

1. 7:30 A.M. Agenda

Documents: [PER_20151021_AG.PDF](#)

2. 7:30 A.M. Complete Packet

Documents: [PER_20151021_PK.PDF](#)



Administrative Offices
5520 Lacy Road
Fitchburg, WI 53711-5318
Phone: (608) 270-4200 Fax: (608) 270-4212
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**AGENDA
PERSONNEL COMMITTEE
Wednesday, October 21, 2015
7:30 A.M.
CITY HALL**

NOTICE IS HEREBY GIVEN that the Fitchburg Personnel Committee will meet at 7:30 A.M. on Wednesday, October 21, 2015 in the Meeting Room at City Hall, 5520 Lacy Road to consider and act on the following:

1. Call to order
2. Approval of Minutes of the June 24, 2015 meeting.
3. Discussion, Consideration, and possible approval of employee sabbatical use
4. Discussion, Consideration, and possible Approval of beginning sick leave balance for a new employee.
5. Discussion, Consideration, and possible approval of update to Paid On-Call pay plan administration
6. Discussion, Consideration, and possible approval of R-112-15 Approving the Employee Development Program and Procedures
7. Announcements
 - a. Schedule time for next meeting
8. Adjournment



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City of Fitchburg
Personnel Committee
Minutes
Wednesday, June 24, 2015

Members Present: Jason Gonzalez, Dorothy Krause
Absent With Excuse: Carol Poole
Also Present: Lisa Sigurslid, Human Resources Manager; Misty Dodge, Finance Director; Dell Zwieg, Interim Assessor

1. Call to Order – The Personnel Committee Meeting was called to order by Gonzalez at 8:00 a.m.
2. Approval of Minutes of the April 10, 2015 Meeting
Motion by Krause to approve the April 10, 2015 personnel committee minutes. Motion carried.
3. Discussion, Consideration, and possible Approval of Assessing Department re-organization and position reclassifications

Sigurslid provided the committee with information related to the recommendation by Administrator Roach to realign the duties of the Assessing department into the Finance department. This recommendation is being made following the retirement of the previous Assessor. This will reduce the number of direct reports for the City Administrator and merge two departments that work closely together. There will be no changes to the day to day operation and functions of either department. The change would result in a lower pay grade for the Assessor position. This is a concern as these are traditionally hard to fill positions with a very limited applicant pool. Dodge and Zwieg were present to answer questions from the committee.

- a. Approval of Assessing Department re-organization.
Motion by Krause to approve the re-organization of the Assessing department. Motion failed.
 - b. Approval of City Assessor reclassification.
Motion by Krause to approve the Assessor reclassification. Motion failed.
4. Update on Performance Evaluation process
Sigurslid provided the committee with an update on the performance evaluation project. The will be on the agenda for consideration at the next committee meeting.
5. Announcements
 - a. Schedule time for next meeting - TBD
6. Adjournment
Krause moved adjournment at 8:19 a.m.



Date: October 15, 2015

To: Personnel Committee

From: Lisa Sigurslid

Re: Sick leave balance for new employee

Earlier this year the retirement of City Assessor Michael Procknow created a vacancy in the Assessing department. This position was filled by former Commercial Appraiser Dell Zwieg. Following Dell's acceptance of the City Assessor position we began the recruitment process for the Commercial Appraiser position.

Positions within the Assessing department are often difficult to fill given the high technical requirements and relatively small market (Madison and Sun Prairie are the only other municipalities with staff appraisers in Dane County). The last time we filled the Commercial Assessor position was in 2011 when Dan Crowley retired. At that time we received a total of four applications, this year we received seven.

Interviews were completed in September and an offer was extended to the top candidate, Daniel Storm. After discussions regarding salary and benefits, Daniel accepted the position with an offer as outlined on the following page. Part of the offer consists of a beginning sick leave balance. Per section 3.24 of the Employee Policies and Procedures manual, a sick leave balance may be offered pending Personnel Committee approval.

3.24 Sick Leave

"... The City Administrator may offer a beginning sick leave balance for new exempt employees, based upon prior experience, with approval of the Personnel Committee, but that amount shall not exceed the average amount of current exempt employees based on comparable years of experience..."

I am requesting a sick leave beginning balance for Daniel Storm in the amount of 100 hours. Dan has over 20 years appraisal experience with the Wisconsin Department of Revenue. He is certified in multiple appraisal areas and would make an excellent addition to our team.



Daniel Storm
2642 Placid St.
Fitchburg, WI 53711

Dear Dan:

Congratulations! This letter is to confirm our conversation in which you accepted a conditional offer of employment for the position of Senior/Commercial Property Appraiser with the City of Fitchburg's Assessing Department. This offer is contingent upon successfully passing a pre-employment drug screening, which you have been advised to schedule.

Your starting salary will be \$73,257 annually (Grade K, Step 6), payable biweekly. You will be eligible for additional increases in accordance with the non-represented compensation plan. Upon approval by the City's Personnel Committee, you will be credited with a sick leave balance of 100 hours.

As discussed, your start date will be Monday, November 16, 2015. Please bring two forms of identification with you to the orientation as you will be required to verify your eligibility to work in the United States at that time (i.e., valid driver's license and social security card, or U.S. Passport).

