



19 AUG 2016

Mr Jeremy Roundill
fyi-request-4196-4b2e27ac@requests.fyi.org.nz

Dear Mr Roundill

On 1 July 2016, we received your email to the Ministry requesting, under the Official Information Act 1982, the following information:

1. A list of all performance indicators, with key performance indicators marked, for each different role within Work and Income including, but not limited to,

- (a) Case Managers - separated by the different case manager roles (i.e. those working with clients with disabilities, Youth Service, etc.)*
- (b) Call Centre Workers - again separated by the different roles within that*
- (c) Service Centre Managers*
- (d) Assistant Service Centre Managers*
- (e) Trainers*

2. For each of the performance indicators, for each of the roles;

- (a) The targets set in place*
- (b) Any minimum targets*
- (c) The average for each role*
- (d) The maximum achieved*

The Ministry values strong staff performance, as this enables us to deliver on expected outcomes, make sure the expectations of our key stakeholders are met, and lead social development in New Zealand.

The Performance Development and Assessment (PDA) system has been developed to support clear, supportive and constructive communication between managers and staff about performance expectations, standards, and ongoing training and development.

The PDA system:

- shows people how their role supports the Ministry's vision and outcomes
- values and recognises people's contribution
- encourages open communication between managers and staff
- ensures people understand what's expected of them
- encourages performance and behaviour that is in line with our values

- encourages regular feedback and coaching
- recognises strengths and focuses on training and development.

Please find enclosed seven PDA templates, containing full performance indicator details, for the following job positions:

- Case Manager, Local Services, Senior Services
- Case Manager, Housing
- Case Manager, Integrated Services
- Customer Service Representative, Contact Centre
- Training Manager, Contact Centre
- Trainer, Contact Centre
- Trainer, Service Centre

Further to the PDA for individual Contact Centre Customer Service Representatives, enclosed, the following Key Performance Indicators are set for the Contact Centre as a whole.

Call Handling Time	6:20 mins
Service Level (average speed of answer)	<100 Seconds <3% under 10 mins
Client Satisfaction	85%
Adherence	100%
Compliance	92%
Call Assessment (quality checks)	95%
Financial Actions (quality checks)	95%
Sick leave	<6%

The information outlined above and contained in the enclosed PDAs addresses question 1 of your request in full, as well as parts (a) and (b) of question 2.

In response to parts (c) and (d) of question 2 of your request, I can advise that individual performance is measured on a case-by-case basis between managers and their staff, and the Ministry does not report on "an average for each role" or "maximum achieved".

In order to provide you with this information Ministry staff would have to manually review thousands of files. As such I refuse your request under section 18(f) of the Official Information Act. The greater public interest is in the effective and efficient administration of the public service.

I hope you find this information regarding Performance Development and Assessments helpful. You have the right to seek an investigation and review of my response by the Ombudsman, whose address for contact purposes is:

The Ombudsman
Office of the Ombudsman
PO Box 10-152
WELLINGTON 6143

Yours sincerely



Ruth Bound
**Deputy Chief Executive
Service Delivery**



Performance Development and Assessment System

Staff Member's Name:	
Position:	Case Manager, Local Services, Senior Services
Manager's Name:	

Review Period: _____ to _____

Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
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(Manager) (Staff Member)

Date Performance Review Completed:	
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Performance Review Agreed: (Refer to page 23 of the guidelines)	Yes / No
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(Manager) (Staff Member)

