence has been attained following the delivery of training items in Learning Plans
- updates and maintains Learning Plans in consultation with learners, service centre managers and Regional Training Co-ordinators
- provides support and assistance to learners following initial training to ensure effective transfer of learning

<ul> <li>provides support for individual staff to ensure that clients are receiving effective and correct entitlement to benefit and support to achieve their goals</li> </ul>	ective case management, full
<ul> <li>supports and champions the service centre manager to implement change</li> </ul>	within the service centre
<ul> <li>observes interactions with clients and provides constructive feedback to le management skills and identifies and updates Learning Plans in Totara LN</li> </ul>	arners on effective case
Self Assessment:	
Manager's Comment:	Rating
Quality Culture	
Participates in the development of initiatives to improve service performance staff:	and develop the capability of
<ul> <li>ensure new policies and practices are implemented effectively, inneeded a issues/concerns and provided to the service centre manager.</li> </ul>	a plan is developed on
• champion the quality culture approach to staff	
all activities contribute to overall improvement in site service excellence re-	sults and staff competence
Self Assessment:	
Manager's Comment:	Rating:

# SERVICE EXCELLENCE

# Timeliness

- ensures ARP sample requests are completed and outstanding cases are followed up within 48 hours
- reports submitted to the service centre manager on the performance of case managers are within agreed timelines
- ensures activities are structured and completed within required timeframes and standards, eg monthly reports on time, checks completed

Self Assessment:	
Manager's Comment:	Rating:
Accuracy  maintains accurate individual and team quality data  reports submitted to the service centre manager on the performance of carexpected quality standards	se managers against
Self Assessment:	
Manager's Comment:	Rating:
Client satisfaction  85% of the service centre's olients are "very satisfied" or "satisfied" with the centre result)  maintains service excellence standards as per the service excellence standards.	·
Self Assessment:	
Manager's Comment:	Rating:

# Success Factors -refer to page 11 of guidelines

# Ratings:

# Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

# Competent

Demonstrates the appropriate behaviours.

# Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills

Demonstrates strong interpersonal skills.

- is confident when working with clients and colleagues
- treats all people with dignity and respect

demonstrates an understanding of the views halfafa will a	
<ul> <li>demonstrates an understanding of the views, beliefs, cultural perspect others</li> </ul>	ives and individual differences in
<ul> <li>demonstrates the ability to work positively with others to achieve outcome.</li> </ul>	
<ul> <li>stays calm, objective, and positive during difficult situations</li> </ul>	71183
demonstrates the ability to resolve conflicts.	
and all all all all all all all all all al	\ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \ \
Self Assessment:	>
Manager's Comment:	Rating:
	Rating.
/> \\	1

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and ut communicates clearly and simply (verbally and in writing) using appropriat language	ilising appropriate resources e grammar, style and
<ul> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessor order to understand the situation.</li> </ul>	ary information is extracted in
Self Assessment:	
Manager's Comment:	Rating:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information participates as a positive team member in all working relationships willingness to go the extra mile assisting others as necessary for the benefit identifies, develops and uses both internal and external networks that add works in partnership with internal and external contacts where appropriate, and avoid duplication has the respect of others and is a positive role model contributes towards a positive working and environment understanding the values, needs and aspirations of potential partners while the Ministry.	/alue or provide opportunities in order to maximise services
Self Assessment:	
Manager's Comment:	Rating:

<ul> <li>Maximising Knowledge and Application Uses all resources available in order to deliver successful outcome.</li> <li>keeps knowledge of relevant business group specific and MSD shares this knowledge with others.</li> <li>coaches colleagues through errors to ensure that future mistake.</li> <li>understands and applies all relevant policies, guidelines and stepositively supports and accepts new processes.</li> <li>demonstrates the ability to self source information.</li> <li>actively seeks out opportunities to increase knowledge and lead skills appropriately.</li> <li>is solution focused, applies a structured approach to problem so resolve issues.</li> </ul>	products and services up to date and es are avoided andards rn new skills, and applies newly gained
Self Assessment:	
·	
Manager's Comment:	Rating
Being Accountable  Takes ownership for quality of work  takes responsibility for own workload and appreciates how own to is reliable, self-disciplined and proactive  readily accepts feedback on performance and applies feedback of manages time effectively to ensure delivery of the best possible of maintains a strong client focus through periods of change and a period of change and a period of the consistently produces high quality work.	on the job service positive attitude when working with
Self Assessment:	
Manager's Comment:	Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others  inspires trust in others, and behaves fairly and ethically at all times  respects the confidentiality of client and Ministry information  demonstrates and applies an understanding of the Ministry's vision, purpose and values  adheres to the Ministry's Code of Conduct  models the highest standards of public service behaviour and probity  always acts to enhance the Ministry's reputation.	·
Self Assessment:	
	K
Manager's Comment:	\$ ·
Optionals:	
Training and Facilitation  (please note this success factor is optional and not applicable to all roles)  implements a structured planning framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or clients are given the apportunities and necessary support to learn, and apply learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate.  Self Assessment:	their
Manager's Comment: Rating:	

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ non-client badevelops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities for outdevelops and maintains key relationships to ensure ongoing business.</li> </ul>	,
Self Assessment:	
Manager's Comment:	
	> V
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback on performar  is aware of individuals' strengths and uses them as a basis for building capability  encourages a challenging environment where people are motivated to do their best, w  considering work life balances  leads and develops effective teams to maximise the contributions of members to achie outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks.	hile also eve successful
Self Assessment:	
Manager's Comment: Rating:	

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

# **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

# Outstanding

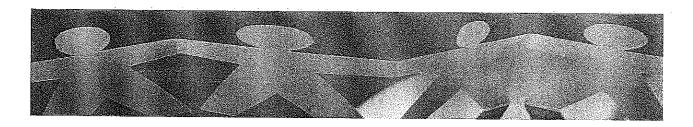
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required     to perform role     Tools required to perform role     Development/Assistance     towards Future Goals	Link to:  Key Deliverable Success Factor Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
Attach coaching notes				



# Performance Development and Assessment System

Staff Member's Name:		·
Position:	Service Quality Officer	
Manager's Name:		
Review Period: to		RAM
Employees Comments:		
Managers Comments:		
Date Key Deliverables agr	eed:	
(Manager)	(Staff Membe	er)
Date Performance Review	Completed:	
Performance Review Agre (Refer to page 23 of the gu	ed: uidelines)	Yes / No
(Manager)	(Staff Membe	er)
Overall rating:		

# Key Deliverables - refer page 8 of guidelines

# Ratings:

# Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

# Exceeded Expectation

Exceeded the key deliverable and measure(s).

