

## Performance Development and Assessment

Staff Member's Name:	
Position:	Integrated Services Case Manager
Manager's Name:	

Review Period:	
----------------	--

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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 use these services
- contributes positively to the successful implementation of national, regional and site strategies.

#### Self Assessment:

#### Manager's Comment:

#### Rating:

#### Client Development Activities

- identifies clients with multiple and complex needs to ensure they meet the criteria for Integrated Service Response (ISR) and refers clients who do not require an integrated services response to another appropriate service provider (eg a case manager, external agency) in a professional and timely manner
- develops and implements comprehensive integrated services plans for clients that demonstrate a clear link between assessment, selected intervention, outcomes to be achieved and in consultation with appropriate stakeholders
- ensures engagement with clients, boundary setting, and gaining agreement on the progress and steps of ISR plan are managed effectively
- identifies risks related to the client's case and manages risk in accordance with Ministry policy and practices
- plans are regularly reviewed and kept current to reflect the clients current needs/circumstances
- case reviews indicate appropriate interventions that demonstrate a clear link to achievement of agreed outcomes
- ensures effective transition of clients from ISR to less intensive support as clients' needs lessen
- makes appropriate referrals to other agencies
- contributes to the successful implementation of national and regional strategies, contributing positively to regional performance

#### Self Assessment:

#### Manager's Comment:

#### Rating:

<b>Key Deliverables</b>	
<b>Client Outcomes</b> Takes an active approach to client engagement which supports Work and Income's and the Government's performance targets: <ul style="list-style-type: none"> <li>• clients receive the right level of support and are committed to achieving goals</li> <li>• child development and safety needs are met</li> <li>• 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</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Relationship Management/Networking</b> <ul style="list-style-type: none"> <li>• develops and maintains effective links with a range of other people and agencies to maximise services built on interagency collaboration.</li> <li>• identifies and engages with appropriate stakeholders in developing and delivering plans</li> <li>• works collaboratively with community and government agencies to provide joined up solutions that contribute to the successful outcomes for the client</li> <li>• ongoing liaison and exchange of information with other agencies in respect to services, policies and operational processes, and any changes that occur.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Timeliness</b> <ul style="list-style-type: none"> <li>• supports the site to achieve service excellence standards: <ul style="list-style-type: none"> <li>• 90% of all benefit entitlement assessments in the service centre are completed within 5 days of receipt</li> <li>• 95% of job seekers with current work obligations have a RecruitMe profile completed within 24 hours of granting a new application</li> </ul> </li> <li>• client outcomes as contained in the client's integrated services plan are achieved within agreed timelines</li> <li>• all mandatory process for recording client information is completed in the required time frame.</li> <li>• 95% - 100% of all clients who are enrolled in CST have an assessment completed within four weeks</li> <li>• ISR Reports submitted within required timeframes</li> <li>• referrals to other agencies/service providers are made in a timely manner</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

**Key Deliverables****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 standards
- Reports meet expected quality standards
- Maintains complete, concise and up to date client records and ensures all required documentation eg consent forms are completed within agreed timeframes and to agreed quality standards
- Information in client service tool (CST) electronic case management system is complete and accurate.

**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 during the year*

**What is to be achieved:****Self Assessment:****Manager's Comment:****Rating:**

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

**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:**

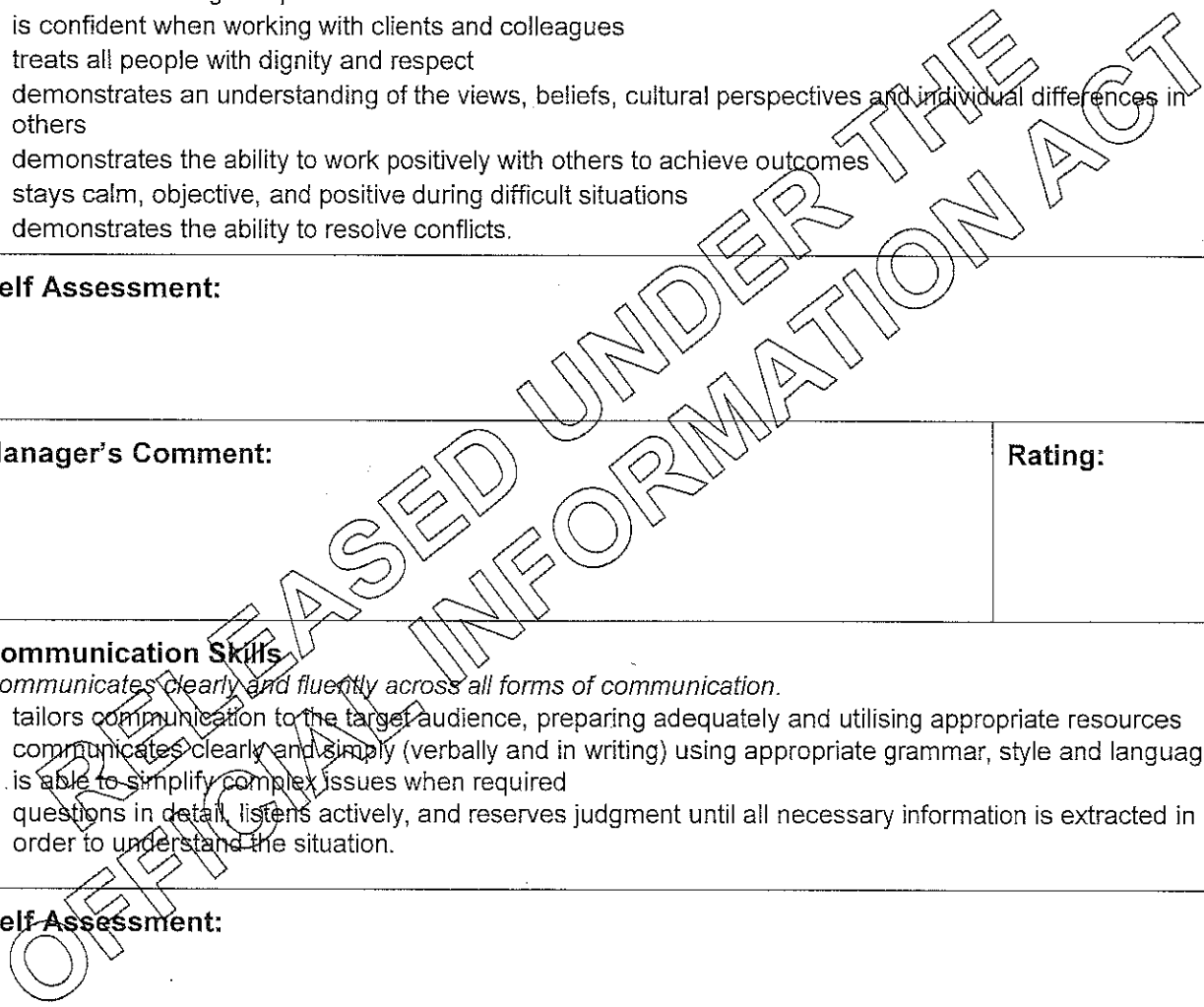
<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------



## 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:**

**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 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:**

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

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

RELEASED UNDER THE OFFICIAL INFORMATION ACT



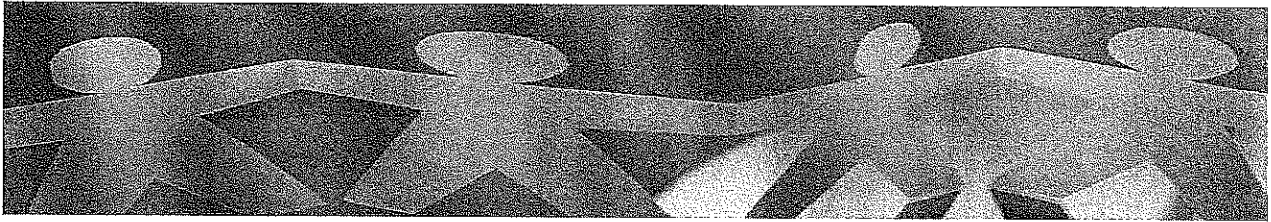
**Individual Development Plan** – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Executive Administrator Contact Centre
Manager's Name:	

Review Period: \_\_\_\_\_ to \_\_\_\_\_

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**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 procedures.