Overall rating:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

<p>Needs Improvement</p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p>Substantially Achieved</p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p>Expectation Achieved</p> <p>Key deliverable and agreed measure(s) met.</p>	<p>Exceeded Expectation</p> <p>Key deliverables and measure(s) exceeded.</p>
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<p>Client Service</p> <p><i>You will provide all clients with a full and professional service at every contact</i></p> <ul style="list-style-type: none"> • Demonstrates total commitment to client service • Champions Senior Services strategies e.g. (apply online) • Responds accurately and professionally to any request for information and assistance • Role models the Ministry's purposes and principles as well as Seniors Values and service charter • Provides initial screening to determine clients' eligibility for social housing and general housing-related options and advice 	<ul style="list-style-type: none"> • Documentation meets business standards • Follow-up action is recorded and completed in an appropriate timeframe • Full and correct entitlement is identified through the quality system i.e. letter checks, phone calls, processing, observation and feedback, client interview and follow-up process as determined • Compliments and positive feedback are received from clients, colleagues and management Assess and provide home visiting services to clients • Connects clients to community-based services such as hospitals, Age Concern and rest homes • Provides ongoing client support with relevant advice/support, referrals to appropriate agencies and access to additional entitlements/grants/subsidies • Assists older people into work/community organisations as required • Maintains appointment availability to meet national standards including resulting appointments • Key performance indicators have been met
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

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Work Approach

Understands and adheres to the site specific and nationally agreed best practice and procedure

- Understands and adheres to the daily office organisational response including systems and processes
 - Maintains a high productivity level while maintaining high quality
 - Proactive in review of work approach to improve performance
 - Fully utilises the correct resources – tools and people for a positive outcome
 - Ability to prioritise and manage time effectively
 - Role models the Ministry's purposes and principles as well as Seniors Values and service charter
 - Displays an awareness of the Area team environment
 - Understands and adheres to best practice document
- Self management and time management skills displayed e.g.
 - Timesheets completed weekly
 - Leave forms completed
 - Prior to planned leave
 - Day after unplanned leave
 - Out of office assistant and voice messaging system used for planned leave.
 - Quality team requests are completed by due date each month
 - Unverifiables are actioned by the end of following month
 - Information requests from third parties completed by due date
 - ID requests completed by deadline
 - Workflow tasks managed to meet timeliness standards
 - Office standards are met, e.g. Health, Safety and Security guidelines etc
 - Feedback and observation
 - KPI's met
 - Understands and contributes to workflow management
 - Uses tools/support available for self-learning
 - Best practices are applied and shared
 - Principles and values demonstrated
 - 90% of all debtors are repaying debt (Area result achieved)

Self Assessment:

Manager's Comment:

Rating:

Public Relations and Communications

Coordination and delivery of meetings/presentations to Seniors and related audiences

- Effective delivery and participation in Seniors programmes or initiatives, eg expos, Positive Ageing Groups
- Responsive to external agency requests for information.
- Effective delivery of the relationship management strategy in the region
- Role models the Ministry's purposes and principles as well as Seniors Values and service charter

- Active participation in Seniors events evidenced or support provided to allow team members to participate in community activities
- Relationship management strategy understood and appropriate relationships are established, referrals and escalations completed
- Participation in collaborative working models across relevant agencies/community groups where applicable
- Active delivery of key strategies within the business plan e.g. marketing and promotion of SGC, client email addresses and on-line services
- Principles and values demonstrated

Self Assessment:

Manager's Comment:

Rating:

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<p>Teamwork</p> <p><i>Works willingly with others to help the team to achieve goals</i></p> <ul style="list-style-type: none"> • Actively looks to improve current work practices • Working effectively within Seniors, across Students, Seniors and Integrity Services, and the wider MSD where appropriate • Actively and constructively participates in planning, developing and implementation of team and organisational goals and initiatives • Is aware of the team environment and the impact of personal actions upon the team • Understands how others work • Shows a willingness to assist others • Role models the Ministry's purposes and principles as well as Seniors Values and service charter 	<ul style="list-style-type: none"> • Feedback and observation confirms: <ul style="list-style-type: none"> - a high level of self awareness (Team fit) - participation and working effectively with others - sharing of knowledge - is receptive to constructive feedback - shows initiative - management of working relationships - supporting/champion team and organisational goals • Specific participation effectively demonstrated e.g workshops, feedback etc • Has effectively contributed to team outcomes locally and nationally • Positive attitude within the team creating better outcomes, solution focused • Practicing and sharing best practice initiatives • Feedback and observation support a positive attitude and contribution to the staff well being within the team • Willingness to assist with activities from within Local Services, Specialised Processing Services or Seniors Support Centre • Principles and values demonstrated
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