You have had the opportunity to review the job description, should you require accommodations to assist you in the performance of these duties please let us know. Also, at any time, should your need for accommodations change, please let me know so that we may evaluate your request for accommodations.

Please be advised that this is a non-represented, exempt position, and nothing in this letter should be interpreted as a contract. We are very pleased that you have accepted this position and look forward to a mutually beneficial relationship. Please sign one copy of this letter indicating that you have accepted this position and return it to me. The other copy may be retained for your file.

Sincerely,

Lisa A Sigurslid, PHR
Human Resources Manager

I accept the position of Senior/Commercial Property Appraiser.

Daniel Storm

Date

cc: Dell Zwieg, Assessor
file



To: Mayor Shawn Pfaff
Personnel Committee

CC: Tony Roach, City Administrator
Misty Dodge, Finance Director

From: Chad Grossen, Acting Fire Chief
Lisa Sigurslid, Human Resources Manager

Re: Paid on-call (part-time) Firefighter salary proposal

Date: December 4, 2014

Over the last several years there have been numerous discussions surrounding the pay structure for Paid On-Call Firefighters. It is true that the structure has not been changed in several years and is in need of an update, something confirmed by Ethical Leaders in Action following their recent organizational analysis. The difficulty lies in determining the best way to provide our firefighters with compensation that is equitable in the marketplace, rewards members for their contributions to the department, and provides a clear path for career progression.

In August, a survey was distributed to fire departments across Wisconsin and Illinois that focused on part-time firefighter and officer pay. We received nearly 50 responses to the survey, which is an excellent sampling. While reviewing these responses it became apparent that the pay structures presented by each of these departments were as different as the departments themselves. Because of the wide array of departments we focused our attention on the responses provided by those that were most similar to Fitchburg in population served, number of career and part-time members, and number of calls per year.

We had several goals in mind while trying to come up with a pay structure, they were:

1. The plan must be easy to understand and administer, it must also be easily communicated with staff. Staff understands how they get a raise.
2. The plan rewards those that take on additional responsibilities/duties.
3. The plan encourages advancement within the department.
4. The plan is equitable in the marketplace.
5. The plan removes the use of stipends, with the exception of Interns.

The following page details our recommendations.

In addition to the 2015 Salary Structure, we further recommend that:

1. A bonus program is implemented in 2016 to recognize members for exceeding the minimum requirements for all-call response. Proposal for 2016 budget.
2. A review of the pay plan is completed during the summer of 2015 to determine if it is meeting the defined goals and if additional adjustments are needed. Proposal for 2016 budget if needed.

The following salary structure is for all employees employed as part-time firefighters, including interns and support staff. We recommend the implementation of the schedule effective 01/01/2015.

Paid On-call (Part-time) Firefighters and Interns

Hire Rate: \$ 8.50/hr.

Upon completion of minimum skills and:

Certification as Firefighter I: + \$ 1.00/hr.

Certification as Emergency Medical Responder (EMR) or above: + \$ 0.50/hr.

Upon completion of minimum skills training (including 50 hours ride time and Firefighter I certification) and one year employment, or at any time thereafter:

Certification as Driver/Operator – Pumper + \$ 0.75/hr.*

Certification as Driver/Operator – Aerial: + \$ 0.75/hr.*

Certification as Firefighter II: + \$ 0.25/hr.

Completion of Fire Instructor I with certificate: + \$ 0.25/hr.

Certification as Fire Officer I or

Designation by the Fire Chief as an Acting Officer:

+ \$ 0.25/hr.**

Certification as Fire Officer II + \$ 0.25/hr.

2015 Maximum hourly rate: \$12.50/hr.

* Must also be eligible to drive under department policy to receive increase amount.

**As part of the recommended structure, acting officer stipends would be eliminated effective 01/01/2015.

In the event a Firefighter is no longer eligible to serve as an Acting Officer, Driver/Operator or fails to maintain their attained certifications they will no longer be eligible for the designated differential associated with that skill.

Fire Officers

***As part of the recommended salary structure, all officer stipends will be eliminated. Officers will be paid based upon their placement on the above scale plus the officer differential listed below. Effective 01/01/2015, Fire Officer I will be required for promotion into any of the sworn positions listed below.**

Lieutenant - pay from above, plus: + \$ 1.00/hr. (Maximum - \$13.50/hr.)

Captain – pay from above, plus: + \$ 1.50/hr. (Maximum - \$14.00/hr.)

Division Chief – pay from above, plus: + \$ 2.00/hr. (Maximum - \$14.50/hr.)

Deputy Chief – pay from above, plus: + \$ 2.50/hr. (Maximum - \$15.00/hr.)

Support Staff

Increase hourly rate from \$8.50 to \$10.00 per hour.

Fiscal Impact – This proposal was evaluated based upon the current staffing levels, 2014 YTD salary expenditures, and 2015 budgeted hours for applicable positions. With the elimination of command pay and officer stipends, the cost of this structure is projected to be less than the proposal initially brought forth during the 2015 budgeting process to increase all salaries by \$1.50 per hour.