**Self Assessment:**

<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
----------------------------------	-----------------------

**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.

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>Finance</b>	
<p><b>Take responsibility for financial administration for the contact centre and deliver an accurate service, according the Ministry and financial standards, to meet specified timeframes and the needs of the Financial Analyst. This includes:</b></p> <ul style="list-style-type: none"> <li>• updating forecast and advising CCM/FA as and when required</li> <li>• updating administration costs for annual budget</li> <li>• updating and maintaining salary calculator (if applicable)</li> <li>• completing requisitions (1 day = non urgent, 2 hours = urgent), reports, assets stock take, accruals and journals</li> <li>• maintaining petty cash records (if applicable)</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>Human Resources</b>	
<p><b>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:</b></p> <ul style="list-style-type: none"> <li>• completing checking and audits as required e.g.: <ul style="list-style-type: none"> <li>○ Payroll (weekly and monthly)</li> <li>○ GAS reports checked and signed off (fortnightly)</li> <li>○ personnel files checks (quarterly and bi-annually)</li> </ul> </li> </ul>	

- 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:**

**Contribution to Projects**

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:**

**Manager's Comment:** **Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:**

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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
- asks 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:**

**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 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:**

**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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

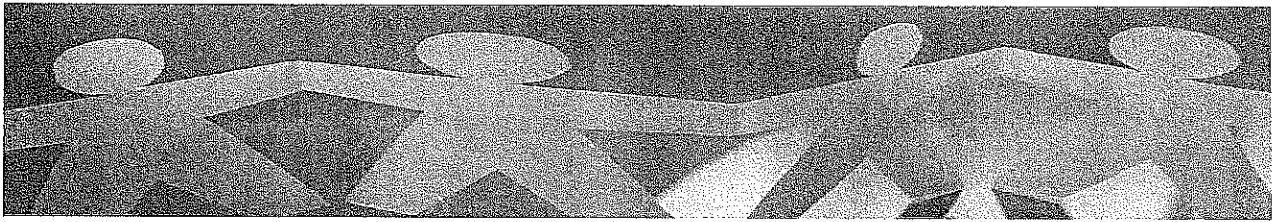
RELEASED UNDER THE OFFICIAL INFORMATION ACT

## 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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach 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 agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### PROCESSING

- provides technical processing advice and expertise to internal business unit staff managers
- contributes to the development of innovative enhancements and changes that result in improvements to processing and procedures being made
- provides a full range of processing functions for the contracts team as well as Work and Income services centres
- provides a centralised contact point for queries

**Self Assessment:**

**Manager'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 than 4 weeks outstanding

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Accuracy**

- ensures that all client information from the providers is processed correctly and work is free from errors or omissions
- processes all enterprise allowance applications correctly on SOLO and ensures work is free from errors or omissions
- adheres to systems in place to minimise risk and security breaches
- completes all processing to required departmental standards and in line with departmental policies and procedures
- meets all reporting and monitoring requirements

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**SERVICE EXCELLENCE**

**Client satisfaction**

- maintains service excellence standards as per the service excellence standards guidelines

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------



**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:**

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:**

**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 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:****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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**Individual Development Plan** – refer to page 13 of the guidelines

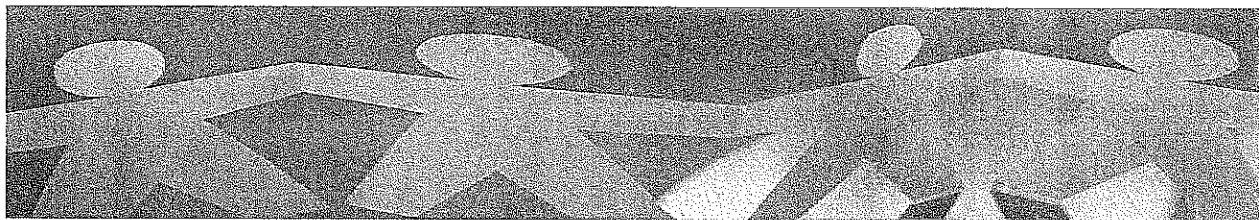
Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager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

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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 agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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

#### 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:

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Capability development**

**Supports Contact Centre Training Manager to raise individual and site capability that results in performance improvement. Activities include:**

- Promoting training activities, opportunities and awareness to staff to help build a capable workforce
- Proactively identifies areas of development for staff and contributes to the planning and development of strategies and materials for improving performance and quality
- Maintaining data bases that record Customer Service Representative capability and development

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Project Delivery**

**Supports the Contact Centre Training Manager with the training delivery aspects of key project work, in line with the required timeframes, standards and techniques to ensure accurate information is provided to staff and project deliverables are met. This includes training on:**

- new technologies
- business applications
- other planned activities as specified

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

<b>Qualification and assessment</b>	
<p><b>Assists the Contact Centre Training Manager to deliver qualification and assessment activities in accordance with required standards. Ensures candidates complete requirements within training Agreement timeframes. This includes:</b></p> <ul style="list-style-type: none"> <li>• Ensuring 80% of staff enrolled in a qualification programme complete the qualification</li> <li>• Delivering qualification workshops in accordance with scheduled times allocated by the Operations team</li> <li>• Liaising with Operations Team to organise catch up sessions where needed for staff</li> <li>• Liaising with Service Managers regarding candidates progress</li> <li>• Providing support and coaching for candidates completing qualifications</li> <li>• Attending Learning State forum in compliance with registration requirements</li> <li>• Maintaining on-going development for assessment and peer moderation as required</li> <li>• Working with regional and national assessors to ensure consistency</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>National level contribution</b>	
<p><b>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 &amp; Income and Contact Centre Strategic Plan. This includes:</b></p> <ul style="list-style-type: none"> <li>• contributing positively to national consultation, planning, and decision making processes for training.</li> <li>• assisting with the preparation of national training materials</li> </ul>	

- undertaking national training design and development work
- undertaking networking with other contact centre sites, and sharing knowledge and experience
- supporting implementation of the contact centre strategic plan and contributing 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:**

- 
- 
- 
- 
- 

**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b></p> <p><i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:****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 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 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 change
- 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:****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 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:**