# QUALITY

# **Quality Monitoring**

- completes monthly regional checking requirements for competent case managers as per regional standards
- undertakes observational and real-time checks for case managers as per the Quality Blueprint
- monitors trends, training issues and areas of concern
- identifies areas for improvement
- completes a monthly report outlining trends, training issues and areas of concern to the service centre trainer for each site
- training needs identified are referred to the Regional Training Co-ordinator
- · provides constructive feedback to case manager, service centre trainer and service centre manager

Self Assessment:	
	_<<

	Mana	aer's	Comm	ient
--	------	-------	------	------

Rating:

# Quality Colture

Participates in the development of initiatives to improve service performance and develop the capability of staff.

hmprovements made in regional capability and service excellence quality

• all activities contribute to a overall improvement in regional service excellence results and staff development/competencies

# Self Assessment:

Manager's Comment:	Rating:
SERVICE EXCELLENCE	
Timeliness	
<ul> <li>provides feedback to the site on the monthly regional che</li> </ul>	ecking results within agreed timeframes
<ul> <li>ensures that reports are submitted to the region/service</li> </ul>	
<ul> <li>ensures statistical data for coaching and achievement reservice centre trainer within agreed timeframes</li> </ul>	
<ul> <li>ensures that corrections are completed within 48 hours</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
Accuracy	
maintains accurate individual and team quality data	
<ul> <li>reports/updates on service excellence results that are sul Centre Trainer and Operations Manager meet expected of</li> </ul>	
Self Assessment	
Manager's Comment:	Rating:
Client satisfaction	
relevant service centre managers are satisfied with the level	vel of support and service provided
maintains service excellence standards as per the service	

Self Assessment:	
lanager's Comment:	Rating:

# Success Factors - refer to page 11 of guidelines

# Ratings:

# **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

# Competent

Demonstrates the appropriate behaviours.

# Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills Demonstrates strong interpersonal skills. • is confident when working with clients and colleagues • treats all people with dignity and respect • demonstrates an understanding of the views, beliefs, cultural perspectives and individual offerences in others • demonstrates the ability to work positively with others to actieve outsomes • stays calm, objective, and positive during difficult situations • demonstrates the ability to resolve conflicts. Self Assessment: Rating:

Communication Skills Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilis communicates clearly and simply (verbally and in writing) using appropriate language	sing appropriate resources grammar, style and
<ul> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessar order to understand the situation</li> </ul>	y information is extracted in
Self Assessment:	
Manager's Comment:	Rating:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit identifies, develops and uses both internal and external networks that add values works in partnership with internal and external contacts where appropriate, in and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while standing the Ministry.	alue or provide opportunities order to maximise services
Self Assessment:	
Manager's Comment:	Rating:

# Maximising Knowledge and Application

Uses all resources available in order to deliver successful outcomes.

- keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others
- · coaches colleagues through errors to ensure that future mistakes are avoided
- understands and applies all relevant policies, guidelines and standards
- positively supports and accepts new processes
- · demonstrates the ability to self source information
- actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately
- is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues

Self Assessment:	
Manager's Comment:	Rating:
Being Accountable  Takes ownership for quality of work.  takes responsibility for dwn workload and appreciates how own behaviour im is reliable, self-disciplined and proactive.  readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service maintains a strong client focus through periods of change and a positive attit changes exercises good judgment and bases all decision on reasoned analysis thinks about what could go wrong and effectively manages as it relates to ris consistently produces high quality work  Self Assessment:	ude when working with
Manager's Comment:	Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpos adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation	
Self Assessment:	
Manager's Comment:	Rating:
Optionals:	
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planning framework that meets the training demand centre/region  uses an appropriate variety of delivery methods to effectively facilitate learn  ensures staff or clients are given the opportunities and necessary support to learning effectively  applies an understanding of asult learning principles and adult learning style  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate	ing b learn, and apply their
Self Assessment:	
Manager's Comment:	Rating:

<ul> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ not develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities and maintains key relationships to ensure ongoing business.</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback on  is aware of individuals strengths and uses them as a basis for building capa  encourages a challenging environment where people are motivated to do the considering work life balance  leads and develops effective teams to maximise the contributions of member outcomes  provides a healthy and safe work environment for their team(s) including considering scheduler tasks  Self Assessment:	ability eir best, while also ers to achieve successful
Manager's Comment:	Rating:

# Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

# Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

# **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

# **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

### Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success Actors demonstrated.

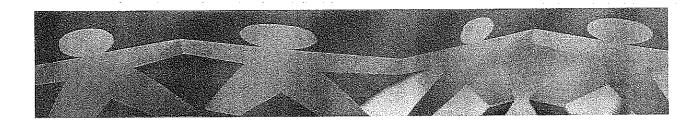
Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
towards Future Goals				
				·
			>	
		· .		

coaching notes



# Performance Development and Assessment System

Staff Member's Name:			
Position:	Support Office	cer Contact Cent	tre
Manager's Name:			
Review Period:	to		
Employees Comments:			
Managers Comments:	3/2/6	<u>)                                    </u>	
Date Key Deliverables a	greed:		
(Manager)		(Staff Member	7)
Date Performance Revie	ew Completed:		
Performance Review Ag (Refer to page 23 of the			Yes / No
(Manager)		(Staff Membe	r)
Overall rating:			·

# Key Deliverables - refer page 8 of guidelines

# Ratings:

# Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partiy demonstrated.

# Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

# Exceeded Expectation

Exceeded the key deliverable and measure(s).