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<p>Key Performance Indicators</p> <p><i>Works to achieve key performance indicators:</i></p> <ul style="list-style-type: none"> • Accuracy • Timeliness • Client Satisfaction 	<ul style="list-style-type: none"> • 90% of all client entitlements are correctly identified and processed • 85-90%% of all benefit entitlement assessments are completed within 5 days of receipt of application • No more than 5% of cases submitted for quality checking remain at unverifiable. • 90-95%% of clients are “very satisfied” or “satisfied” with the service received (Area result achieved)
<p>Self Assessment:</p>	
<p>Manager’s Comment:</p>	<p>Rating:</p>

Stretch objectives Library

Area experts

- Provides on-going advice and support to colleagues
- Provides on-going advice and support to LSM as required
- Delivers team training during Wed Brief sessions (including conference calls)
- Processes more complex actions on behalf of the team and provides feedback to CM's and LSM.

Portfolio Management for example:..

- Seniors Support Centre call integration work
- SGC promotion
- Workload management

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Success Factors – refer to page 11 of guidelines

Ratings:

<p>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<p>People Skills <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> • 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

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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 scheduled 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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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Key Successes and Highlights:

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

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Individual Development Plan – refer to page 13 of the guidelines

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

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

Attach coaching notes

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Performance Development and Assessment

Staff Member's Name:	
Position:	Case Manager (Housing)
Manager's Name:	

Review Period:	
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Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
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(Manager)

(Staff Member)

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

(Manager)

(Staff Member)

Overall rating:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

<p>Needs Improvement</p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p>Substantially Achieved</p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p>Expectation Achieved</p> <p>Key deliverable and agreed measure(s) met.</p>	<p>Exceeded Expectation</p> <p>Exceeded the key deliverable and measure(s).</p>
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Key Deliverables	
Participation in Business Practices	
<ul style="list-style-type: none"> • actively and appropriately participates in new initiatives in the business. • promotes online and other self-serve services to clients and influences clients to use these. • contributes positively to the successful implementation of national, regional and site strategies. 	
Self Assessment:	
Manager's Comment:	Rating:
Client Entitlement and Information Management	
<ul style="list-style-type: none"> • 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:	
Manager's Comment:	Rating:
Supporting Client Housing Outcomes	
<p>Takes an active, integrated approach to client engagement, which supports the Ministry's and the Government's performance targets:</p> <ul style="list-style-type: none"> • makes an appropriate individual contribution, as agreed with their manager, to ensure clients have their housing needs met, and to help those who are able to move towards housing independence. • provides support to meet individual housing needs, including the provision of information about Ministry products, services and processes. • shows clear evidence that successful outcomes are achieved as a result of appropriate client engagement. • where appropriate successful referrals are made to external agencies or other parts of the Ministry. 	
Self Assessment:	

Manager's Comment:	Rating:
Key Deliverables	
Timeliness	
Supports the site to achieve service excellence standards:	
<ul style="list-style-type: none"> Assessments - 95% of all housing assessments are completed within 5 working days of receipt of the last piece of information Tenancy Reviews - 95% of clients are contacted every 28 days. provides 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 region/MSD to achieve service excellence standards:	
<ul style="list-style-type: none"> 90% of all client entitlements are correctly identified and processed. 	
Self Assessment:	
Manager's Comment:	Rating:
Service Quality	
Makes individual contribution to service quality by:	
<ul style="list-style-type: none"> 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	
<i>use this section to record any additional result areas or projects you have been responsible for during the year</i>	
What is to be achieved:	
<ul style="list-style-type: none"> 	
Self Assessment:	
Manager's Comment:	Rating:

Success Factors – refer to page 11 of guidelines

Ratings:

<p>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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Success Factors	
<p>People Skills <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>
<p>Communication Skills <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

Success Factors	
Partnerships and Relationship Management <i>Builds a network of contacts both within and beyond Work and Income</i> <ul style="list-style-type: none"> • 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 <i>Uses all resources available in order to deliver successful outcomes.</i> <ul style="list-style-type: none"> • 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 <i>Takes ownership for quality of work.</i> <ul style="list-style-type: none"> • 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:

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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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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<p>Key Successes and Highlights</p>
<p>Self:</p>
<p>Manager's:</p>
<p>Overall Rating Achieved:</p>

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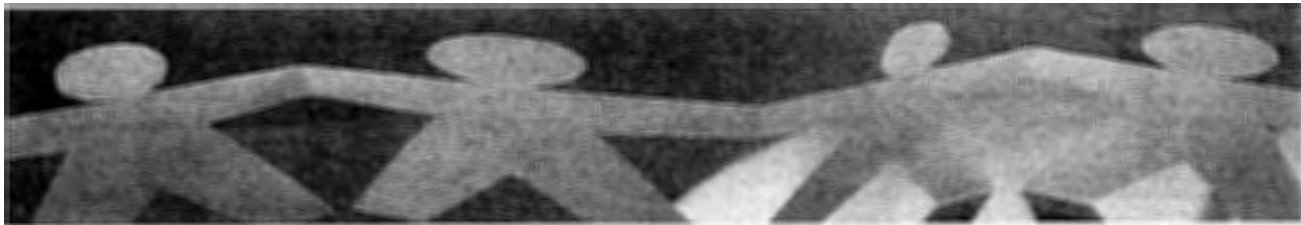
Individual Development Plan – refer to page 13 of the guidelines

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

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

Attach coaching notes

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Performance Development and Assessment

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

Review Period:	
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Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
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(Manager)

(Staff Member)

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

(Manager)

(Staff Member)

Overall rating:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

<p>Needs Improvement</p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p>Substantially Achieved</p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p>Expectation Achieved</p> <p>Key deliverable and agreed measure(s) met.</p>	<p>Exceeded Expectation</p> <p>Exceeded the key deliverable and measure(s).</p>
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Key Deliverables	
<p>Participation in Business Practices</p> <ul style="list-style-type: none"> 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>
<p>Client Development Activities</p> <ul style="list-style-type: none"> 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 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

Key Deliverables	
Client Outcomes	
<p>Takes an active approach to client engagement which supports Work and Income's and the Government's performance targets:</p> <ul style="list-style-type: none"> • clients receive the right level of support and are committed to achieving goals • child development and safety needs are met • clients are independent and self-reliant and have improved social, health, education and employment outcomes as a result of the family plan and the ISR contribution 	
Self Assessment:	
Manager's Comment:	Rating:
Relationship Management/Networking	
<ul style="list-style-type: none"> • 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 • works collaboratively with community and government agencies to provide joined up solutions that contribute to the successful outcomes for the client • ongoing 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:
Timeliness	
<ul style="list-style-type: none"> • supports the site to achieve service excellence standards: <ul style="list-style-type: none"> • 90% of all benefit entitlement assessments in the service centre are completed within 5 days of receipt. • 95% of job seekers with current work obligations have a RecruitMe profile completed within 24 hours of granting a new application • client outcomes as contained in the client's integrated services plan are achieved within agreed timelines • all mandatory process for recording client information is completed in the required time frame. • 95% - 100% of all clients who are enrolled in CST have an assessment completed within four weeks • ISR Reports submitted within required timeframes • referrals to other agencies/service providers are made in a timely manner 	
Self Assessment:	
Manager's Comment:	Rating:

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>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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Success Factors	
<p>People Skills <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> • 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>
<p>Communication Skills <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> • 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