**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**

(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

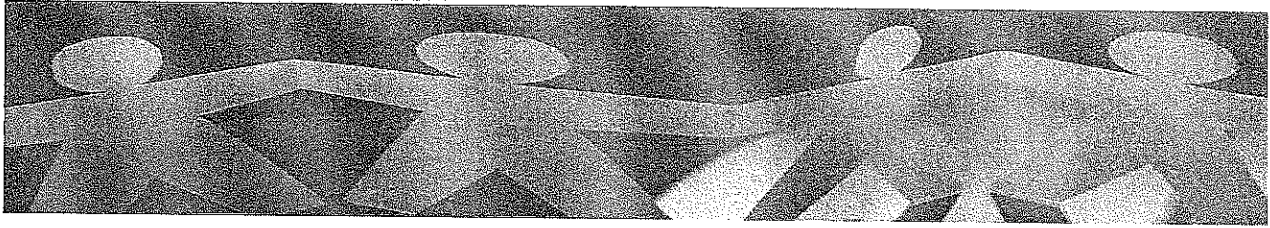
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Training Manager Contact Centre
Manager's Name:	

Review Period: \_\_\_\_\_ to \_\_\_\_\_

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**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 planning and decision making
- providing day-to-day support, coaching, and guidance to the Contact Centre Trainer and feedback to the Contact Centre Manager

**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

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>Project Delivery</b>	
<p><b>Manages the training delivery aspects of key project work, in line with required timeframes, standards, and techniques to ensure accurate information is provided to staff and project deliverables are met. This includes training on:</b></p> <ul style="list-style-type: none"> <li>• new technologies</li> <li>• business applications</li> <li>• other planned activities as specified</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>Qualification and assessment</b>
<p><b>Delivers qualification and assessment activities in accordance with required standards. Ensures candidates complete requirements within training Agreement timeframes. This includes:</b></p> <ul style="list-style-type: none"> <li>• Ensuring 80% of staff enrolled in a qualification programme complete the qualification</li> <li>• Delivering qualification workshops in accordance with scheduled times allocated by the Operations team</li> <li>• Liaising with Operations Team to organise catch up sessions where needed for staff</li> <li>• Maintaining database record of candidates progress</li> <li>• Maintain and update resources as required to support the qualification programme</li> </ul>

- 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

**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 networking 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:

- 
- 
- 
- 
- 

Self Assessment:

Manager's Comment:

Rating:

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:****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 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:****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 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 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:**

**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 scheduler 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:
--------------------	---------

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

**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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT



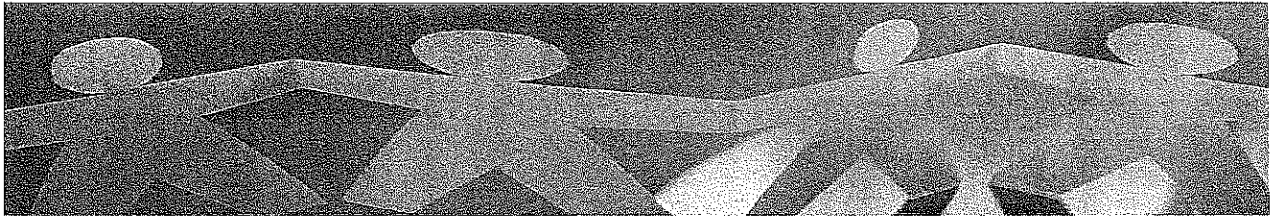
## Individual Development Plan — refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Ⓢ Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Intensive Client Support Manager
Manager's Name:	

Review Period:	
----------------	--

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

Key Deliverables	
<p><b>Participation in Business Practices</b></p> <ul style="list-style-type: none"> <li>actively and appropriately participates in new initiatives in the business</li> <li>promotes online and other self-service channels to clients and influences clients to use these services</li> <li>contributes positively to the successful implementation of national, regional and site strategies</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Client Development Activities</b></p> <ul style="list-style-type: none"> <li>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 stakeholders</li> <li>identifies risks related to the client's case and manages risk in accordance with Ministry policy and practices</li> <li>plans are regularly reviewed and kept current to reflect the clients current needs/circumstances</li> <li>the proportion of clients with current work obligations that have a completed RecruitMe profile will be between 95-100%</li> <li>makes appropriate referrals to other agencies</li> <li>contributes to the successful implementation of national and regional strategies, contributing positively to regional performance</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

**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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Relationship Management/Networking**

- develops and maintains effective links with a range of other people and agencies to maximise services built on interagency collaboration
- identifies and engages with appropriate stakeholders in developing and delivering plans
- work collaboratively with community and government agencies to provide joined up solutions that contribute to the successful outcomes for the client
- on-going liaison and exchange of information with other agencies in respect to services, policies and operational processes, and any changes that occur.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Key Deliverables****Timeliness**

- supports the site to achieve service excellence standards:
  - 90% of all benefit entitlement assessments in the service centre are completed within 5 days of receipt.
- clients outcomes as contained in the client's employment plan are achieved within agreed timeliness
- 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

**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 standards
- The proportion of hardship assistance grants that meet the eligibility criteria will be between 95-100%
- reports meet expected quality standards
- maintains complete, concise and up to date client records and ensures all required documentation e.g. consent forms are completed within agreed timeframes and to agreed quality standards
- information in the engagement application tool is complete and accurate

**Self Assessment:****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:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

Success Factors	
<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Communication Skills</b>  <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> <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>• asks questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

## 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:**

**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 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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

Key Successes and Highlights
<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

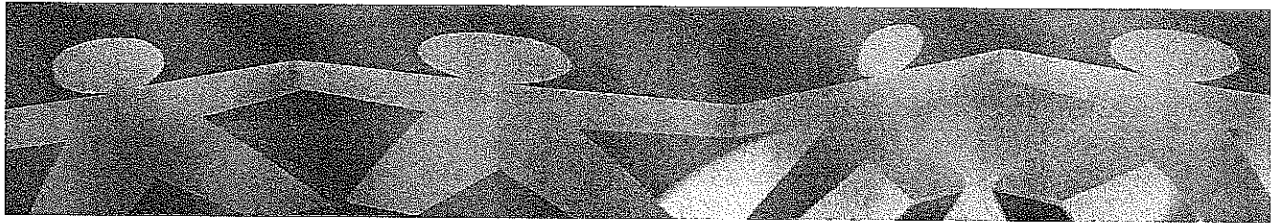
**Individual Development Plan** – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach coaching notes

RELEASED UNDER THE OFFICIAL INFORMATION ACT



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Health and Disability Coordinator
Manager's Name:	

Review Period:      to

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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
- Relevant health practitioners and disability service providers are satisfied with the level of support and 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 providers and proactively looks for solutions or escalates to manager as appropriate
- 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 processes where appropriate.

#### Self Assessment:

#### Manager's Comment:

#### Rating:

#### Timeliness

- Phone calls, emails and requests for assistance both internal and external are responded to within 24 hours
- Spreadsheet is maintained up to date and issues are fully documented
- Established reporting standards and timeframes are met

#### Self Assessment:

OFFICIAL INFORMATION ACT  
 UNDER THE ACT  
 INFORMATION RELEASED

<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Provider liaison</b> <ul style="list-style-type: none"> <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 the region</li> <li>• Undertakes proactive contact with health practitioners and disability service providers in order to build networks.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Specialist knowledge</b> <ul style="list-style-type: none"> <li>• Full application and use of legislation and policy in relation to client entitlement</li> <li>• Keeps up-to-date with current issues/research in the health and disability fields.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

OFFICIAL INFORMATION ACT  
 RELEASED UNDER THE ACT

**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:**

**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:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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
- asks 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:**

