



**MINISTRY OF SOCIAL  
DEVELOPMENT**

TE MANATŪ WHAKAHIATO ORA

- 1 DEC 2016

Mr Jeremy Roundill  
[Jeremy.roundill@gmail.com](mailto:Jeremy.roundill@gmail.com)

Dear Mr Roundill

On 12 October 2016 you emailed the Ministry requesting, under the Official Information Act 1982, the following information:

- *A list of all performance indicators, with key performance indicators marked, for each different role within Work and Income.*

Performance management helps create an environment where staff are encouraged and supported to perform at the best of their abilities and be recognised for that performance. This helps the Ministry to turn its Statement of Intent into action and to ensure that the day-to-day work supports its vision, purpose and values and delivers the outcomes expected by the Government.

On 19 August 2016, you received the Performance Development and Assessment templates with performance indicator details for three Case Manager roles, the Customer Service Representative Contact Centre role, three training roles and the Work Broker role. The majority of Service Delivery's frontline staff are employed in these positions.

The templates provided to you include performance indicators set at a national level which are applicable to all these position-holders. Other performance indicators and individual measures may also be agreed between an employee and their manager. These may take into consideration any regional or local strategies and initiatives the employee may be participating in. Therefore the definition of good performance at a local level may vary depending on the regional and/or local strategies and initiatives in place during the performance year.

Human Resources have identified 25 roles within Work and Income that have nationally set Key Performance Indicators (KPIs) or Key Deliverables. Enclosed is a table that shows each of the 25 positions that have nationally set goals with a summary of the KPIs. Also enclosed are copies of the position descriptions for those 25 Work and Income roles that include more details about the KPIs for those roles.

Staff in other Work and Income roles develop and mutually agree in conjunction with their manager their own KPIs.

Performance indicators for management roles are generally agreed between an employee and their manager, based on the key strategies and initiatives relevant to the current performance year. Performance records are retained by an employee and their manager and are not recorded centrally or nationally.

In the Ministry's email to you dated 1 November 2016, the Ministry included a link to an internal intranet site which is not accessible from outside the Ministry, so please now find enclosed the Individual Development Plan from 'On Track', the personal development tool used by Service Centre Managers and Assistant Service Centre Managers. Service Delivery Managers have a Success Profile (attached for your reference) with competencies critical to effectiveness in the role.

The principles and purposes of the Official Information Act 1982 under which you made your request are:

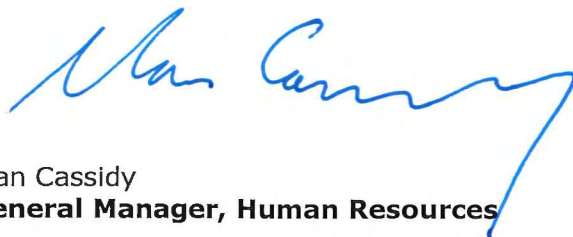
- to create greater openness and transparency about the plans, work and activities of the Government,
- to increase the ability of the public to participate in the making and administration of our laws and policies and
- to lead to greater accountability in the conduct of public affairs.

This Ministry fully supports those principles and purposes. The Ministry therefore intends to make the information contained in this letter and any attached documents available to the wider public after ten working days. The Ministry will do this by publishing this letter and attachments on the Ministry of Social Development's website. Your personal details will be deleted and the Ministry will not publish any information that would identify you as the person who requested the information.

If you wish to discuss this response with us, please feel free to contact [OIA\\_Requests@msd.govt.nz](mailto:OIA_Requests@msd.govt.nz).

If you are not satisfied with this response you have the right to seek an investigation and review by the Ombudsman. Information about how to make a complaint is available at [www.ombudsman.parliament.nz](http://www.ombudsman.parliament.nz) or 0800 802 602.