City of Fitchburg

Committee or Commission Referral

Direct Referral Initiated by:
Direct Referral Approved by:

Date Referred: **October 13, 2015** Ordinance Number:
Date to Report Back: **October 27, 2015** Resolution Number: **R-112-15**

Sponsored by: Mayor Arnold Drafted by: Sigurslid

TITLE: **APPROVING THE EMPLOYEE DEVELOPMENT POLICIES AND PROCEDURES**

Background:

See attached memo.

Order	Referred To	Staff Contact	Place on Agenda For	Action Taken On Referral
1	Personnel Committee	Sigurslid	TBD	
2				
3				
4				

Amendments:

Mayor Arnold
Introduced by

Sigurslid
Prepared by

Personnel Committee
Referred to

October 6, 2015
Date

**RESOLUTION R-112-15
APPROVING THE EMPLOYEE DEVELOPMENT
PROGRAM AND PROCEDURES**

WHEREAS, the City Council adopted a new compensation and classification system on September 23, 2014; and

WHEREAS, the new compensation and classification system contained a merit pay element; and

WHEREAS, the City Council and Personnel Committee directed staff to recommend a revised evaluation system that incorporates merit pay.

NOW, THEREFORE, BE IT HEREBY RESOLVED, that the Common Council of the City of Fitchburg, Dane County, Wisconsin, hereby approves the revised Employee Development Policies and Procedures as recommended by the Personnel Committee, dated October 27, 2015.

Adopted this 27th day of October, 2015.

Approved By: _____
Stephen Arnold, Mayor

Attested By: _____
Patti Anderson, City Clerk



Date: September 16, 2015

To: Pat Marsh, City Administrator

From: Lisa Sigurslid, Human Resources Manager

Re: Employee Development Program and Procedures Recommendation

Background

In 2014, the City underwent an extensive compensation and classification review of all of regular full and part-time positions (excluding represented public safety personnel). The main purpose of this project was to align all positions on a common pay structure with a focus on equity both internally and within the marketplace. During the course of this project the Personnel Committee was presented with three different compensation models – full step system, open range system, and combination system. The Personnel Committee selected the combination system that provides scheduled steps up to the control point with an open “merit” range up to the maximum. The pay structure was approved by the Personnel Committee on September 22, 2014 and by the Common Council on September 23, 2014.

Following the approval of the pay structure, a work group was formed by former Administrator Tony Roach to research a new evaluation system for the implementation of the merit component of the pay plan. The group met weekly with the goal of having an evaluation system ready by January 1, 2015. It quickly became evident that a January 1 target date was not realistic. The Personnel Committee met on December 11, 2014, approving the recommended pay plan implementation and administration procedures. These procedures provide a procedure for placing all employees on the new scale and guidance as to how new employees would be placed. An update on the performance evaluation project was also shared at this meeting as work continued.

The work group met regularly through the winter and spring of 2015. Numerous options were discussed before finalizing an evaluation system similar to that of Manteca, California. Enclosed is the group’s recommendation for an Employee Development Program, including procedures, to be utilized by all staff, including those not on the non-represented salary structure. What follows is the recommendation for implementing the Employee Development Program throughout the remainder of 2015 and into 2016, with full implementation by May 1, 2016.

Employee Development Program Implementation

The timeline detailed below provides a roadmap for full implementation of the employee development program by May 1, 2016. These dates are contingent upon the approval of the program by the Personnel Committee and the Common Council. Delays in approval by these bodies may result in a lengthier implementation.

Now through December, 2015	Human Resources to resume implementation of the NeoGov Perform module (automated evaluation software)
October 13, 2015	Referral by the City Council to the Personnel Committee
October 27, 2015	Referral due back to the City Council, approval of the Employee Development Program
November 2, 2015	Human Resources submits 2015 pay changes for processing Eligible employees will receive either a one-step increase or a 1.5% merit increase retroactive to their anniversary date. To be eligible for an increase, employees cannot be on a performance improvement plan. Employees that received a pay exception from the Personnel Committee in December 2014 will not be eligible for any further merit increases in 2015.
November 2015- December 2015	Manager and Supervisor Training Human Resources will meet with Managers and Supervisors to explain the new evaluation process. Training will include: conducting the Evaluation Planning Meeting, Core Values, General Competencies, Leadership Competencies. NeoGov Perform training will be held in early 2016 at the latest.
November 2015 - April 2016	Evaluation Planning Meetings Managers will hold their first Evaluation Planning Meetings with their direct reports. This meeting will include a review of the Core Values, selection of the General Competencies, and goal setting. These meetings will be conducted as follows:

<u>Meeting Month</u>	<u>Employee Anniversary Date</u>
November	November & May
December	December & June
January	January & July
February	February & August
March	March & September
April	April & October

Example: During December 2014, Managers will meet with their direct reports that have anniversary dates in December and June. These employees will receive their first evaluation using the new model in June and December of 2016. It is important to remember that as some will have just six months until their next evaluation, goals and objectives should be determined accordingly.

OVERVIEW

The Reference Guide has been designed as a resource for all employees. Its primary purposes are to bring more detailed definition to the behaviors that are important for the City of Fitchburg to achieve our strategic goals and to create a common, objective language for talking about job performance and behavioral skills.