# Mail administration

Mail administration duties are completed in accordance with the required standards and timeframes. This includes:

- Collecting and distributing incoming mail (daily)
- Collecting, checking for accuracy, attaching relevant documents and dispatching outgoing main agreed standards and timeframes (within 48 hours)
- Providing expert advice and support on letter content and Style Guide principles to customer service representatives (as and when required)
- Collecting, checking and sending faxes within agreed time rames (within 24 hours)
- Collecting and recording data for reporting purposes

Self A	Assessme	nt:
--------	----------	-----

Man	ade	r's	Co	mm	eat:

Rating:

# Building & Equipment administration

Building repairs and maintenance are completed in a timely way and site equipment is operational and well maintained at all times. This includes:

- Ensuring that any building repairs/maintenance are initiated within required timeframes 1 hr for urgent and 24 hrs non urgent; and that repairs are completed to a satisfactory standard
- Ensuring that Health & Safety Team Service Manager is advised if there is a potential hazard
- Ensuring that site equipment is operational and maintained e.g. headsets
- Ensuring that all equipment is labelled and accounted for

Self Assessment:			
Manager's Comment:	Rating:		
General administration			
Complete general administration duties in accordance with site retained the efficient running of the site. This includes:	quirements to support		
<ul> <li>Checking on and ensuring that there are adequate supplies of stationery/for</li> </ul>	rms/brochures available		
Arranging travel to Ministry standards and in a timely manner			
Completing photocopying within required time frames	<b>~</b>		
<ul> <li>Ensuring that documents and electronic databases are stored and retrieve Ministries guidelines, including ensuring that all confidential information is:</li> </ul>			
<ul> <li>In the E.A's absence, assist with performing duties and tasks within timefra</li> </ul>	4 - G		
<ul> <li>Meeting and greeting visitors and ensuring appropriate OSH sign-ins are completed (if applicable)</li> <li>Other ad hoc duties that assist with the effective running of the site</li> </ul>			
Keeping the tea station areas clean and tidy when visitors are on site and applicable)	returning surplus crockery (if		
Self Assessment			
Manager's Comment:	Rating:		

# Financial Administration Complete financial administration duties to the required standards and timeframes. This includes: Completing requisitions correctly and in a timely manner – 1 day (non-urgent), 2 hours (urgent) Liaising with the EA on the cost of requisitions for budget purposes Undertaking monthly bulk orders to ensure cost effectiveness. Ensuring that returned/replaced goods for credit are actioned within 2 working days Ensuring that manual accounts are completed and coded correctly, and sent to NAC within finance deadlines Ensuring that the taxi report and fuel card dockets are accurately checked and completed to Ministry standards Self Assessment: Manager's Comment: Human Resources Administration Complete human resources administration duties to the required standards and timeframes. This includes: Checking and updating Business Continuity Emergency information within required timeframes Accurately recording and entering absences/overtime data into CHRIS by required deadlines Conducting CHRIS audits on timesheets to check for accuracy Ensuring that recruitment processes meet deadlines and Ministry standards when dealing with advertising, concespondence, appointment documentation and appointee forms sent to payroll, set up of personnel files and Staff CV access (if applicable) nsuring that statistical information required is actioned within required deadlines Self Assessment:

Manager's Comment:

Rating:

# **Building Security/Setting up for New Recruits**

Ensure building security is maintained at all times and that setting up security arrangements for new and existing staff is done according to required timeframes and standards. This includes:

- Confidently setting and un-setting building alarm for overtime, when the contact centre works Saturday/Sunday plus any time changes required
- Accurately programming/cancelling building security cards
- Accurately updating security card register

•	Accurately keeping mobile & locker key spreadsheet and cabinet up-to-dataway in key register cabinet.	te and ensuring keys locked		
۰	Accurately allocating mobile and locker keys to new staff			
۰	Organising and replenishing mobile cabinets for new staff			
۰	Ordering name badges and desk plaques and checking them on arrival for	new staff		
Se	Self Assessment:			
Ma	unager's Comment:	Rating:		

#### Success Factors – refer to page 11 of guidelines

#### Ratings:

#### Needs Development

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

#### Competent

Demonstrates the appropriate behaviours.

#### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

# People Skills Demonstrates strong interpersonal skills. is confident when working with clients and colleagues treats all people with dignity and respect demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others demonstrates the ability to work positively with others to achieve outcomes stays calm, objective, and positive during difficult situations demonstrates the ability to resolve conflicts. Self Assessment: Rating:

<ul> <li>Communication Skills</li> <li>Communicates clearly and fluently across all forms of communication.</li> <li>tailors communication to the target audience, preparing adequately and utilis</li> <li>communicates clearly and simply (verbally and in writing) using appropriate glanguage</li> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessary order to understand the situation</li> </ul>	grammar, style and
Self Assessment:	
Manager's Comment:	Rating:
Partnerships and Relationship Management  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit  identifies, develops and uses both internal and external networks that add va  works in partnership with internal and external contacts where appropriate, in and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while the Ministry.	alue or provide opportunities n order to maximise services
Self Assessment:	
Manager's Comment:	Rating:

# Maximising Knowledge and Application Uses all resources available in order to deliver successful outcomes. • keeps knowledge of relevant business group specific and MSD products and services up to date and shares this knowledge with others coaches colleagues through errors to ensure that future mistakes are avoided understands and applies all relevant policies, guidelines and standards positively supports and accepts new processes demonstrates the ability to self source information actively seeks out opportunities to increase knowledge and learn new skills, and applies newly gained skills appropriately is solution focused, applies a structured approach to problem solving and uses appropriate techniques to resolve issues Self Assessment: Manager's Comment: Being Accountable Takes ownership for quality of work. · takes responsibility for own workload and appreciates how own behaviour impacts upon others is reliable, self-disciplined and proactive readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service maintains a strong client focus through periods of change and a positive attitude when working with exercises good Judgment and bases all decision on reasoned analysis thinks about what could go wrong and effectively manages as it relates to risk consistently produces high quality work Self Assessment:

Manager's Comment:

Rating:

Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and honestly with others inspires trust in others, and behaves fairly and ethically at all times respects the confidentiality of client and Ministry information demonstrates and applies an understanding of the Ministry's vision, purpose and values adheres to the Ministry's Code of Conduct models the highest standards of public service behaviour and probity always acts to enhance the Ministry's reputation	-
Self Assessment:	
Manager's Comment:	>
Optionals:	•
Training and Facilitation  (please note this success factor is optional not applicable to all roles)  implements a structured planting framework that meets the training demands of the service centre/region  uses an appropriate variety of delivery methods to effectively facilitate learning  ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively  applies an understanding of adult learning principles and adult learning styles  evaluates whether the transfer of learning has occurred  undertakes internal marketing of training opportunities where appropriate	
Self Assessment:	
Manager's Comment: Rating:	