Yours sincerely



Alan Cassidy  
**General Manager, Human Resources**

# Service Manager Success Profile

**The 'must have' competencies. What top performers do well.**

## **Lead from the Front**

- Builds a Strong Team
- Develops People
- Motivates through Vision and Purpose

## **Looks Ahead**

- Translates Strategy into Action
- Navigates through Ambiguity
- Builds Partnerships

## **Manages our Business**

- Results Driven
- Manages and Measures Work

## **Foundational**

- Integrity and Trust
- Client Focused
- Courage to Tackle Issues yet Approachable
- Well Organised

## Service Manager Success Profile – Definitions

(based on Lominger Competency Model)

<b>Builds a Strong Team</b>
<p><b>What it looks like</b></p> <p>Blends people into teams when needed; creates strong morale and spirit in his/her team; shares wins and successes; fosters open dialogue; lets people finish and be responsible for their work; defines success in terms of the whole team; creates a feeling of belonging in the team.</p>
<b>Develops People</b>
<p><b>What it looks like:</b> Provides challenging stretching tasks and assignments; holds frequent development discussions; is aware of each person's career goals; constructs compelling development plans and executes them; pushes people to accept developmental moves; will take on those who need help and further development; cooperates with the developmental system in the organisation; is a people builder.</p>
<b>Motivates through Vision and Purpose</b> (Lominger equivalent Managing Vision and Purpose)
<p><b>What it looks like:</b> Communicates a compelling and inspired vision or sense of core purpose; talks beyond today; talks about possibilities; is optimistic; creates mileposts and symbols to rally support behind the vision; makes the vision sharable by everyone; can inspire and motivate entire units or organisations.</p>
<b>Translates Strategy into Action</b> (Lominger equivalent is Strategic Agility)
<p>Sees ahead clearly; can anticipate future consequences and trends accurately; has broad knowledge and perspective; is future oriented; can articulately paint credible pictures of what is likely</p>
<b>Navigates through Ambiguity</b> (Lominger equivalent is Dealing with Ambiguity)
<p><b>What it looks like:</b> Can effectively cope with change; can shift gears comfortably; can decide and act without having the total picture; isn't upset when things are up in the air; can comfortably handle risk and uncertainty.</p>
<b>Builds Partnerships</b> (Lominger equivalent is Peer Relationships)
<p><b>What it looks like:</b> easily gains trust and support of other groups/agencies Can quickly find common ground and solve problems for the good of all parties; can represent Ministry interests and yet be fair to other groups; can solve problems with other groups with a minimum of noise; is seen as a team player and is cooperative; encourages collaboration.</p>
<b>Results Driven</b>



**What it looks like:** Can be counted on to exceed goals successfully; is constantly and consistently one of the top performers; very bottom-line oriented; steadfastly pushes self and others for results.

**Manages and Measures Work**

Clearly assigns responsibility for tasks and decisions, sets clear objectives and measures, monitors process, progress and results; designs feedback loops into work.

**Foundational Competencies** (Price of Admission) – not unique to the role, and expected to already bring to the role.

**Integrity and Trust**

Is widely trusted; is seen as a direct, truthful individual; can present the unvarnished truth in an appropriate and helpful manner; keeps confidences; admits mistakes; doesn't misrepresent him/herself for personal gain.

**Client Focused** (Lominger equivalent is Customer Focus)

Is dedicated to meeting the expectations and requirements of external clients; gets first-hand client information and uses it for improvements in products and services; acts with clients in mind; establishes and maintains effective relationships with clients and gains their trust and respect

**Courage to Tackle Issues yet Approachable** (Lominger equivalent is Managerial Courage plus Fairness to Direct Reports)

Doesn't hold back anything that needs to be said; provides current, direct, complete, and "actionable" positive and corrective feedback to others; lets people know where they stand; faces up to people problems quickly and directly; is not afraid to take negative action when necessary. But at the same time is also:

Easy to approach and talk to, makes extra effort to put others at ease, builds rapport well, is a good listener, can be warm, pleasant and patient with the personal problems and anxieties of others

**Well Organised** (Lominger equivalent is Time Management)

**What it looks like**

Uses his/her time effectively and efficiently; values time; concentrates his/her efforts on the more important priorities; gets more done in less time than others; can attend to a broader range of activities.

**Work and Income Key Performance Indicators for Service Delivery roles**

Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Administration Officer Claims Processing Unit</b>	Administration and Office Support	Information Management	Premises and Health and Safety	Business Support for National Claims Processing Unit				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Case Manager</b>	Participation in Business Practices	Client Development Activities	Client Outcomes	Timeliness	Accuracy	Service Quality		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Case Manager (Housing)</b>	Participation in Business Practices	Client Entitlement and Information Management	Supporting Client Housing Outcomes	Timeliness	Accuracy	Service Quality		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Childcare / Centralised Processing Officer</b>	Processing	Quality Assurance	Service Excellence - Timeliness	Service Excellence - Accuracy	Service Excellence - Client Satisfaction			People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Claims Processing Officer</b>	Agreement Administration / Claims Processing	Agreement / Claims Follow Up Actions	Administration / Information Management	Customer Service And Support				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Contact Centre Officer</b>	Client Service	Client Entitlement and Information Management	Supporting Client Housing Outcomes	Use of Resources	Right Time/Right Place	Accuracy	Client Satisfaction	People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