Each Competency in the guide has a Definition and a set of behavioral skills called Behavioral Indicators. The Behavioral Indicators are observable behaviors that individuals employ when they are demonstrating a particular Competency. For example, when an employee is demonstrating “Initiative”, one of the things others will observe that individual doing is seeking information from many different sources before deciding on his/her own approach. This is the third Behavioral Indicator in the guide under the Competency “Initiative”. Note that observing a behavior means you can either see or hear an individual exhibiting that behavior.

During the planning phase of the employee development process, supervisors and their employees will use the guide to determine how the employee can most effectively achieve their goals or planned outcomes. There are five Core Values; they are Accountability, Service Excellence, Dedication, Initiative, and Pride. These values are key to the success of all City staff and will be included on all evaluations. There are sixteen general competencies and five management and leadership competencies. Based on the job duties, five to seven competencies from the general list will be utilized that will help the employee achieve his/her planned outcomes or goals. All competencies are important, but there are certain competencies that are more relevant than others to the particular job or focus for the year. Note: All employees who supervise others must be evaluated on all of the management and leadership competencies.

Once the Competencies have been assigned, the supervisor and employee will discuss Behavioral Indicators in each Competency that will be performance expectations for that employee.

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EVALUATION PROCESS

The Employee Development process is a yearlong process that culminates in a formal, written evaluation approximately one month prior to the employee's anniversary date (in position). There are three distinct steps to the evaluation process, each of them occurring at various times throughout the year.

Preliminary Meeting – At the preliminary meeting, the employee will meet with their immediate supervisor to establish the criteria for the upcoming review period. The position description and job requirements will be reviewed, competencies will be selected, and goals will be set. Together the evaluation planning worksheet will be completed and signed.

Mid-Year Check-in – Approximately six months after the preliminary meeting, the employee and supervisor will meet formally to review the competencies selected and the progress made on the agreed upon goals. Additional informal meeting are expected to occur at various times throughout the evaluation period.

Performance Evaluation – Approximately one month prior to the employee's anniversary date, the formal evaluation will be completed by the supervisor and discussed with the employee. Following the completion of the performance evaluation, the meeting will transition into the Preliminary meeting for the next evaluation cycle.

COMPETENCY SCORING AND WEIGHT

Each core value/competency on the evaluation will be scored on a scale of one to five. The overall score will be determined by adding all individual scores together and dividing by the number of evaluated competencies.

There will be two or three scored sections on the evaluations, depending on the position. Non-supervisory employees will be rated on Core Values and General Competencies. Supervisory employees will have an additional section, Management and Leadership Competencies.

Non-Supervisory Employees

Core Values – 50%

General Competencies – 50%

Supervisory/Management Employees

Core Values – 50%

General Competencies – 25%

Management & Leadership – 25%

All items within each category will be weighted equally.

RATING SCALE

The following rating scale will be utilized for each value/competency.

1 – Unsatisfactory	Employee performance is regularly below expectations. A separate action plan or Performance Improvement Plan is necessary for this rating.
2 – Needs Improvement	Employee performance occasionally does not meet expectations. This rating may be addressed within the evaluation by a comment. A separate action plan or Performance Improvement Plan may also be utilized.
3 – On Target	Employee performance consistently meets expectations.
4 – Exceeds Expectations	Employee performance frequently exceeds expectations.
5 – Outstanding	Employee demonstrates exceptional performance and makes superior contributions. This rating should be used sparingly to indicate extraordinary performance with achievements far in excess of expectations.

CUMULATIVE SCORE

An employee's cumulative score will be determined by adding together the scores for each competency and dividing by the total number of competencies. Employees will receive a salary adjustment based upon their cumulative score and the tables below.

For Employees within Steps (below market)

Cumulative Score	
2.99 or below	No Increase
3.00 – 3.99	One Step Increase (2.5%)
4.00 and above	Two Step Increase (5.0%)

For Employees within the Pay for Performance Range (at or above market)

Cumulative Score	
2.99 or below	No Increase
3.00 – 3.49	Council approved increase
3.50 – 3.99	Council approved Increase plus .50%
4.00 – 4.49	Council approved increase plus 1.00%
4.50 and above	Increase Recommended by Department Head and approved by Administrator

Effective January 1, 2016, step and pay for performance increases will be effective the first day of the pay period following the employee's date in position.

CORE VALUES

These core values are the guiding principles for all employees of the City of Fitchburg. They are the foundation on which we perform our individual job functions and provide direction on how people are to conduct themselves as representatives of the City of Fitchburg. They represent our highest priorities, deeply held beliefs, and core, fundamental driving forces. These core values define how we want our organization resonating with and appealing to staff and our customers.

Accountability: We recognize that our behavior must reflect honesty, sincerity, and integrity through ethical and legal standards. We are dependable and accountable to our taxpayers, citizens, and each other.

Service Excellence: We provide excellent customer service by being helpful, positive, and caring. We maintain a respectful attitude with all of our customers.