**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:**

**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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

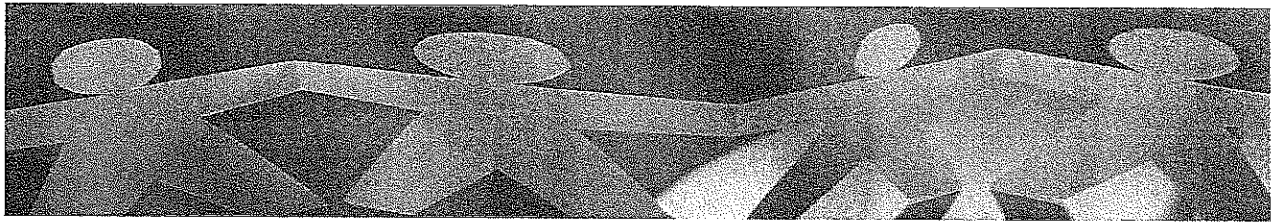
RELEASED UNDER THE OFFICIAL INFORMATION ACT

## 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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach coaching notes



**Performance Development and Assessment System**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Regional Disability Advisor
<b>Manager's Name:</b>	

Review Period:     to

<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
--------------------------------------	--

\_\_\_\_\_ (Manager)

\_\_\_\_\_ (Staff Member)

<b>Date Performance Review Completed:</b>	
<b>Performance Review Agreed:</b> <i>(Refer to page 23 of the guidelines)</i>	Yes / No

\_\_\_\_\_ (Manager)

\_\_\_\_\_ (Staff Member)

<b>Overall rating:</b>	
------------------------	--

OFFICIAL INFORMATION ACT  
RELEASED UNDER THE

**Key Deliverables** – refer page 8 of guidelines

**Ratings:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

<p><b>SERVICE EXCELLENCE</b></p>	
<p><b>Advisory service</b></p> <ul style="list-style-type: none"> <li>• Provides disability related advice to case managers on disabled clients</li> <li>• Provides professional advice and recommendations on specific client referrals, with a focus on sustainable employment outcomes</li> <li>• Where appropriate, matters are referred to the client's disability service providers and are successfully addressed</li> <li>• Keeps up-to-date with current research, issues and practices in the disability field</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Relationship management</b></p> <ul style="list-style-type: none"> <li>• Develops and maintain effective relationships with disability service providers and agencies that support this client group</li> <li>• Develops and maintains effective relationships with case managers and employment coordinators</li> <li>• Provides support to RDA's in other regions when required</li> <li>• Provides support to the RHA and HDC when required</li> <li>• Plays a key role in health and disability governance groups regionally and nationally</li> </ul>	
<p><b>Self Assessment:</b></p>	

<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Timeliness</b> <ul style="list-style-type: none"> <li>• Referrals for specialised assessment are made within 24 hours</li> <li>• Provides timely updates to regional and national office on client referrals</li> <li>• Timely reporting</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Planning</b> <ul style="list-style-type: none"> <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>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT



**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:**

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:**

**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 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:**

**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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

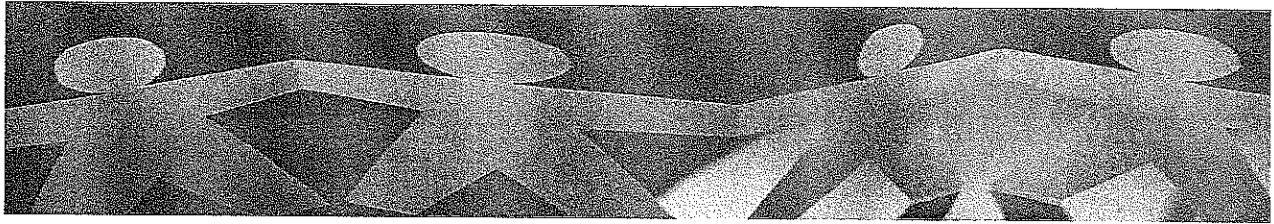
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach coaching notes





## Performance Development and Assessment System

Staff Member's Name:	
Position:	Claims Processing Officer
Manager's Name:	

Review Period:            to

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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 documentation 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/sponsors for Service Centres
- Ensuring all claims on confirmed status, in SOLO, are actioned as approved

**Measures of success include:**

- 95% of agreements and claims are actioned within 24 hours of receipt
- 95% of agreements and claims are processed accurately
- Progress reports submitted must be accurate
- Bank account changes are actioned with 24 hours of receipt

**Self Assessment:**

**Manager's Comment:**

**Rating:**

### 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

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>ADMINISTRATION / INFORMATION MANAGEMENT</b>	
<ul style="list-style-type: none"> <li>• Under take, within the Unit standard, written correspondence and documents to employers and Service Centre staff</li> <li>• Maintains full and accurate filing systems</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>CUSTOMER SERVICE AND SUPPORT</b>	
Identify and respond to customer (internal and external) information needs and queries through providing timely and accurate assistance and support to resolve the issue.	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

**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:**

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

**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:**

**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 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:**

**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 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**

*(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:**



**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

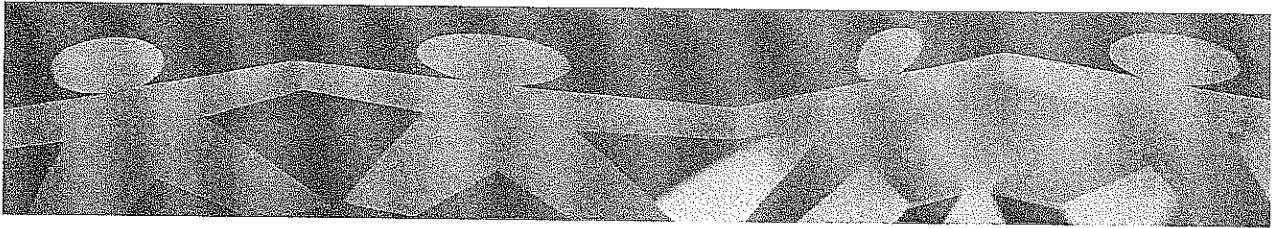
RELEASED UNDER THE OFFICIAL INFORMATION ACT

## 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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Regional Health Advisor
Manager's Name:	

Review Period:     to

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review Completed:	
Performance Review Agreed: <i>(Refer to page 23 of the guidelines)</i>	Yes / No

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Overall rating:	
-----------------	--

**Key Deliverables** – refer page 8 of guidelines

**Ratings:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**SERVICE EXCELLENCE**

- Advisory service**
- Provides health related advice to case managers on clients with ill health
  - Provides professional advice and recommendations on specific client referrals with a focus on sustainable employment outcomes
  - Where appropriate, matters are referred to the client's GP and are successfully addressed
  - Keeps up-to-date with current research, issues and practices in the health field