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Key Hyverable	Key Deliverable	Success Factors
		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
racy	Client Satisfaction	People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity



Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Executive Administrator (Contact Centre)</b>	Staff Management	Secretarial and Administrative Support	Finance	Human Resources	Contribution to Projects			People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Health and Disability Coordinator</b>	Service Excellence - Client Satisfaction	Service Excellence - Timeliness	Service Excellence - Provider liaison	Service Excellence - Specialist knowledge				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Integrated Services Case Manager</b>								People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

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Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Intensive Client Support Manager</b>	Participation in Business Practices	Client Development Activities	Client Outcomes	Relationship Management/Networking	Timeliness	Accuracy	Service Quality	People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Regional Disability Advisor</b>	Advisory Service	Relationship Management	Timeliness	Planning				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Regional Health Advisor</b>	Advisory Service	Relationship Management	Timeliness	Planning				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

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Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Service Centre Trainer</b>	Quality Monitoring	Quality Culture	Service Excellence - Timeliness					People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Service Quality Officer</b>	Quality Monitoring	Quality Culture	Service Excellence - Timeliness	Service Excellence - Accuracy	Service Excellence - Client Satisfaction			People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Specialist Case Worker</b>	Participation in Business Practices	Client Development Activities	Client Outcomes	Timeliness	Accuracy	Service Quality		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

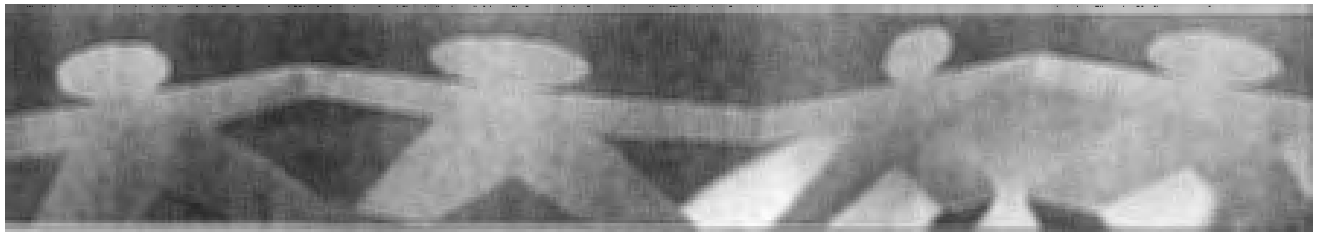
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Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Support Officer (Contact Centre)</b>	Mail Administration	Building & Equipment administration	General administration	Financial Administration	Human Resources Administration	Building Security/Setting up for New Recruits		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Technical Officer</b>	Client Entitlement and Information Management	Supporting Client Housing Outcomes	Use of Resources	Timeliness	Right Time/Right Place	Accuracy	Client Satisfaction	People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Trainer (Contact Centre)</b>	Facilitation of site training activities	Maintenance of Resources	Capability Development	Project Delivery	Qualification and assessment	National level contribution		People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity



Role Title	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Key Deliverable	Success Factors
<b>Training Manager (Contact Centre)</b>	Management of site training activities	Capability Development	Project Delivery	Qualification and assessment	National level contribution			People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity
<b>Work Broker-Service Centre</b>	Labour Market Activities	Employer Engagement	Vacancy Management Outcomes	Client Outcomes				People Skills Communication Skills Partnerships & Relationship Management Maximising Knowledge and Application Being Accountable Public Service Integrity

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**Performance Development and Assessment**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Technical Officer
<b>Manager's Name:</b>	

<b>Review Period:</b>	
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<b>Employees Comments:</b>	

<b>Managers Comments:</b>	

<b>Date Key Deliverables agreed:</b>	
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\_\_\_\_\_  
(Manager)

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

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

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

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

<b>Overall rating:</b>	
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**Key Deliverables** – refer page 8 of guidelines