Dedication: We are dedicated to the community and each other. We work together to bring out the best from our combined talents, experiences, knowledge and cultures, thereby creating a strong, positive, cooperative, and fun environment.

Initiative: We strive to embrace change, encourage and support new ideas and methods, and are committed to continuous improvement. We search for ways to increase efficiencies, responsibly manage our limited resources, and develop a sustainable community.

Pride: We take pride in our work, continuously improving our skills and abilities to deliver quality services in a timely manner. We recognize and celebrate the successes of our fellow staff and the community.

GENERAL COMPETENCIES

ATTENTION TO DETAIL

DEFINITION:

Thoroughness in accomplishing a task through concern for all the areas involved, no matter how small. Monitors and checks work or information and plans and organizes time and resources efficiently.

BEHAVIORAL INDICATORS:

- Provides accurate, consistent information on all paperwork.
- Provides information on a timely basis and in a usable form to others who need to act on it.
- Maintains a checklist, schedule, calendar, etc., to ensure that small details and/or deadlines are not overlooked.
- Double-checks the accuracy of information and work product.
- Carefully monitors the details and quality of own and others' work.
- Expresses concern that things be done right, thoroughly, or precisely.
- Follows policies, procedures, and safety and security measures in using various equipment.
- Completes all reports and documents according to procedures and standards.
- Maintains properly equipped work area.
- Takes necessary actions to produce work that requires little or no checking.

COLLABORATION

DEFINITION:

Develops cooperation and teamwork while participating within your workgroup or within a group of people, working toward solutions which generally benefit all involved parties.

BEHAVIORAL INDICATORS:

- Solicits the input of others who are affected by plans or actions.
- Gives credit and recognition to others who have contributed.
- Finds areas of agreement when working with conflicting individuals or groups.
- Identifies and pushes for solutions in which all parties can benefit.
- Demonstrates concern for treating people fairly and equitably.
- Keeps people informed and up-to-date.
- Builds consensus.
- Listens to all points of view.
- Readily gets cooperation of others for whom one has no direct supervisory responsibility.

COMMUNICATION

DEFINITION:

Creates an atmosphere in which timely and high quality information flows smoothly both up the organization and down, inside and outside the organization; encourages open expression of ideas and opinions.

BEHAVIORAL INDICATORS:

- Asks open-ended questions that encourage others to give their points of view.
- Keeps people accurately informed and up to date.
- Appropriately expresses one's own opinion.
- Refrains from immediate judgment and criticism of others' ideas, delivering criticism in a way that demonstrates sensitivity to the feelings of others.
- Waits for the other person to finish their intended message before responding.
- Encourages staff to keep one another informed and share information.
- Uses vocabulary which is appropriate to the audience.
- Keeps responsible people informed of both positive and potentially negative information.
- Asks questions as necessary to clarify a message being delivered, demonstrating close concentration on the message.
- Encourages response and dissent to ideas and issues.

CUSTOMER FOCUS

DEFINITION:

Demonstrates concern for meeting internal and external customers' needs in a manner that provides satisfaction for the customer. ["Customers" can be residents, visitors, volunteers, co-workers, peers, supervisors or managers, vendors, suppliers, external partners or other stakeholders.]

BEHAVIORAL INDICATORS:

- Asks questions to identify customer's needs or expectations.
- Understands by stating what he/she believes are the customer's needs or expectations and asks the speaker to verify or clarify.
- Considers the impact on the external customer when taking action, setting policies or carrying out one's own job tasks.
- Looks for external trends that are likely to shape the wants and needs of customers in the near future.
- Involves stakeholders in the decision-making or problem-solving process as early as possible.
- Looks for creative approaches to providing or improving services that may increase efficiency and decrease cost.
- Works to remove barriers that get in the way of giving customers top notch service.
- Asks questions of customers to assess satisfaction with service being provided.
- Refers customer to appropriate department or employee to solve specific problems.
- When referring customers to different departments, follows up to make sure that the customer has been taken care of.
- Seeks ways to continuously improve external and internal customer satisfaction with product or service quality and on-time delivery.
- Strives to provide immediate assistance to customer's needs. If delays are necessary, frequently provides status reports to customers and follows up to assure satisfactory completion.

RESULTS

DEFINITION:

Demonstrates concern for achieving or surpassing results against an internal or external standard of excellence, shows a passion for improving the delivery of services with a commitment to continuous improvement.

BEHAVIORAL INDICATORS:

- Holds self and other team members accountable for achieving results.
- Recognizes and capitalizes on opportunities.
- Sets and maintains high performance standards for self and others. Tries new things to reach challenging goals while also taking action to minimize the risks involved.
- Persists until personal and team goals are achieved and commitments met.
- Finds more efficient and less expensive ways to do things.
- Works to meet individual and departmental goals with positive regard, acknowledgment of, and cooperation with the achievement of others' goals.
- Motivates others to translate ideas into actions and results.

INITIATIVE

DEFINITION:

Does more than is required or expected in the job; does things that no one has requested that will improve or enhance products and services, avoid problems, or develop opportunities. Plans ahead for potential problems or opportunities and takes appropriate action.