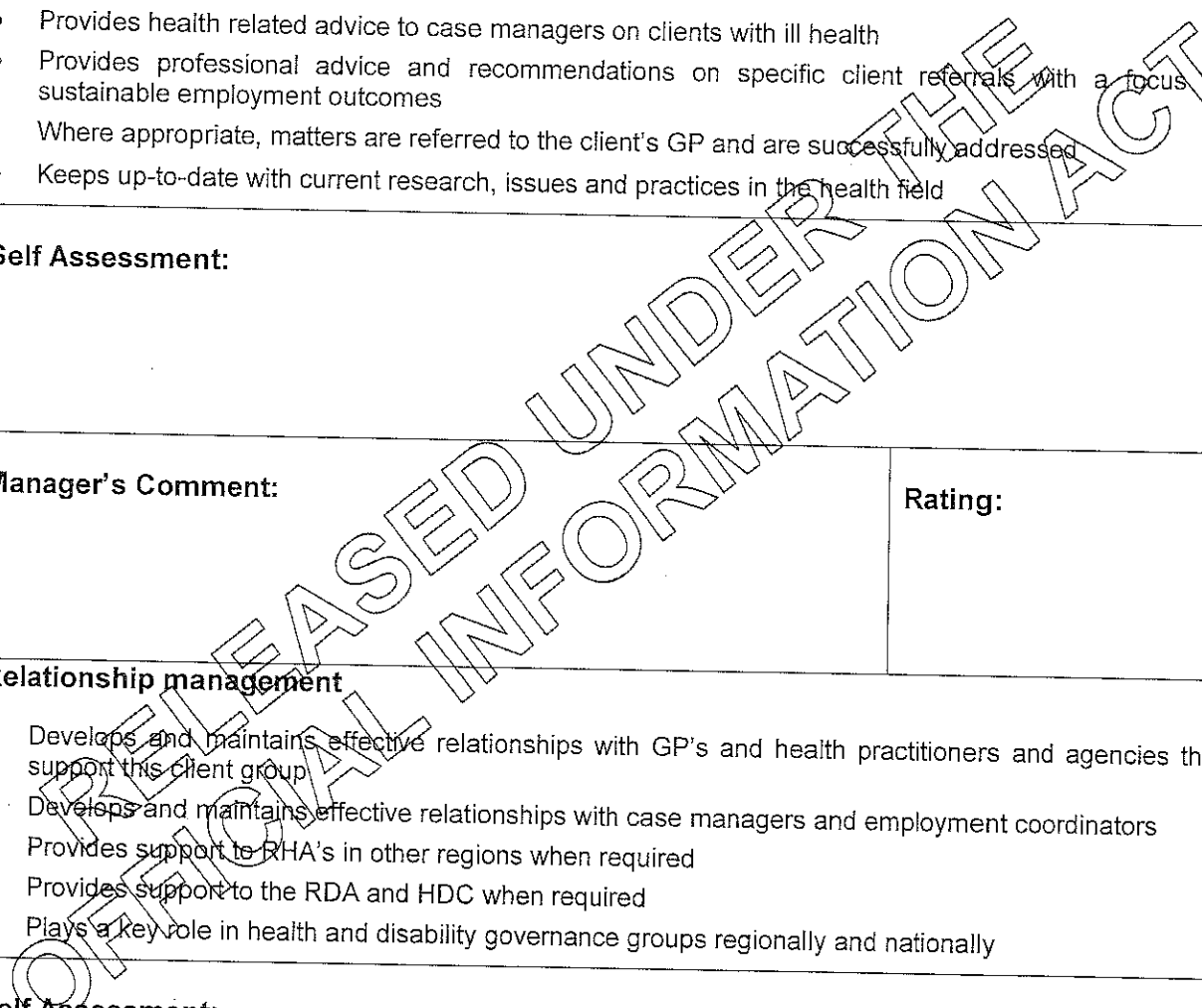
**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

- Relationship management**
- Develops and maintains effective relationships with GP's and health practitioners and agencies that support this client group
  - Develops and maintains effective relationships with case managers and employment coordinators
  - 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 nationally

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------



**SERVICE EXCELLENCE *continued...***

**Timeliness**

- Referrals for specialised health assessment or health interventions 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
- Participates in planning and supervision activities that involve other RHAs and/or with the Principal Health Advisor

**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:**

**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:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT



**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
- asks 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:****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:**

**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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

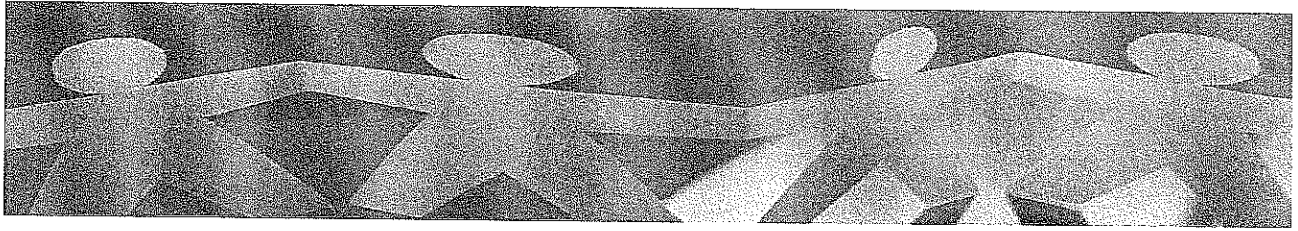
**Individual Development Plan** – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment

Staff Member's Name:	
Position:	Work Broker
Manager's Name:	

Review Period:	
----------------	--

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### Key Deliverables

#### Labour Market Activities:

- day to day activities are in line with national/regional strategies
- assess supply and demand needs on a daily basis (eg using vacancy management tool) to ensure appropriate vacancies are sourced which match our labour supply
- works in conjunction with the labour market team to develop and manage recruitment campaigns with significant local employers e.g. develop tailored recruitment packages and campaigns for local employers
- proactively advises clients and employers of relevant labour market information – this could include attending/facilitating seminars
- ensure activities that are more likely to result in employment for clients are prioritised over other activities.

#### Self Assessment:

#### Manager's Comment:

#### Rating:

#### Employer Engagement:

- contributes to a high quality end-to-end recruitment 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 referrals
  - contacting employers with open or on-hold vacancies once every 2 days (or as per the Service Level Agreement) to follow up on referrals made
  - follow up with employers about placements as appropriate
- proactively promotes 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**

Refers only to staff managing vacancies

- Proactively engage to increase the number of filled vacancies sourced by Work and Income Supporting Monitors:

Vacancy management timelines monitors:

- Initial search with 24 hours
- Final shortlist no later than 5 days
- Vacancies closed within 20 days, unless the needs of a business require longer timeframe
- completes wage subsidy templates within 5 working days of the employer's request for a subsidy with 90% completed accurately
- for work brokers with involvement in crown expenditure:
  - demonstrates a knowledge of budget targets and maximises expenditure within the site / cluster budget
  - carries out regular monitoring of clients we placed in crown projects in accordance with standards set by the Region
  - monitor early finishes of subsidies regularly and return savings to crown budget
  - provides evidenced explanations/mitigation strategies to support over or underspend

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Client Outcomes:**

- contributes to the region's targeted benefit register reductions, through profiling and placing clients into work
- accurate assessment of client's needs to determine what service delivery model best fits the clients' needs
- contribute to clients' work readiness e.g. feedback on CVs, personal presentation, interview techniques
- works with case managers to facilitate a smooth transition into work for clients as well as updating them on Labour Market intelligence

**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 during the year*

**What is to be achieved:**

- 
- 
- 
- 
- 

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**What is to be achieved:**

- 
- 

**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

## 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.

### 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 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:

#### 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:**

**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:**

## Success Factors

### 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 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:**

**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 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:**

**Marketing and Negotiation**

*(This is a key success factor for work brokers allocated to the function of mobile work broker)*

- 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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

<b>Key Successes and Highlights</b>	
<b>Self:</b>	
<b>Manager's:</b>	
<b>Overall Rating Achieved:</b>	