<ul> <li>Marketing and Negotiation</li> <li>(please note this success factor is optional not applicable to all roles)</li> <li>markets and promotes products and services to external parties</li> <li>identifies and prioritises areas of need (focusing on disadvantaged client/ non-client base), and develops a plan around delivery of marketing activities</li> <li>targets marketing activities to where greatest opportunities exist</li> <li>effectively negotiates with internal and external parties to maximise opportunities for our clients</li> <li>develops and maintains key relationships to ensure ongoing business.</li> </ul>
Self Assessment:
Manager's Comment:
Leading People  (applies only to people with staff management responsibilities)  • provides leadership by creating a core series of purpose and vision  • identifies difficult issues and opportunities and manages these proactively  • clearly communicates expendations and provides coaching and feedback on performance  • is aware of individuals' strengths and uses them as a basis for building capability  • encourages a challength environment where people are motivated to do their best, while also considering work life balance  • leads and develops effective teams to maximise the contributions of members to achieve successful outcomes  • provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks
Manager's Comment: Rating:

#### Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

#### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

#### Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

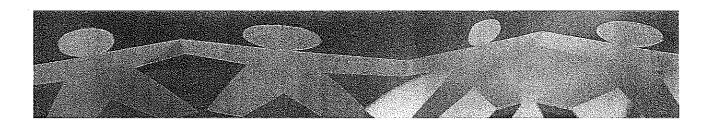
Key Successes and Highlights:	
Self:	
Manager's:	
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Link to:      Key Deliverable     Success Factor     Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
	<ul><li>Key Deliverable</li><li>Success Factor</li><li>Career Goal</li></ul>	<ul> <li>Key Deliverable</li> <li>Success Factor</li> <li>Career Goal</li> </ul>	<ul> <li>Key Deliverable</li> <li>Success Factor</li> <li>Career Goal</li> </ul> responsibilities By When?

coaching notes



# Performance Development and Assessment

Staff Member's Name:	
Position:	Specialist Case Worker
Manager's Name:	
Review Period:	
Employees Comments:	
Managers Comments:	
Date Key Deliverables agreed	
(Manager)	(Staff Member)
Date Performance Review Cor	npleted:
Performance Review Agreed: (Refer to page 23 of the guide	lines) Yes / No
(Manager)	(Staff Member)
Overall rating:	

KAVE BY		5 60		
	JINA-IK-I		refer page 8	8 of guidelines

#### Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

#### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

#### **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

Key Deliverables	
Participation in Business Practices  actively and appropriately participates in new initiatives in the business  promotes online and other self-service channels to clients and influences clients to contributes positively to the successful implementation of national, regional and site	ise these services
Self Assessment:	
Manager's Comment:	Rating:
<ul> <li>Client Development Activities</li> <li>ensures clients are enrolled identify current dircumstances and other services or into to achieve their education, training or work based goals</li> <li>develops and implements individualised allent plans, meet regularly to review and promentoring support advice and information appropriate to clients needs</li> <li>ensures client reterrals are managed within agreed timeframes and successful outcomes</li> <li>ensures client reterrals are managed within agreed timeframes and successful outcomes</li> <li>promotes brokers and refers participants to education, training, work based training development opportunities to ensure successful transition to independence</li> <li>ensures intensive case management is provided for young people, including coachir monitoring their achievement against their activities and update their plan as appropedevelops and maintains effective working relationships with relevant organisations, in government departments, schools, family and whanau, iwi and community groups, a providers, training providers and employers</li> </ul>	orovide ongoing omes achieved clients are or other or, mentoring and riate ncluding
Self Assessment:	
Manager's Comment:	Rating:
•	l .

Rey Deliverables	
<ul> <li>Client Outcomes</li> <li>Takes an active, approach to client engagement, which supports Work and Income's ar performance targets:</li> <li>supports the site to achieve the site targets of more young people engaged in educe employment</li> <li>makes appropriate individual contribution to boosting skills and employment</li> <li>shows clear evidence that successful outcomes are achieved as a result of appropriate employment and training opportunities.</li> </ul>	ation, training or
Self Assessment:	
	<b>&gt;</b>
	2
Manager's Comment:	Rating:
Timeliness	~
Supports the site to achieve service excellence standards:  ensures client referrals are managed within agreed timetrames  meets the established business standards  referrals to other agencies/service providers are made in a timely manner  ensure client's activity is updated in ART in a timely manner  required documentation is completed within agreed timetrames  provide a timely response to work requests and can adapt to shifting demands on a	daily basis.
Self Assessment:	
Manager's Comment:	B ()
managey s comment.	Rating:
Accuracy	
<ul> <li>supports the site to achieve service excellence standards</li> <li>ensures client records are complete, concise, up to date and meets expected qualit</li> </ul>	ty standards.
Self Assessment:	
och Assessment.	
Manager's Comment:	Rating:

Key Deliverables	
Service Quality Makes individual contribution to service quality by:  individual contribution to service quality monitor  maintains excellent service in line with the national service standards.	
Self Assessment:	
Manager's Comment:	Rating:
ADDITIONAL KEY DELIVERABLES use this section to record any additional result areas or projects you have been responsible for du	ring the year
What is to be achieved:	to the control of the
Self Assessment:	
Manager's Comment:	Rating:

STREET	Santara	
	Factors - refer to	page 11 of guidelines

#### Ratings:

#### **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

#### Competent

Demonstrates the appropriate behaviours.