BEHAVIORAL INDICATORS:

- Does things before being asked or before the situation necessitates action (i.e., forced to by events).
- Recognizes and acts upon opportunities.
- Seeks information from many different resources before deciding on own approach.
- Does more than is minimally required in the assignment, task or job description.
- Digs beneath the obvious to get at the facts, even when not asked to do so.
- Creates opportunities or minimizes potential problems by anticipating and preparing for these in advance.
- Tries out new ideas after consideration of all factors involved and potential consequences and outcomes.
- Seeks out and/or accepts additional responsibilities in the context of the job.

JOB-FOCUSED LEARNING

DEFINITION:

Demonstrates eagerness to acquire the necessary technical knowledge, skills, and ability to accomplish a result or to serve a customer's needs effectively. Has desire and drive to acquire knowledge and skills necessary to perform the job more effectively.

BEHAVIORAL INDICATORS:

- Seeks out opportunities to gain additional operational exposure and experience.
- Identifies and pursues areas for development and training that will enhance job performance.
- Maintains fluency in appropriate business applications, software, or tools.
- Keeps up to date on current research and technology in their field.
- Reviews, selects, and disseminates information regarding key technologies, best practices, and tools to others in the group.
- Demonstrates resourcefulness in acquiring necessary knowledge inside or outside area of expertise when designing solutions or improving performance.
- Continually looks for ways to expand job capabilities.
- Selects appropriate development activities from a range of competing alternatives and pursues them.

ORGANIZATIONAL UNDERSTANDING

DEFINITION:

Understands the agendas and perspectives of others, recognizing and effectively balancing the interests and needs of one's own group with those of the broader organization.

BEHAVIORAL INDICATORS:

- Understands the organizational implications of events.
- Knows how to use the organization's formal and informal system to get things done.
- Demonstrates awareness of goals of other units and of the organization and makes requests or decisions in support of this awareness.
- Uses the most appropriate channels and cost-effective means in communications within and between departments.
- Identifies key decision makers on issues of concern.
- Recognizes which issues are worth pursuing and when it is time to compromise.
- Keeps objectives that are related to organizational priorities at the top of one's own priorities and the priorities of one's work group.
- Works to build a sense of common purpose across all work groups, avoiding a "we versus them" attitude.
- Identifies underlying problems affecting organizational or individual performance such as market conditions, taxpayer concerns, or other external forces.

PLANNING AND ORGANIZING

DEFINITION:

Establishes a systematic course of action for self or others to ensure accomplishment of a specific objective. Sets priorities, goals, and timetables to achieve maximum productivity.

BEHAVIORAL INDICATORS:

- Develops or uses systems to organize and keep track of information (e.g., "to-do" lists, appointment calendars, follow-up file systems).
- Sets priorities with an appropriate sense of what is most important.
- Keeps track of activities completed and yet-to-do to accomplish stated objectives.
- Keeps clear, detailed records of activities related to the accomplishment of stated objectives.
- Plans with an appropriate and realistic sense of the time demand involved.
- Knows status of one's own work at all times.
- Creates action plans for achieving performance expectations.

PROBLEM SOLVING/ANALYTICAL THINKING

DEFINITION:

Builds a logical approach to address problems or opportunities or manage the situation at hand by drawing on own knowledge and experience base and calling on other references and resources as necessary.

BEHAVIORAL INDICATORS:

- Undertakes a complex task by breaking it down into manageable parts in a systematic, detailed way.
- Anticipates the consequences of situations.
- Thinks of several possible explanations or alternatives for a situation.
- Identifies the information needed to solve a problem effectively.
- Gets input from internal/external contacts whom are closest to the problem.
- Presents problem analysis and recommended solution to others rather than just identifying or describing the problem itself.
- Acknowledges when one doesn't know something and takes steps to find out.
- Anticipates potential obstacles and develops contingency plans to overcome them.
- Considers the organization's priorities when making decisions or analyzing the costs and benefits of various alternative solutions.

TECHNICAL EXPERTISE

DEFINITION:

Applies and improves extensive or in-depth specialized knowledge, skills, and judgment to accomplish a result or to serve one's "customers" effectively. ["Customers" can be residents, visitors, volunteers, co-workers, peers, supervisors or managers, external partners, or other stakeholders.]

BEHAVIORAL INDICATORS:

- Understands technical aspects of one's job.
- Makes self available to others to help solve technical or procedural problems or issues.
- Continuously builds knowledge, keeping up-to-date on the technical or procedural aspects of the job.
- Acts on own to improve and increase technical or procedural knowledge.
- Uses a wide range and depth of technical or specialized knowledge and skills.
- Keeps up-to-date on resources available to serve the needs of customers.
- Thinks of ways to apply new developments to improve organizational performance or customer service.
- Applies technical/procedural knowledge to correctly address a situation, taking into consideration the full range of available facts.
- Applies technical procedures correctly and in a timely manner.
- Recognizes trends in theory and practice of one's own technical area and effectively prepares for anticipated changes.

RELIABILITY

DEFINITION: Consistently performs required job duties and assignments. Employee is trusted and depended upon by co-workers, supervisor, and peers.