**Ratings:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
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<b>Key Deliverables</b>	
<b>Client Entitlement and Information Management</b>	
<ul style="list-style-type: none"> <li>assesses and processes a variety of transactions including entitlements for clients in accordance with legislation, policy and practice.</li> <li>appropriate systems are updated with accurate information about client housing needs.</li> <li>ensures, where possible, that all client needs are addressed and appropriate referrals made</li> <li>ensures that transactions are processed accurately.</li> <li>actions relating to provision of client information are processed with the necessary data recorded and correspondence issued and managed appropriately.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Supporting Client Housing Outcomes</b>	
<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"> <li>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.</li> <li>ensures that referrals and placements into social housing meet legislation, policy and practice standards.</li> <li>provides support to meet individual housing needs including the provision of information about Ministry products, services and processes.</li> <li>shows clear evidence that successful outcomes are achieved as a result of appropriate client engagement.</li> <li>where appropriate successful referrals are made to external agencies or other parts of the Ministry.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Key Deliverables</b>	
<b>Use of Resources</b>	
<ul style="list-style-type: none"> <li>utilises resources to ensure information and decisions are correct</li> <li>uses reporting and workflow tools to ensure timely processing of transactions</li> <li>uses applications to record information and fully inform clients</li> <li>uses tools and resources to ensure efficiency in the job</li> </ul>	

<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Timeliness</b> <ul style="list-style-type: none"> <li>• meets Centralised Unit Housing average processing time target, as agreed with manager</li> <li>• Contributes to site target of 95% of all transactions completed within 5 working days of receipt of the last piece of information</li> <li>• provides a timely response to work requests and can adapt to shifting demands on a daily basis.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Right Time/Right Place</b> <ul style="list-style-type: none"> <li>• meets roster requirements and understands the necessity of complying with the roster</li> <li>• meets 100% adherence target</li> <li>• meets 92% compliance target</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Key Deliverables</b>	
<b>Accuracy</b> <ul style="list-style-type: none"> <li>• 95% of all client entitlements are correctly identified and processed.</li> <li>• 95% accuracy for the calculation and activation of IRR</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

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<b>Client Satisfaction</b>	
<ul style="list-style-type: none"> <li>• makes an individual contribution to client satisfaction results for the centralised unit in line with Ministry Service Standards</li> <li>• ensures effective resolution of client enquiries</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Optional Key Deliverable</b>	
<b>Quality Assurance/ Buddying/ Expert (as applicable)</b>	
<ul style="list-style-type: none"> <li>• quality assurance/ buddying/ expert (as applicable)</li> <li>• completes quality activities and checks work according to site or national quality assurance plans,</li> <li>• provides motivational and constructive feedback and coaches others based on quality checks ensuring learning takes place, including follow up</li> <li>• produces timely and informative reports and analysis of quality results and/or training needs when required</li> <li>• prepares analysis of quality trends and issues when required</li> <li>• provides testing/checking of work through sampling and at the direction of management</li> <li>• identifies and recommends continuous improvements to processes and procedures (via the alerts system)</li> <li>• provides information in accordance with policies and procedures followed within the centralised unit</li> <li>• ensures all quality data is entered accurately</li> <li>• contributes to projects, workshops and other activities that improve the performance of the centralised unit</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>ADDITIONAL KEY DELIVERABLE</b>	
use this section to record any additional result areas or projects you have been responsible for during the year	
<b>What is to be achieved:</b>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

## Success Factors – refer to page 11 of guidelines

### Ratings:

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<b>Success Factors</b>	
<p><b>People Skills</b></p> <p><i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>is confident when working with clients and colleagues</li> <li>treats all people with dignity and respect</li> <li>demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>demonstrates the ability to work positively with others to achieve outcomes</li> <li>stays calm, objective, and positive during difficult situations</li> <li>demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Communication Skills</b></p> <p><i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> <li>tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>is able to simplify complex issues when required</li> <li>questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

**Success Factors**

**Partnerships and Relationship Management**

*Builds a network of contacts both within and beyond Work and Income*

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Maximising Knowledge and Application**

*Uses all resources available in order to deliver successful outcomes*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**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:**

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

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

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Ⓞ Attach coaching notes



**Performance Development and Assessment System**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Centralised Processing Officer/Childcare Processing Officer
<b>Manager's Name:</b>	

<b>Review Period:</b>	
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<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
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\_\_\_\_\_  
(Manager)

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

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

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

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

<b>Overall rating:</b>	
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## Key Deliverables – refer page 8 of guidelines

### Ratings:

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

#### Processing

- assesses and processes a variety of transactions including entitlements for clients in accordance to business standards.
- actions relating to provision of client information are processed with necessary data recorded, correspondence issued and managed appropriately.
- ensures mail management and administration functions are completed as required.
- adheres to systems in place to minimise risk and security breaches.
- is mindful of risks and issues for the organisation and escalates as necessary.
- contributes to any projects and initiatives when required.