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

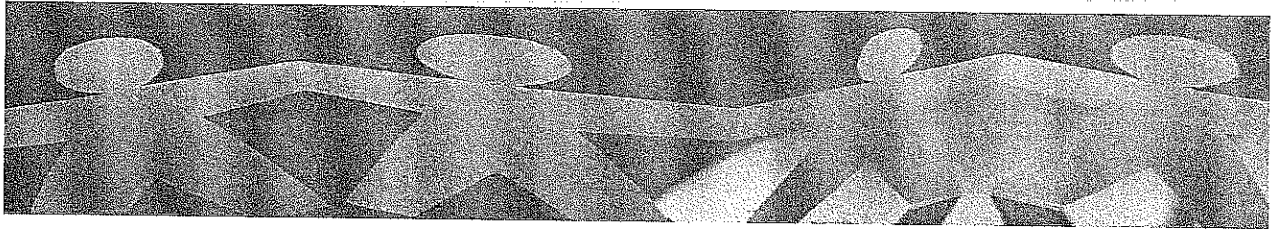
Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager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

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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 agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**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 for individual staff members
- identifies site trends/issues/concerns from quality checks or operational audits and develops solutions to address them, including preparing detailed training plans to address skill gaps
- undertakes observational and real-time checks for case managers (this includes case managers on 100% checks) in accordance with the Quality Blueprint 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

RELEASSED UNDER THE OFFICIAL INFORMATION ACT

- provides support for individual staff to ensure that clients are receiving effective case management, full and correct entitlement to benefit and support to achieve their goals
- supports and champions the service centre manager to implement change within the service centre
- observes interactions with clients and provides constructive feedback to learners on effective case management skills and identifies and updates Learning Plans in Totara LMS as appropriate

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Quality Culture**

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

- ensure new policies and practices are implemented effectively, if needed a plan is developed on issues/concerns and provided to the service centre manager
- champion the quality culture approach to staff
- all activities contribute to overall improvement in site service excellence results 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

RELEASED UNDER THE OFFICIAL INFORMATION ACT

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Accuracy</b> <ul style="list-style-type: none"> <li>• maintains accurate individual and team quality data</li> <li>• reports submitted to the service centre manager on the performance of case managers against expected quality standards</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Client satisfaction</b> <ul style="list-style-type: none"> <li>• 85% of the service centre's clients are "very satisfied" or "satisfied" with the service received (service centre result)</li> <li>• maintains service excellence standards as per the service excellence standards guidelines</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

OFFICIAL INFORMATION ACT  
 RELEASED UNDER THE

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:**

**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 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 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 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 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**

*(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 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:**



**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

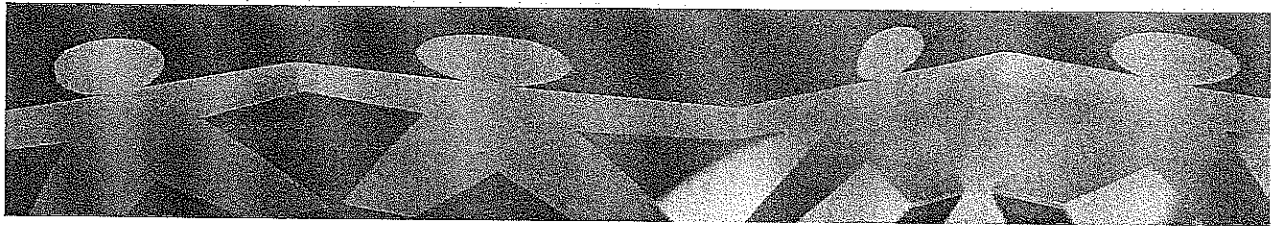
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Service Quality Officer
Manager's Name:	

Review Period:     to

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**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:**

**Manager's Comment:**

**Rating:**

**Quality Culture**

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

- improvements 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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**SERVICE EXCELLENCE**

**Timeliness**

- provides feedback to the site on the monthly regional checking results within agreed timeframes
- ensures that reports are submitted to the region/service centre within agreed timeframes
- ensures statistical data for coaching and achievement review purposes is completed and provided to service centre trainer within agreed timeframes
- ensures that corrections are completed within 48 hours

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Accuracy**

- maintains accurate individual and team quality data
- reports/updates on service excellence results that are submitted to Service Centre Manager, Service Centre Trainer and Operations Manager meet expected quality standards

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Client satisfaction**

- relevant service centre managers are satisfied with the level of support and service provided
- maintains service excellence standards as per the service excellence standards guidelines

RELEASED UNDER THE OFFICIAL INFORMATION ACT

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT



**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:****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 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:**

**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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

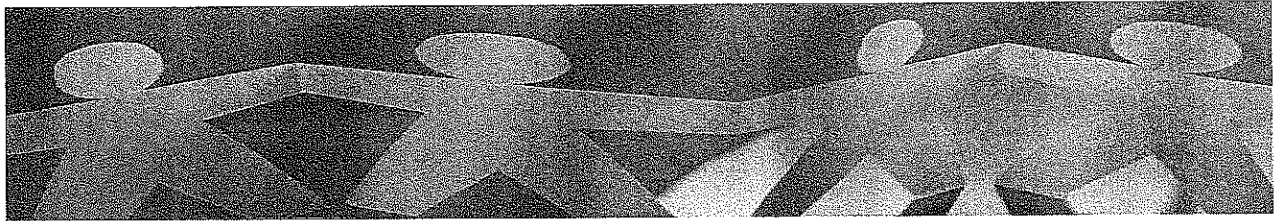
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment System

Staff Member's Name:	
Position:	Support Officer Contact Centre
Manager's Name:	

Review Period: \_\_\_\_\_ to \_\_\_\_\_

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
-------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

Date Performance Review 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:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

**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 mail to 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 timeframes (within 24 hours)
- Collecting and recording data for reporting purposes

**Self Assessment:**

<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
----------------------------------	-----------------------

**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



<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

<b>General administration</b>	
<p><b>Complete general administration duties in accordance with site requirements to support the efficient running of the site. This includes:</b></p> <ul style="list-style-type: none"> <li>• Checking on and ensuring that there are adequate supplies of stationery/forms/brochures available</li> <li>• Arranging travel to Ministry standards and in a timely manner</li> <li>• Completing photocopying within required timeframes</li> <li>• Ensuring that documents and electronic databases are stored and retrieved in accordance with the Ministries guidelines, including ensuring that all confidential information is securely stored</li> <li>• In the E.A's absence, assist with performing duties and tasks within timeframes determined at the time</li> <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> <li>• Keeping the tea station areas clean and tidy when visitors are on site and returning surplus crockery (if applicable)</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

### 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:**

**Rating:**

### 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, correspondence, appointment documentation and appointee forms sent to payroll, set up of personnel files and Staff CV access (if applicable)
- Ensuring 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-date and ensuring keys locked away in key register cabinet.
- Accurately allocating mobile and locker keys to new staff
- Organising and replenishing mobile cabinets for new staff
- Ordering name badges and desk plaques and checking them on arrival for new staff

**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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:****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 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:****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 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**

*(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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

**Key Successes and Highlights:**

<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

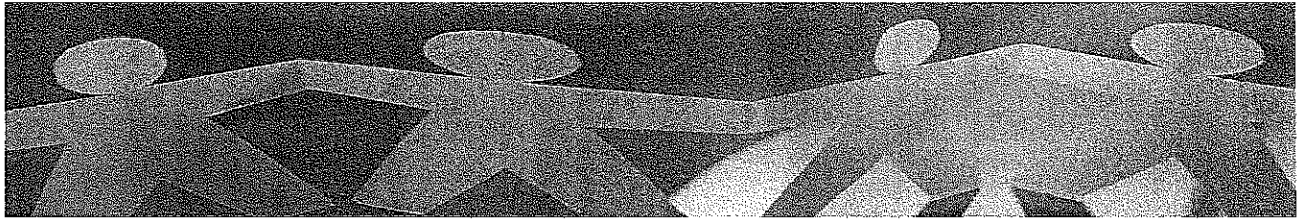
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



**Performance Development and Assessment**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Specialist Case Worker
<b>Manager's Name:</b>	

<b>Review Period:</b>	
-----------------------	--

<b>Employees Comments:</b>	

<b>Managers Comments:</b>	

<b>Date Key Deliverables agreed:</b>	
--------------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

<b>Date Performance Review Completed:</b>	
<b>Performance Review Agreed:</b> <i>(Refer to page 23 of the guidelines)</i>	Yes / No

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

<b>Overall rating:</b>	
------------------------	--

## Key Deliverables – refer page 8 of guidelines

### Ratings:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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 use these services
- contributes positively to the successful implementation of national, regional and site strategies.