BEHAVIORAL INDICATORS:

- Demonstrates a high level of dependability in all aspects of the job.
- Completes all assigned tasks on time and with minimal supervision.
- Is punctual and present for work.
- Fulfills all commitments made to peers, co-workers, and supervisor.
- Informs appropriate individuals when assigned tasks will not be completed in agreed upon time frame.

INTEGRITY

DEFINITION:

Behaves and works in a way that exhibits honesty, openness, and respect in accordance with the City's core values.

BEHAVIORAL INDICATORS:

- Acts in an honest and trustworthy manner based on personal accountability and a moral conviction to do the right thing.
- Acts consistently with high standards of ethical judgment when participating in group decisions and problem-solving.
- Acts to protect and does not violate or compromise the confidentiality of information. Recognizes when situations or directives are directly or indirectly in conflict with professional ethics or with the organization's stated values.
- Promises only what can reasonably be delivered.
- Appropriately and consistently complies with policies and procedures.

FLEXIBILITY

DEFINITION:

Adapts to changes in circumstances even when unexpected. Able to adjust to meet varied needs.

BEHAVIORAL INDICATORS:

- Changes behavioral style or method of approach when necessary to achieve a goal; adjusts style as appropriate to meet the needs of the situation.
- Adjusts easily to changes at work in a calm and positive manner.
- Modifies a strongly held position in response to contrary evidence when appropriate.
- Recognizes the merits of different approaches and uses them in accomplishing work activities.
- Modifies own behavior to fit the situation at hand or to meet the expectations of others.

BASIC COMPUTING SKILLS

DEFINITION:

The ability to utilize computers and related technology efficiently as needed to perform job duties.

BEHAVIORAL INDICATORS:

- Demonstrates the ability to use technology to receive and share information as an active member of the organization and to accomplish position responsibilities successfully.
- Uses the City email application to share and receive information.
- Uses the City calendar application to plan and schedule work, meetings, and appointments.
- Navigates the website to obtain information.
- Demonstrates proficiency in the use of software applications required for the position.

INTERPERSONAL RELATIONSHIPS

DEFINITION:

The ability to build cooperative relationships with customers, co-workers, supervisors, and peers. Welcomes and respects differing views and opinions.

BEHAVIORAL INDICATORS:

- Thinks carefully about the likely effect on others of one's words, actions, appearance, and mode of behavior.
- Maintains stable performance and emotional control when faced with opposition, pressure, hostility from others, and/or stressful conditions.
- Demonstrates appropriate and professional behavior at all times.
- Uses a high degree of tact and diplomacy in working with others.
- Models and exercises sound judgment regarding personal conduct.
- Is aware of one's own style or preference and its impact on others.
- Earns the respect of others.
- Stays calm in the face of others' anger or lack of control or when faced with complaints.
- Demonstrates respect for all differences (e.g., race, gender, ethnic background, disabilities, sexual orientation, age, career levels, style, and opinions.)
- Refrains from behavior or language that is exclusionary or offensive in nature.
- Solicits opinions from many diverse perspectives.
- Considers different ideas when making business decisions.
- Adheres to the policy on sexual and other unlawful harassment.
- Participates in City training and learning opportunities to increase competence in Diversity.

INNOVATION

DEFINITION:

Generates novel and valuable ideas and uses these ideas to develop new or improved processes, methods, systems, products, or services.

BEHAVIORAL INDICATORS:

- Works to develop new approaches when problem-solving; seeking ideas or suggestions from others as appropriate.
- Identifies novel approaches for completing work assignments more effectively or efficiently and works within the "established" system to push for "a better way."
- Able to envision the impact of possible future changes.
- Suggests new ways to improve the quality of products or services.
- Identifies new ideas, solutions, or directions in dealing with daily situations.
- Displays a high level of curiosity and translates it into new approaches to solutions.
- Translates adversity into opportunities for improvement.

**Innovation is a required Management and Leadership Competency. Innovation may only be selected for non-supervisory employees under the General Competency heading.

MANAGEMENT AND LEADERSHIP COMPETENCIES

CHANGE LEADERSHIP

DEFINITION:

Initiates and/or manages the change process and energizes it on an ongoing basis, taking steps to remove barriers or accelerate its pace.

BEHAVIORAL INDICATORS:

- Communicates a compelling vision that generates excitement, enthusiasm, and commitment.
- Communicates the need for change and inspires commitment to the process.
- Obtains and provides resources to enable implementation of change initiatives.
- Clearly communicates the direction, required performance, and challenges of the unit to its members.
- Identifies and enlists the support of key individuals and groups to move the change forward.
- Demonstrates commitment to innovation and continuous improvement in organizational performance.
- Takes action to call attention to a crisis or heighten the awareness of a need for change.
- Enlists others effectively as champions of the change one is pursuing.
- Leads initiatives to change the structure, system, or talent mix of the organization to more effectively support the business strategy.
- Serves as a personal model of the change that she/he expects of others.
- Works to make others feel ownership in one's own solution.

COACHING

DEFINITION:

Works to improve and reinforce performance of others. Facilitates skill development in staff by providing clear, behaviorally-specific performance feedback, and making or eliciting specific suggestions for improvement in a manner that builds confidence and maintains self-esteem.