#### Strength

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

Success Factors	
People Skills  Demonstrates strong interpersonal skills.  is confident when working with clients and colleagues  treats all people with dignity and respect  demonstrates an understanding of the views, beliefs, cultural perspectives and individ others  demonstrates the ability to work positively with others to achieve outcomes  stays calm, objective, and positive during difficult situations  demonstrates the ability to resolve conflicts.	wal differences in
Self Assessment:	
Manager's Comment:	Rating:
Communication Skills Communicates clearly and fivently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising approcess communicates clearly and simply (xerbally and in writing) using appropriate grammar, is able to simplify complex issues when required  questions in detail, listens actively, and reserves judgment until all necessary informational to understand the situation.	style and language
Self Assessment:	
Manager's Comment:	Rating:

Success Factors	
Partnerships and Relationship Management  Builds a network of contacts both within and beyond Work and Income  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wid  identifies, develops and uses both internal and external networks that add value or pro  works in partnership with internal and external contacts where appropriate, in order to and avoid duplication  has the respect of others and is a positive role model  contributes towards a positive working and environment  understanding the values, needs and aspirations of potential partners while successful Ministry.	ovide opportunities maximise services
Self Assessment:	>. /
Manager's Comment:	Rating
Maximising Knowledge and Application  Uses all resources available in order to deliver successful outcomes.  • keeps knowledge of relevant business group specific and MSD products and services shares this knowledge with others  • coaches colleagues through errors to ensure that future mistakes are avoided  • understands and applies all relevant policies, quidelines and standards  • positively supports and accepts new processes  • demonstrates the ability to self source information  • actively seeks out opportunities to increase knowledge and learn new skills, and applies skills appropriately  • is solution focused, applies a structured approach to problem solving and uses appropriesolve issues.	es newly gained
Self Assessment:	
Manager's Comments	Rating:
Being Accountable Takes ownership for quality of work.  • takes responsibility for own workload and appreciates how own behaviour impacts upon its reliable, self-disciplined and proactive  • readily accepts feedback on performance and applies feedback on the job  • manages time effectively to ensure delivery of the best possible service  • maintains a strong client focus through periods of change and a positive attitude when changes  • exercises good judgment and bases all decision on reasoned analysis  • thinks about what could go wrong and effectively manages as it relates to risk  • consistently produces high quality work.  Self Assessment:	

Manager's Comment:

Rating:

#### Success Factors

#### **Public Service Integrity**

Is committed to serving the people of New Zealand with honesty and integrity.

- · communicates openly and honestly with others
- · inspires trust in others, and behaves fairly and ethically at all times
- · respects the confidentiality of client and Ministry information
- demonstrates and applies an understanding of the Ministry's vision, purpose and values
- · adheres to the Ministry's Code of Conduct
- · models the highest standards of public service behaviour and probity
- always acts to enhance the Ministry's reputation.

#### Self Assessment:

Manager's Comment:

# Overall Performance Assessment - refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### **Needs Improvement**

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

#### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

#### Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

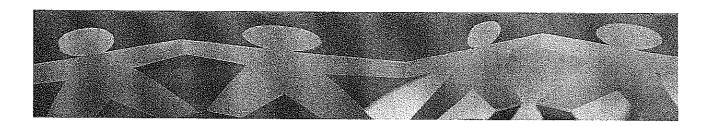
Key Successes and Highlights	
Self:	
. ( )	
Bu	
Manager's:	
Overall Rating Achieved:	
\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  • Key Deliverable  • Success Factor  • Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
			> `	

coaching notes



# Performance Development and Assessment

Staff Member's Name:		
Position:	Case Manager (Housing)	
Manager's Name:		
Review Period:		
Employees Comments:		
Managers Comments:		
Date Key Deliverables agreed:		
(Manager)		(Staff Member)
Date Performance Review Con	npleted:	
Performance Review Agreed: (Refer to page 23 of the guidel	ines)	Yes / No
(Manager)	<u> </u>	(Staff Member)
Overall rating:		

#### Key Deliverables - refer page 8 of guidelines

#### Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

#### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

#### **Exceeded Expectation**

Exceeded the key deliverable and measure(s).

#### **Key Deliverables**

#### Participation in Business Practices

- actively and appropriately participates in new initiatives in the business.
- promotes online and other self-serve services to clients and influences clients to use these.
- · contributes positively to the successful implementation of national, regional and site strategies.

#### Self Assessment:

#### Manager's Comment:

Rating:

#### Client Entitlement and Information Management

- · ensures clients receive accurate information about housing options with appropriate referrals.
- appropriate systems are updated with accurate information about processes and client housing needs.
- ensures, where possible, that all client needs are addressed and actions completed during the housing assessment, housing options seminars and but enancy review process.
- identifies and records options with clients, in line with the goal of progressing them towards independence.
- · makes appropriate referrals to other agencies.
- · demonstrates working to the appropriate legislation policy and practice.
- contributes to effective working relationships at a local level with housing providers.

#### Self Assessmenta

# Manager's Comments

Rating:

#### Supporting Chent Housing Outcomes

Takes are active, integrated approach to client engagement, which supports the Ministry's and the Government's performance targets:

- (makes an appropriate individual contribution, as agreed with their manager, to ensure clients have their housing needs met, and to help those who are able to move towards housing independence.
- provides support to meet individual housing needs, including the provision of information about Ministry products, services and processes.
- shows clear evidence that successful outcomes are achieved as a result of appropriate client engagement.
- where appropriate successful referrals are made to external agencies or other parts of the Ministry.

#### Self Assessment:

Manager's Comment:	Rating:
Key Deliverables	
<b>Timeliness</b> Supports the site to achieve service excellence standards:	
<ul> <li>Assessments - 95% of all housing assessments are completed within 5 working days last piece of information</li> </ul>	s of receipt of the
<ul> <li>Tenancy Reviews - 95% of clients are contacted every 28 days.</li> </ul>	
<ul> <li>provides a timely response to work requests and can adapt to shifting demands on a</li> </ul>	daily basis.
Self Assessment:	
Manager's Comment:	Rating:
Accuracy Supports the region/MSD to achieve service excellence standards:  90% of all client entitlements are correctly identified and processed:	
Self Assessment:	
Manager's Comment:	Rating:
Service Quality  Makes individual contribution to service quality by:  individual contribution to service quality monitor.  maintains excellent service in line with the national service standards.	
Self Assessment:	
Manager's Comment:	Rating:
ADDITIONAL KEY DELIVERABLES use this section to record any additional result areas or projects you have been responsible for du	ring the year
What is to be achieved:	and the second s
Self Assessment:	
Manager's Comment:	Rating:

SILLEGER	OIS - refer to		
	<u>ue de la comaca d</u>	JD∃G⊜NIIOI	guidelines

#### Ratings:

#### **Needs Development**

Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.

#### Competent

Demonstrates the appropriate behaviours.

#### Strength:

Always demonstrates the highest standards of behaviour across all situations and is a role model for others.