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Client Development Activities**

- ensures clients are enrolled, identify current circumstances and other services or interventions required to achieve their education, training or work based goals
- develops and implements individualised client plans, meet regularly to review and provide ongoing mentoring support, advice and information appropriate to clients needs
- ensures client referrals are managed within agreed timeframes and successful outcomes achieved
- actively facilitates access to appropriate services and other assistance and ensures clients are participating to achieve outcomes
- promotes, brokers and refers participants to education, training, work based training or other development opportunities to ensure successful transition to independence
- ensures intensive case management is provided for young people, including coaching, mentoring and monitoring their achievement against their activities and update their plan as appropriate
- develops and maintains effective working relationships with relevant organisations, including government departments, schools, family and whanau, iwi and community groups, approved childcare providers, training providers and employers

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Key Deliverables****Client Outcomes**

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

- supports the site to achieve the site targets of more young people engaged in education, training or employment
- makes appropriate individual contribution to boosting skills and employment
- shows clear evidence that successful outcomes are achieved as a result of appropriate referrals to employment and training opportunities.

**Self Assessment:****Manager's Comment:****Rating:****Timeliness**

Supports the site to achieve service excellence standards:

- ensures client referrals are managed within agreed timeframes
- 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 timeframes
- provide a timely response to work requests and can adapt to shifting demands on a daily basis.

**Self Assessment:****Manager's Comment:****Rating:****Accuracy**

- supports the site to achieve service excellence standards
- ensures client records are complete, concise, up to date and meets expected quality standards.

**Self Assessment:****Manager's Comment:****Rating:**

<b>Key Deliverables</b>	
<b>Service Quality</b> Makes individual contribution to service quality by: <ul style="list-style-type: none"> <li>• individual contribution to service quality monitor</li> <li>• maintains excellent service in line with the national service standards.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>ADDITIONAL KEY DELIVERABLES</b> <i>use this section to record any additional result areas or projects you have been responsible for during the year</i>	
<b>What is to be achieved:</b>	
•	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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.

**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 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:**

**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:**

**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 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:**



**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

<b>Key Successes and Highlights</b>	
<b>Self:</b>	
<b>Manager's:</b>	
<b>Overall Rating Achieved:</b>	

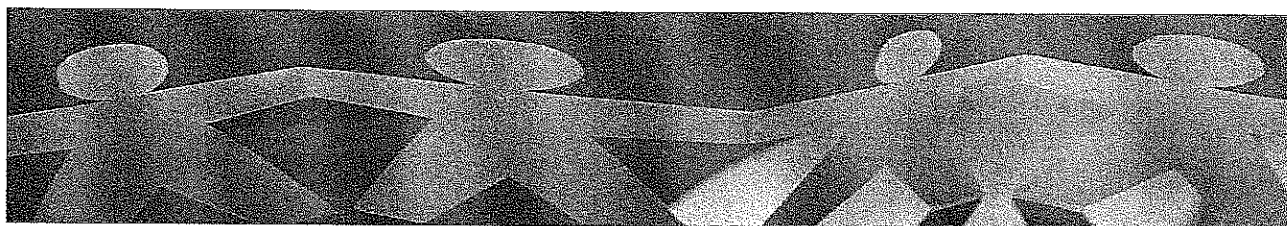
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## Performance Development and Assessment

<b>Staff Member's Name:</b>	
<b>Position:</b>	Case Manager (Housing)
<b>Manager's Name:</b>	

<b>Review Period:</b>	
-----------------------	--

<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
--------------------------------------	--

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

<b>Date Performance Review Completed:</b>	
<b>Performance Review Agreed:</b> (Refer to page 23 of the guidelines)	Yes / No

\_\_\_\_\_  
(Manager)

\_\_\_\_\_  
(Staff Member)

<b>Overall rating:</b>	
------------------------	--

## Key Deliverables – refer page 8 of guidelines

### Ratings:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

### 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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**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 / or tenancy 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 Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**Supporting Client Housing Outcomes**

Takes an 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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Key Deliverables</b>	
<b>Timeliness</b> Supports the site to achieve service excellence standards: <ul style="list-style-type: none"> <li>• Assessments - 95% of all housing assessments are completed within 5 working days of receipt of the last piece of information</li> <li>• Tenancy Reviews - 95% of clients are contacted every 28 days.</li> <li>• provides a timely response to work requests and can adapt to shifting demands on a daily basis.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Accuracy</b> Supports the region/MSD to achieve service excellence standards: <ul style="list-style-type: none"> <li>• 90% of all client entitlements are correctly identified and processed.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Service Quality</b> Makes individual contribution to service quality by: <ul style="list-style-type: none"> <li>• individual contribution to service quality monitor.</li> <li>• maintains excellent service in line with the national service standards.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>ADDITIONAL KEY DELIVERABLES</b> <i>use this section to record any additional result areas or projects you have been responsible for during the year</i>	
<b>What is to be achieved:</b>	
<ul style="list-style-type: none"> <li>•</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
--	---	--

**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 to 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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

**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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

## 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:**

**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 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:**



**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:**

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT

## 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

<b>Key Successes and Highlights</b>
<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

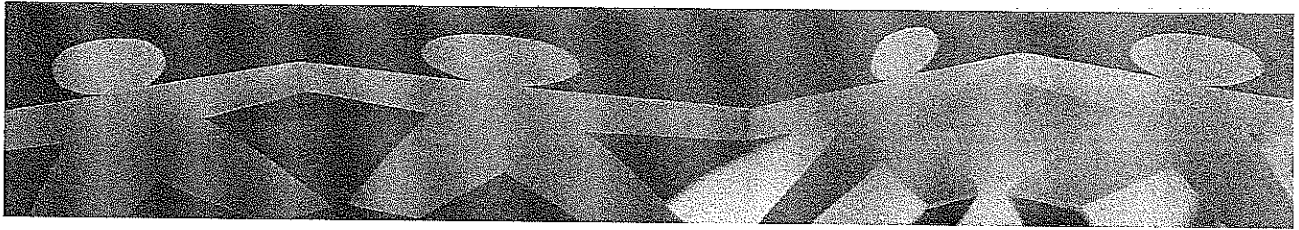
## Individual Development Plan – refer to page 13 of the guidelines

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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

Attach coaching notes



## 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 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:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
--	--	--	--