Success Factors	
<p>Partnerships and Relationship Management <i>Builds a network of contacts both within and beyond Work and Income</i></p> <ul style="list-style-type: none"> • 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:
<p>Maximising Knowledge and Application <i>Uses all resources available in order to deliver successful outcomes.</i></p> <ul style="list-style-type: none"> • 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:
<p>Being Accountable <i>Takes ownership for quality of work.</i></p> <ul style="list-style-type: none"> • 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:**

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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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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Key Successes and Highlights	
Self:	
Manager's:	
Overall Rating Achieved:	

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Individual Development Plan – refer to page 13 of the guidelines

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

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

Attach coaching notes

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Performance Development and Assessment

Staff Member's Name:	
Position:	Customer Service Representative
Manager's Name:	

Review Period:	
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Employees Comments:

Managers Comments:

Date Key Deliverables agreed:	
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(Manager)

(Staff Member)

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

(Manager)

(Staff Member)

Overall rating:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

<p>Needs Improvement</p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p>Substantially Achieved</p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p>Expectation Achieved</p> <p>Key deliverable and agreed measure(s) met.</p>	<p>Exceeded Expectation</p> <p>Exceeded the key deliverable and measure(s).</p>
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Key Deliverables	
<p>Client Service</p> <ul style="list-style-type: none"> ensures client referrals meet contact centre standards and requirements all clients needs are met and resolved on initial contact where appropriate – one call resolution feedback indicates referrals are accurate provides clients with up to date information on products and services in accordance with relevant legislation and policy clients are provided with access to their full and correct entitlements according to their needs adheres to relevant legislation and policy provides initial screening to determine clients' eligibility for social housing and general housing-related options and advice. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>
<p>Client Management</p> <ul style="list-style-type: none"> manages client phone calls confidently and professionally ensuring outcomes meet client needs calls follow a logical progression, remain on track and focused uses appropriate tone and language to support client interactions actively listens to clients and checks for understanding, questioning and paraphrasing appropriately ensures processing actions support client outcomes manage outbound calls confidently and professionally to meet the intent of the campaign 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</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:**

Key Deliverables

Accuracy

- meets contact centre call assessment target of 95%
- Meets contact centre action assessments target of 95%

Self Assessment:

Manager's Comment:

Rating:

Client Satisfaction

- makes an individual contribution to client satisfaction results of the contact centre in line with Work and Income Service Standards
- ensures effective resolution of client enquiries

Self Assessment:

Manager's Comment:

Rating:

Optional Key Deliverable

Online Services (as applicable)

- ability to efficiently diagnose a client's online services issue by using effective communication skills and referring to the trouble shooting knowledge base
- ensures clients are provided with an effective solution to the online services issue they have experienced
- escalates Online Services issues, that require an IT intervention, through the agreed escalation processes as outlined in the Online Services knowledge base.
- manage contacts accurately and in a timely and effective manner.

Self Assessment:

Manager's Comment:

Rating:

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:

<p>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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Success Factors

<p>People Skills</p> <p><i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>
<p>Communication Skills</p> <p><i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> 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 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</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:

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 <i>(please note this success factor is optional not applicable to all roles)</i>	
<ul style="list-style-type: none"> 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 <i>(please note this success factor is optional not applicable to all roles)</i>	
<ul style="list-style-type: none"> 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 <i>(applies only to people with staff management responsibilities)</i>	
<ul style="list-style-type: none"> 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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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<p>Key Successes and Highlights</p>
<p>Self:</p>
<p>Manager's:</p>
<p>Overall Rating Achieved:</p>

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Individual Development Plan – refer to page 13 of the guidelines

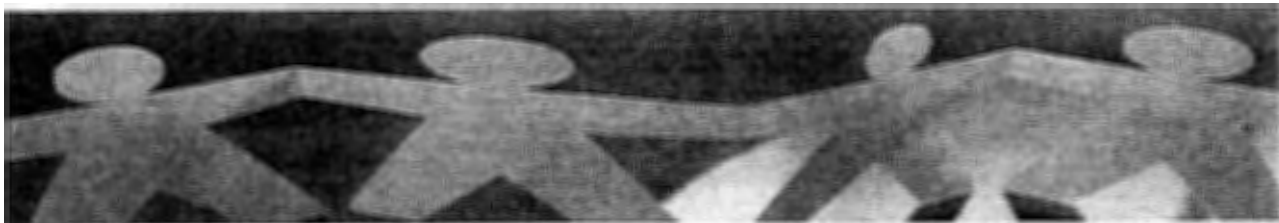
Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager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