BEHAVIORAL INDICATORS:

- Reinforces effective behaviors or results immediately after the event.
- Compares and clearly states actual performance to expected or desired performance.
- Takes extra time to assist and provides specific, detailed follow-up.
- Demonstrates or specifically explains correct procedures or desired performance.
- Devotes time to providing task-related help to others, as needed.
- Asks questions that help other people recognize the need for performance improvement.
- Expresses confidence in an individual's ability to improve performance.
- Talks with others openly and directly about problems with their performance, providing necessary focus, guidance, and direction.
- Tailors feedback and interactive approach to the individual.
- Discusses problems immediately, before they are forgotten or out of control.
- Ensures clarity of and commitment to performance expectations.
- Collects and incorporates the feedback of others to create development plans.
- Gives specific feedback and examples in a manner that maintains self-esteem.

COLLABORATIVE LEADERSHIP

DEFINITION:

Promotes and generates cooperation among one's peers in leadership to achieve a collective outcome; fosters the development of a common vision and fully participates in creating a unified leadership team that gets results.

BEHAVIORAL INDICATORS:

- Takes into account the organization as a whole when making decisions. Separates one's own interests from organizational interests in order to make the best possible judgments for the City.
- Supports and acts in accordance with final leadership team decisions even when such decisions may not entirely reflect one's own position.
- Solicits the input of peers across the City even when those peers may only be minimally affected or involved.
- Finds areas of agreement when working with conflicting viewpoints and opinions.
- Identifies and pushes for solutions in which all parts of the City can benefit.
- Builds consensus among one's peers in leadership.
- Communicates key City priorities and how one's department contributes to achieving those priorities.
- Shares annual goals with peers in the City to increase alignment, cooperation, and opportunities to collaborate.
- Builds buy-in for strategic goals across the City.

DELEGATION

DEFINITION:

Utilizes direct reports effectively by allocating decision-making and other responsibilities to the appropriate person or persons.

BEHAVIORAL INDICATORS:

- Does not complete tasks that are/should be part of a direct report's responsibility.
- Assigned accountabilities are clear end results, not simply tasks to complete.
- Assignments are delegated to the appropriate person and that individual is capable of performing them successfully.
- Individualizes delegation to meet the needs and abilities of the individual.
- Encourages others to set own deadlines within time constraints of assignment and holds them accountable for meeting the deadline.
- Asks employee for his/her plan to address issue to be delegated, allowing person to create and "own" the solution.
- Manages risks by making contingency plans with employee.
- Clearly communicates expectations or boundaries.
- Provides the necessary guidance and resources when assigning work.

INNOVATION

DEFINITION:

Generates novel and valuable ideas and uses these ideas to develop new or improved processes, methods, systems, products, or services.

BEHAVIORAL INDICATORS:

- Works to develop new approaches when problem-solving; seeking ideas or suggestions from others as appropriate.
- Identifies novel approaches for completing work assignments more effectively or efficiently, and works within the "established" system to push for "a better way."
- Able to envision the impact of possible future changes.
- Suggests new ways to improve the quality of products or services.
- Identifies new ideas, solutions, or directions in dealing with daily situations.
- Displays a high level of curiosity and translates it into new approaches to solutions.
- Translates adversity into opportunities for improvement.



EVALUATION PLANNING WORKSHEET

Employee Development

Employee Name:	Lisa Sigurslid	Date:	
Job Title:	Human Resources Mgr.	Reports To:	City Administrator
Department:	Administration	Date in Position:	10/15/2001
Division:	Human Resources	Supervisory:	Yes

Position Description

- _____ The position description has been reviewed by both the employee and the supervisor and **IS** an accurate reflection of the current job responsibilities.
- _____ The position description has been reviewed by both the employee and the supervisor and is **NOT** an accurate reflection of the current job responsibilities. Changes have been forwarded to human resources.

General Competencies

The Employee Development Reference Guide has been reviewed, and together the following competencies have been selected for the upcoming evaluation period. (minimum: 5 maximum: 7)

- | | |
|---|--|
| <input type="checkbox"/> Attention to Detail | <input type="checkbox"/> Problem Solving/Analytical Thinking |
| <input type="checkbox"/> Collaboration | <input type="checkbox"/> Technical Expertise |
| <input type="checkbox"/> Communication | <input type="checkbox"/> Reliability |
| <input type="checkbox"/> Customer Focus | <input type="checkbox"/> Integrity |
| <input type="checkbox"/> Results | <input type="checkbox"/> Flexibility |
| <input type="checkbox"/> Job-Focused Learning | <input type="checkbox"/> Basic Computing Skills |
| <input type="checkbox"/> Organizational Understanding | <input type="checkbox"/> Interpersonal Relationships & Respect |
| <input type="checkbox"/> Planning and Organizing | <input type="checkbox"/> Innovation |

Goals

Together, the employee and supervisor will develop a list of goals for the evaluation period. These may be a combination of short and long-term goals. The goals identified should follow the SMART format:

Specific, Measurable, Achievable, Relevant, Time-bound

Goal #1	
Goal #2	
Goal #3	

Employee Signature

Date

Supervisor Signature

Date