Key Deliverables	
<p><b>Client Service</b></p> <ul style="list-style-type: none"> <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</li> <li>adheres to relevant legislation and policy</li> <li>provides initial screening to determine clients' eligibility for social housing and general housing-related options and advice.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Client Management</b></p> <ul style="list-style-type: none"> <li>manages client phone calls confidently and professionally ensuring outcomes meet client needs</li> <li>calls follow a logical progression, remain on track and focused</li> <li>uses appropriate tone and language to support client interactions</li> <li>actively listens to clients and checks for understanding, questioning and paraphrasing appropriately</li> <li>ensures processing actions support client outcomes</li> <li>manage outbound calls confidently and professionally to meet the intent of the campaign</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

**Key Deliverables**

**Use of Resources**

- utilises resources to ensure information and decisions are correct
- uses phone system effectively
- uses applications to record information and fully inform clients
- uses 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 roster requirements and understands the impact of not complying to the roster
- accounts for time off the phones during the day
- meets 100% adherence target
- meets 92% compliance target

**Self Assessment:**

**Manager's Comment:**

**Rating:**

<b>Key Deliverables</b>	
<b>Accuracy</b>	
<ul style="list-style-type: none"> <li>• meets contact centre call assessment target of 95%</li> <li>• Meets contact centre action assessments target of 95%</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Client Satisfaction</b>	
<ul style="list-style-type: none"> <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>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Optional Key Deliverable</b>	
<b>Online Services (as applicable)</b>	
<ul style="list-style-type: none"> <li>• ability to efficiently diagnose a client's online services issue by using effective communication skills and referring to the trouble shooting knowledge base</li> <li>• ensures clients are provided with an effective solution to the online services issue they have experienced</li> <li>• escalates Online Services issues, that require an IT intervention, through the agreed escalation processes as outlined in the Online Services knowledge base.</li> <li>• manage contacts accurately and in a timely and effective manner.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**Optional Key Deliverable****Quality Assurance/ Buddying/ Expert (as applicable)**

- quality assurance/ buddying/ expert (as applicable)
- completes call evaluations and checks work according to site or national quality assurance plans,
- 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 needs when required
- prepares analysis of quality trends and issues when required
- provides testing/checking of work through sampling and at the direction of management
- identifies and recommends continuous improvements to processes and procedures (via the alerts system)
- 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 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 performance 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:**

- 
- 

**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.

**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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------

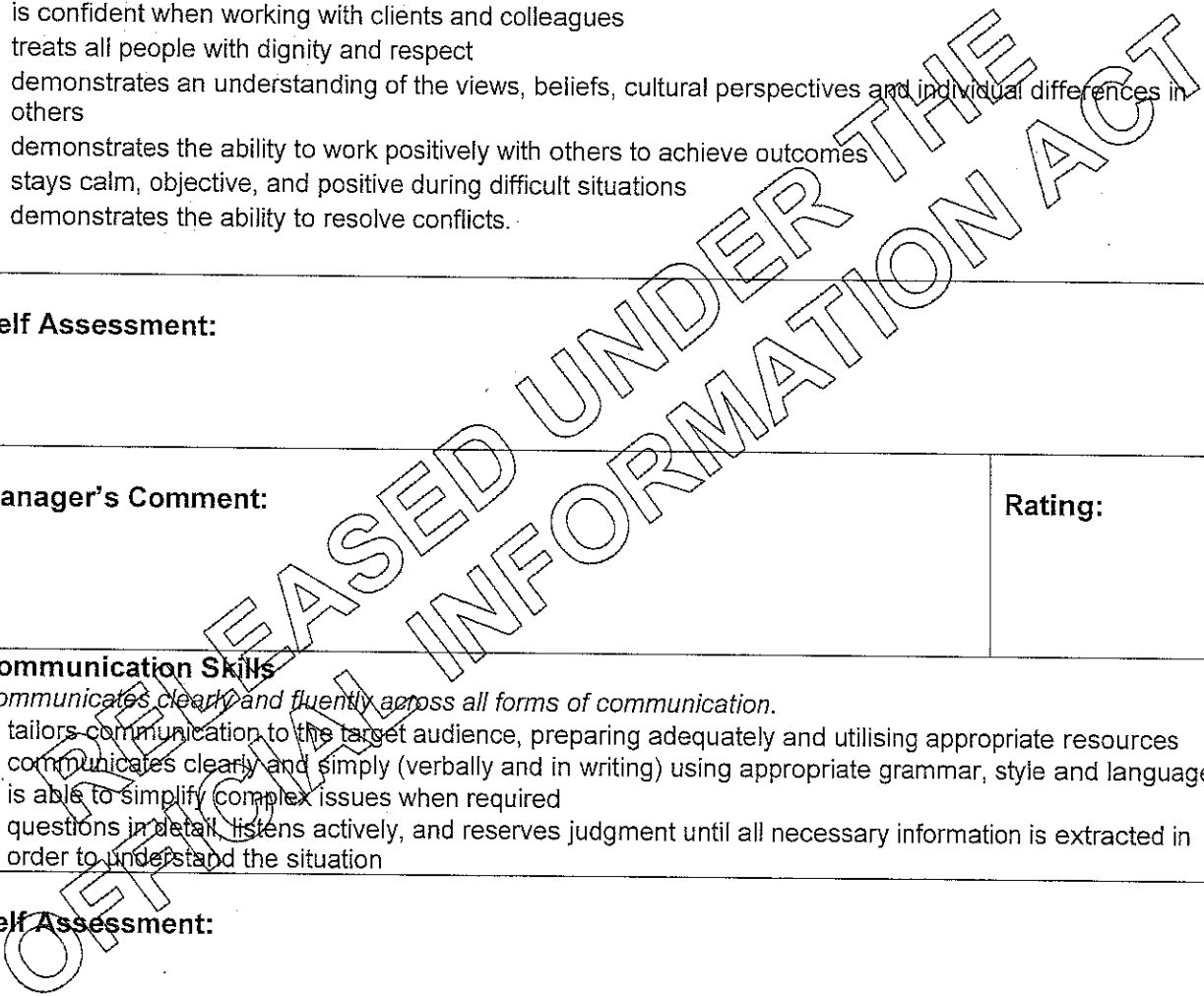
**Communication Skills**

*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:**

<b>Manager's Comment:</b>	<b>Rating:</b>
---------------------------	----------------



**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:**

**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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**Success Factors**

**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 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:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**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 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:**

**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**

*(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 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.

<p><b>Needs Improvement</b></p> <p>Does not achieve all key deliverables, and success factors are predominately 'Needs Development'. Action must be, or is being taken to improve performance.</p>	<p><b>Expectations Achieved</b></p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p><b>Exceeding Expectations</b></p> <p>Exceeds most key deliverables and success factors are a mix of 'Competent' and 'Strength'. Contribution is viewed as very strong with some notable achievements.</p>	<p><b>Outstanding</b></p> <p>Exceeds all key deliverables and all success factors are 'Strength'. Is considered a role model in both what is achieved and success factors demonstrated.</p>
--	---	--	---

Key Successes and Highlights
<p><b>Self:</b></p>
<p><b>Manager's:</b></p>
<p><b>Overall Rating Achieved:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT

## 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.

<b>Areas for development</b> <ul style="list-style-type: none"> <li>• On the job development/ assistance required</li> <li>• Knowledge and Skills required to perform role</li> <li>• Tools required to perform role</li> <li>• Development/Assistance towards Future Goals</li> </ul>	<b>Link to:</b> <ul style="list-style-type: none"> <li>• Key Deliverable</li> <li>• Success Factor</li> <li>• Career Goal</li> </ul>	<b>Agreed action responsibilities</b>	<b>Who will do it? By When?</b>	<b>Date Completed</b>

Attach coaching notes