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

Attach coaching notes

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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:	
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(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:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

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

Self Assessment:

Manager's Comment:

Rating:

Project Delivery

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:

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

Self Assessment:

Manager's Comment:

Rating:

Qualification and assessment

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

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

<ul style="list-style-type: none"> • 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	
<p>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:</p> <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • • • • • 	
Self Assessment:	
Manager's Comment:	Rating:

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Ratings:

<p>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<p>People Skills <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> • 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</p>

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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:
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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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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Key Successes and Highlights:

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

RELEASSED 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.

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

Attach coaching notes

OFFICIAL INFORMATION ACT

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OFFICIAL INFORMATION ACT



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:	
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(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:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

<p>Needs Improvement</p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p>Substantially Achieved</p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p>Expectation Achieved</p> <p>Key deliverable and agreed measure(s) met.</p>	<p>Exceeded Expectation</p> <p>Exceeded the key deliverable and measure(s).</p>
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Facilitation of site training activities	
<p>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:</p> <ul style="list-style-type: none"> 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	
<p>Site training resources are reviewed, updated and relevant to the needs of the Contact Centre. Activities include:</p> <ul style="list-style-type: none"> Reviewing training materials to ensure that they remain relevant and technically correct and builds scenarios / exercises that help reinforce the training and support delivery. Ensuring that training databases are renewed prior to each training event and maintains training files, records and other information of staff and candidates progress. Monitoring and maintaining training bases to ensure information is up to date and the integrity of the system is maintained. 	
Self Assessment:	

Manager's Comment:	Rating:
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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:

Manager's Comment:	Rating:
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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:

Manager's Comment:	Rating:
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Qualification and assessment	
<p>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:</p> <ul style="list-style-type: none"> • Ensuring 80% of staff enrolled in a qualification programme complete the qualification • Delivering qualification workshops in accordance with scheduled times allocated by the Operations team • Liaising with Operations Team to organise catch up sessions where needed for staff • 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	
<p>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:</p> <ul style="list-style-type: none"> • 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 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:

Success Factors – refer to page 11 of guidelines

Ratings:

<p>Needs Development</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>Competent</p> <p>Demonstrates the appropriate behaviours.</p>	<p>Strength</p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<p>People Skills <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> • 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. 	
<p>Self Assessment:</p>	
<p>Manager's Comment:</p>	<p>Rating:</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:****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>Needs Improvement</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>Expectations Achieved</p> <p>Key deliverables are predominately 'Expectation Achieved' and success factors are predominately 'Competent'. A strong contributor.</p>	<p>Exceeding Expectations</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>Outstanding</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>
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Key Successes and Highlights:

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

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Individual Development Plan – refer to page 13 of the guidelines

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Attach coaching notes

OFFICIAL INFORMATION ACT



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:	
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_____ *(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:	
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Key Deliverables – refer page 8 of guidelines

Ratings:

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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

- 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

Self Assessment:

Manager's Comment:

Rating:

Accuracy

- maintains accurate individual and team quality data
- reports submitted to the service centre manager on the performance of case managers against expected quality standards

Self Assessment:

Manager's Comment:

Rating:

Client satisfaction

- 85% of the service centre's clients are "very satisfied" or "satisfied" with the service received (service centre result)
- maintains service excellence standards as per the service excellence standards guidelines

Self Assessment:

Manager's Comment:

Rating:

Success Factors – refer to page 11 of guidelines

Ratings:

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Self Assessment:

Manager's Comment:

Rating:

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Key Successes and Highlights:

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

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