Success Factors	
People Skills  Demonstrates strong interpersonal skills.  Is confident when working with clients and colleagues.  treats all people with dignity and respect.  demonstrates an understanding of the views, beliefs, cultural perspectives and individual others.  demonstrates the ability to work positively with others to achieve outcomes stays calm, objective, and positive during difficult situations.  demonstrates the ability to resolve conflicts.	tuel differences to
Self Assessment:	
Manager's Comment:	Rating:
Communication Skills  Communicates clearly and fluently across all forms of communication.  tailors communication to the target audience, preparing adequately and utilising appropriate communicates clearly and simply (verbally and in writing) using appropriate grammar, is able to simplify complex issues when required  questions in detail, listen actively, and reserves judgment until all necessary information order to understand the situation.	style and language
Self Assessment:	
Manager's Comment:	Rating:

Partnerships and Relationship Management	
Builds a network of contacts both within and beyond Work and Income  seeks opportunities to collaborate and share information	
<ul> <li>participates as a positive team member in all working relationships</li> </ul>	
willingness to go the extra mile assisting others as necessary for the benefit of the wildentifies, develops and uses both internal and accessary for the benefit of the wildentifies.	der team
<ul> <li>identifies, develops and uses both internal and external networks that add value or powerful or partnership with internal and external contacts where appropriate, in order to and avoid duplication.</li> </ul>	rovide opportunities
and avoid duplication	J maximise services
has the respect of others and is a positive role model     contributes towards a positive word.	
<ul> <li>contributes towards a positive working and environment</li> <li>understanding the values, needs and aspirations of potential partners while successf</li> </ul>	tilly roproporting the
Ministry.	any representing the
Self Assessment:	2 /2
Manager's Comment:	Rating
	X n
Maximising Knowledge and Application	
Uses all resources available in order to deliver successful outsomes	
keeps knowledge of relevant business group specific and MSD products and services shares this knowledge with others	up to date and
• coaches colleagues through errors to ensure that future mistaked are avoided	
<ul> <li>understands and applies all relevant policies guidelines and standards</li> </ul>	
<ul> <li>positively supports and accepts new processes</li> <li>demonstrates the ability to self source information</li> </ul>	
actively seeks out opportunities to increase knowledge and learn new skills, and apple skills appropriately.	ioo noudu animad
• is solution focused, applies a attructured approach to problem solving and uses appro	priate techniques to
resolve issues.	
Self Assessment:	
Manager's Comment:	Rating:
	raang.
Being Accountable	
Takes ownership for quality of work.	
<ul> <li>takes responsibility for own workload and appreciates how own behaviour impacts up</li> </ul>	on others
<ul> <li>(is reliable, self-disciplined and proactive</li> <li>readily accepts feedback on performance and applies feedback on the job</li> </ul>	
manages time effectively to ensure delivery of the best possible service	
<ul> <li>maintains a strong client focus through periods of change and a positive attitude wher</li> </ul>	ı working with
changes	Ū
<ul> <li>exercises good judgment and bases all decision on reasoned analysis</li> <li>thinks about what could go wrong and effectively manages as it relates to risk</li> </ul>	
<ul> <li>consistently produces high quality work.</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
	1

Success Factors

#### Success Factors

#### **Public Service Integrity**

Is committed to serving the people of New Zealand with honesty and integrity.

- communicates openly and honestly with others
- inspires trust in others, and behaves fairly and ethically at all times
- · respects the confidentiality of client and Ministry information
- demonstrates and applies an understanding of the Ministry's vision, purpose and values
- adheres to the Ministry's Code of Conduct
- models the highest standards of public service behaviour and probity
- always acts to enhance the Ministry's reputation.

# Self Assessment: Manager's Comment: Rating:

# Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

#### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

#### Outstanding

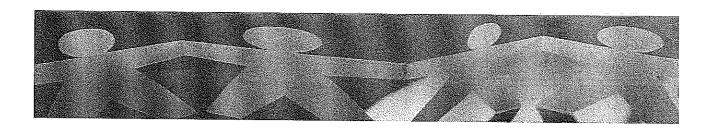
Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

Key Successes and Highlights	
Self:	
Banana	
Manager's:	
	( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( ) ( )
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:      Key Deliverable     Success Factor     Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed



# Performance Development and Assessment

Staff Member's Name:	
Position:	Customer Service Representative
Manager's Name:	
Review Period:	
Employees Comments:	
Managers Comments:	
Date Key Deliverables agreed:	
(Manager)	(Staff Member)
Date Performance Review Com	pleted:
Performance Review Agreed: (Refer to page 23 of the guideling)	nes) Yes / No
(Manager)	(Staff Member)
Overall rating:	

# Key Deliverables – refer page 8 of guidelines

#### Ratings:

#### Needs Improvement

Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.

#### Substantially Achieved

Key deliverable and measure(s) is mostly met. Considerable progress has been made.

#### **Expectation Achieved**

Key deliverable and agreed measure(s) met.

#### Exceeded Expectation

Exceeded the key deliverable and measure(s).

Key Deliverables			
Client Service			
<ul> <li>ensures client referrals meet contact centre standards and requirements</li> <li>all clients needs are met and resolved on initial contact where appropriate — one call resolution</li> <li>feedback indicates referrals are accurate</li> <li>provides clients with up to date information on products and services in accordance with relevant legislation and policy</li> <li>clients are provided with access to their full and correct entitlements according to their needs adheres to relevant legislation and policy</li> <li>provides initial screening to determine clients' eligibility for social housing and general housing-related ontions and advise.</li> </ul>			
options and advice.  Self Assessment:			
Manager's Comment:	Rating:		
Client Management  nanages elent phone calls confidently and professionally ensuring outcomes meet calls follow a logical progression, remain on track and focused  uses appropriate tone and language to support client interactions  actively listens to clients and checks for understanding, questioning and paraphrasir ensures processing actions support client outcomes  manage outbound calls confidently and professionally to meet the intent of the camp	ng appropriately		
Self Assessment:			
Manager's Comment:	Rating:		

Key Deliverables	
Use of Resources  utilises resources to ensure information and decisions are cuses phone system effectively uses applications to record information and fully inform clienuses tools and resources to ensure efficiency in the job	•
Self Assessment:	
Manager's Comment:	Rating:
Timeliness  • meets contact centre call handling time target	
Self Assessment:	
Manager's Comment:	Rating:
right Time/Right Place  meets to ster requirements and understands the impact of necessary accounts for time off the phones during the day meets 100% achierence target meets 92% compliance target	not complying to the roster
Self Assessment:	
Manager's Comment:	Rating:

meets contact centre call assessment target of 95%     Meets contact centre action assessments target of 95%  Self Assessment:  Manager's Comment:  Rating:  Client Satisfaction     makes an individual contribution to client satisfaction results on the contact centre with Work and Income Service Standards     ensures effective resolution of client enquiries  Self Assessment:  Manager's Comment  Rating:
Manager's Comment:  Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Manager's Comment  Rating:
Self Assessment:  Manager's Comment:  Client Satisfaction  • makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Manager's Comment:  Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in the with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Manager's Comment:  Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in the with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Manager's Comment:  Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in the with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
Client Satisfaction  • makes an individual contribution to client satisfaction results on the contact centre in line with Work and Income Service Standards  • ensures effective resolution of client enquiries  Self Assessment:  Rating:
<ul> <li>makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards</li> <li>ensures effective resolution of client enquiries</li> </ul> Self Assessment: <ul> <li>Rating:</li> </ul>
makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards     ensures effective resolution of client enquiries  Self Assessment:  Rating:
makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards     ensures effective resolution of client enquiries  Self Assessment:  Rating:
<ul> <li>makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards</li> <li>ensures effective resolution of client enquiries</li> </ul> Self Assessment: <ul> <li>Rating:</li> </ul>
<ul> <li>makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards</li> <li>ensures effective resolution of client enquiries</li> </ul> Self Assessment: <ul> <li>Rating:</li> </ul>
<ul> <li>makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards</li> <li>ensures effective resolution of client enquiries</li> </ul> Self Assessment: <ul> <li>Rating:</li> </ul>
Income Service Standards  ensures effective resolution of client enquiries  Self Assessment:  Manager's Comment:  Rating:
ensures effective resolution of client enquiries  Self Assessment:  Manager's Comment:  Optional Key Deliverable  Rating:
Self Assessment:  Manager's Comment:  Rating:
Manager's Comment:  Rating:  Optional Key Deliverable
Manager's Comment:  Rating:  Optional Key Deliverable
Manager's Comment:  Rating:  Optional Key Deliverable
Optional Key Deliverable
Optional Key Deliverable
Optional Key Deliverable
Optional Key Deliverable
Optional Key Deliverable
Optional Key Deliverable
Online Santiges as applicable)
Online general as applicable)
ability to efficiently diagnose a client's online services issue by using effective communication skills and
referring to the trouble shooting knowledge base
ensures clients are provided with an effective solution to the online services issue they have experienced
<ul> <li>escalates Online Services issues, that require an IT intervention, through the agreed escalation</li> </ul>
processes as outlined in the Online Services knowledge base.
manage contacts accurately and in a timely and effective manner.
Self Assessment:
Self Assessment:
Self Assessment:
Self Assessment:
Self Assessment:  Manager's Comment:  Rating:

	itional Key Deliverable			
Qι	ality Assurance/ Buddying/ Expert (as applicable)	The Control of the Co		
9	quality assurance/ buddying/ expert (as applicable)			
	completes call evaluations and checks work according to site or national quality assurance plans			
6	provides motivational and constructive feedback and coaches others based on quality checks ensuring			
	learning takes place, including follow up			
•	produces timely and informative reports and analysis of quality results and/or training required	g needs when		
6	prepares analysis of quality trends and issues when required			
•	provides testing/checking of work through sampling and at the direction of managem	nent		
<b>c</b>	identifies and recommends continuous improvements to processes and procedures system)	(via the alerts		
8	proactively maintains a service quality improvement culture			
•	identifies individual training needs and reports to managers			
•	is a role model in the work place			
•	provides customer service representatives with correct information in accordance with	th policies and		
	procedures followed within the contact centre			
•	ensures all quality data is entered accurately			
•	contributes to projects, workshops and other activities that improve the particular control	of the contact		
	centre	100		
Sel	f Assessment:			
	nager's Comment:	Rating:		
AD	DITIONAL KEY DELIVERABLE			
use	this section to record any additional result areas or projects you have been responsible for dur	ing the year		
Wh	at is to be achieved:			
Sel	f Assessment:			
		ı		
Ma	nager's Comment:			
-		Rating:		
	Kating:			
(				

Ratings:	COSS   CCC   S - refer to page 11 or	guidelines		
Needs Development	Competent	Strength		
Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.	Demonstrates the appropriate behaviours.	standards of	onstrates the highest behaviour across all d is a role model for	
Success Factors				
People Skills	38 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7 7	erita (m. 1995), ing interess (1994-1996), potential ang		
Demonstrates strong interpersonal				
<ul><li>is confident when working with cl</li><li>treats all people with dignity and</li></ul>				
	respect of the views, beliefs, cultural persp	ectives and individ	ual differences in	
	positively with others to achieve ou	toomes		
<ul> <li>stays calm, objective, and positive</li> </ul>	re during difficult situations			
<ul> <li>demonstrates the ability to resolve</li> </ul>			2	
		$\sim \sim $	· 	
Self Assessment:				
Manager's Comment:			Rating:	
Communication Skills				
Communicates clearly and fluently agross all forms of communication.				
<ul> <li>tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> </ul>				
is able to simplify complex issues when required				
<ul> <li>questions in cleral. Histens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>				
Sixti symposition the situation				
Self Assessment:				

Manager's Comment:

Rating:

Success Factors	
Partnerships and Relationship Management  Builds a network of contacts both within and beyond Work and Income  seeks opportunities to collaborate and share information  participates as a positive team member in all working relationships  willingness to go the extra mile assisting others as necessary for the benefit of the wid  identifies, develops and uses both internal and external networks that add value or proportunities	ovide
<ul> <li>works in partnership with internal and external contacts where appropriate, in order to services and avoid duplication</li> <li>has the respect of others and is a positive role model</li> <li>contributes towards a positive working and environment</li> <li>understanding the values, needs and aspirations of potential partners while successfuthe Ministry.</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
Maximising Knowledge and Application  Uses all resources available in order to deliver successful outcomes.  • keeps knowledge of relevant business group specific and MSD products and services shares this knowledge with others  • coaches colleagues through errors to ensure that future mistakes are avoided  • understands and applies all relevant policies, guidelines and standards  • positively supports and accepts new processes  • demonstrates the ability to self source insimilation  • actively seeks out opportunities to increase knowledge and learn new skills, and applies skills appropriately  • is solution focused applies a structured approach to problem solving and uses appropriate to resolve issues  Self Assessment:	es newly gained
Manager's Comment:	Rating:

Success Factors	
Being Accountable  Takes ownership for quality of work.  takes responsibility for own workload and appreciates how own behaviour impacts up is reliable, self-disciplined and proactive  readily accepts feedback on performance and applies feedback on the job manages time effectively to ensure delivery of the best possible service  maintains a strong client focus through periods of change and a positive attitude whe changes  exercises good judgment and bases all decision on reasoned analysis  thinks about what could go wrong and effectively manages as it relates to risk  consistently produces high quality work	
Self Assessment:	
Manager's Comment:	Rating:
Public Service Integrity Is committed to serving the people of New Zealand with honesty and integrity.  communicates openly and increstly with others  inspires trust in others, and behaves fairly and ethically at all times  respects the confidentiality of client and Ministry information  demonstrates and applies an understanding of the Ministry's vision, purpose and value  adheres to the Ministry's Code of Conduct  models the highest standards of public service behaviour and probity  always acts to enhance the Ministry's reputation	es
Self Assessment:	
Manager's Comment:	Rating:

Optional Success Factors	
Training and Facilitation	Tables and selection to the Albert of the Selection of the
(please note this success factor is optional not applicable to all roles)	
<ul> <li>implements a structured planning framework that meets the training demands of the</li> </ul>	service
centre/region	00,1100
uses an appropriate variety of delivery methods to effectively facilitate learning	
<ul> <li>ensures staff or clients are given the opportunities and necessary support to learn, are</li> </ul>	nd apply their
learning effectively	na apply alon
applies an understanding of adult learning principles and adult learning styles	
<ul> <li>evaluates whether the transfer of learning has occurred</li> </ul>	
<ul> <li>undertakes internal marketing of training opportunities where appropriate</li> </ul>	
Self Assessment:	
	•
	^ -
Manager's Comment:	
	To at it was
	Rating
_ ~// >	1000
	<del>\ \\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\</del>
Marketing and Negotiation	7/ 1
(please note this success factor is optional not applicable to all votes)	<b>→</b>
markets and promotos products and consisce to extend to the last	
identifies and prioritises areas of need (focusing on disadvantaged gient/ non-client be develops a plan around delivery of marketing at the control of	sace) and
develops a plan around delivery of marketing activities	ase), and
targets marketing activities to where greatest opportunities exist	
· effectively negotiates with internal and external parties to maximise opportunities for o	our clients
<ul> <li>develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities to the develops and maintains key relationships to ensure opportunities.</li> </ul>	our chemis
Self Assessment:	
	i
Self Assessment:	
Self Assessment:	Rating:
Self Assessment:	Rating:
Self Assessment:	Rating:
Self Assessment:  Manager's Comment:	Rating:
Manager's Comments  Leading People	Rating:
Manager's Comments  Leading People (applies only to people with staff management responsibilities)	Rating:
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders his by creating a core sense of purpose and vision	Rating:
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders his by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively	
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders his by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa	
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback on performation in a ware of individuals' strengths and uses them as a basis for building capability	nce
Manager's Comments  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performations are of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best we	nce
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders hip by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performations of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance	ince vhile also
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision  identifies difficult issues and opportunities and manages these proactively  clearly communicates expectations and provides coaching and feedback on performation is aware of individuals' strengths and uses them as a basis for building capability  encourages a challenging environment where people are motivated to do their best, we considering work life balance  leads and develops effective teams to maximise the contributions of members to achie	ince vhile also
Manager's Comments  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performations are of individuals strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achieve the contributions of the con	ince while also eve successful
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult ssues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa aware of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes provides a healthy and safe work environment for their team(s) including completion of	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa is aware of individuals' strengths and uses them as a basis for building capability considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks	ince while also eve successful
Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult ssues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa aware of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes provides a healthy and safe work environment for their team(s) including completion of	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa is aware of individuals' strengths and uses them as a basis for building capability considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders his by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa is aware of individuals' strengths and uses them as a basis for building capability considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leaders his by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa is aware of individuals' strengths and uses them as a basis for building capability considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa wavel of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achiev outcomes provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks  Self Assessment:	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa is aware of individuals' strengths and uses them as a basis for building capability considering work life balance leads and develops effective teams to maximise the contributions of members to achieve outcomes  provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks	ince while also eve successful
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa wave of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achiev outcomes provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks  Self Assessment:	ince vhile also eve successful of the health and
Manager's Comment:  Leading People (applies only to people with staff management responsibilities)  provides leadership by creating a core sense of purpose and vision identifies difficult issues and opportunities and manages these proactively clearly communicates expectations and provides coaching and feedback on performa wavel of individuals' strengths and uses them as a basis for building capability encourages a challenging environment where people are motivated to do their best, we considering work life balance leads and develops effective teams to maximise the contributions of members to achiev outcomes provides a healthy and safe work environment for their team(s) including completion of safety scheduler tasks  Self Assessment:	ince vhile also eve successful

# Overall Performance Assessment – refer to page 20 of the guidelines

Assign a final overall rating of performance. Equal weighting is usually given to the deliverables and success factors. Apply the rating that most closely matches the overall contribution.

#### Needs Improvement

Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.

#### **Expectations Achieved**

Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.

#### **Exceeding Expectations**

Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.

#### Outstanding

Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.

<u> </u>	\$\\\
Key Successes and Highlights	J)
Self:	
· · · · · · · · · · · · · · · · · · ·	
Manager's:	
	i
Overall Rating Achieved:	

# Individual Development Plan - refer to page 13 of the guidelines

Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager during coaching sessions, update or add to it as necessary, and record when an action has been completed.

Areas for development     On the job development/     assistance required     Knowledge and Skills required to perform role     Tools required to perform role     Development/Assistance towards Future Goals	Link to:  Key Deliverable Success Factor Career Goal	Agreed action responsibilities	Who will do it? By When?	Date Completed
				_
			•	

coaching notes