#### Self Assessment:

#### Manager's Comment:

**Rating:**

#### Quality Assurance (as applicable)

- Buddy expert – as applicable
- 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
- is a role model in the work place
- provides processing officers with correct information in accordance with policies and procedures followed within the CPU
- contributes to projects, workshops and other activities that improve the performance of the CPU

#### Self Assessment:

#### Manager's Comment:

**Rating:**

**SERVICE EXCELLENCE**

**Timeliness**

- assesses and processes work in accordance to the agreed timeframes for the variety of transactions done by the unit
- meets all reporting and monitoring requirements

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Accuracy**

- quality result of 95% is maintained in areas of work processed
- ensure all tasks supporting processing functions are completed to required standards
- meets all reporting and monitoring requirements

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Client satisfaction**

- Client queries are responded to in a timely manner and addressed appropriately
- Builds relationships with key internal and external contacts as required
- Makes an individual contribution to overall client satisfaction

**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE OFFICIAL INFORMATION ACT

**ADDITIONAL KEY DELIVERABLE**

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

**What is to be achieved:**

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**Self Assessment:**

**Manager's Comment:**

**Rating:**

RELEASED UNDER THE  
OFFICIAL INFORMATION ACT



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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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Success Factors	
<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Communication Skills</b>  <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> <li>• tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>• communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>• is able to simplify complex issues when required</li> <li>• questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

## Success Factors

### Partnerships and Relationship Management

*Builds a network of contacts both within and beyond Work and Income*

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

### Maximising Knowledge and Application

*Uses all resources available in order to deliver successful outcomes.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

<b>Success Factors</b>	
<b>Being Accountable</b>	
<i>Takes ownership for quality of work.</i>	
<ul style="list-style-type: none"> <li>• takes responsibility for own workload and appreciates how own behaviour impacts upon others</li> <li>• is reliable, self-disciplined and proactive</li> <li>• readily accepts feedback on performance and applies feedback on the job</li> <li>• manages time effectively to ensure delivery of the best possible service</li> <li>• maintains a strong client focus through periods of change and a positive attitude when working with changes</li> <li>• exercises good judgment and bases all decision on reasoned analysis</li> <li>• thinks about what could go wrong and effectively manages as it relates to risk</li> <li>• consistently produces high quality work</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	
<b>Rating:</b>	
<b>Public Service Integrity</b>	
<i>Is committed to serving the people of New Zealand with honesty and integrity.</i>	
<ul style="list-style-type: none"> <li>• communicates openly and honestly with others</li> <li>• inspires trust in others, and behaves fairly and ethically at all times</li> <li>• respects the confidentiality of client and Ministry information</li> <li>• demonstrates and applies an understanding of the Ministry's vision, purpose and values</li> <li>• adheres to the Ministry's Code of Conduct</li> <li>• models the highest standards of public service behaviour and probity</li> <li>• always acts to enhance the Ministry's reputation</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	
<b>Rating:</b>	
<b>Optional Success Factors</b>	
<b>Training and Facilitation</b>	
<i>(please note this success factor is optional not applicable to all roles)</i>	
<ul style="list-style-type: none"> <li>• implements a structured planning framework that meets the training demands of the service centre/region</li> <li>• uses an appropriate variety of delivery methods to effectively facilitate learning</li> <li>• ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively</li> <li>• applies an understanding of adult learning principles and adult learning styles</li> <li>• evaluates whether the transfer of learning has occurred</li> <li>• undertakes internal marketing of training opportunities where appropriate</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	
<b>Rating:</b>	

**Success Factors**

**Marketing and Negotiation**

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

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Leading People**

*(applies only to people with staff management responsibilities)*

- provides leadership by creating a core sense of purpose and vision
- identifies difficult issues and opportunities and manages these proactively
- clearly communicates expectations and provides coaching and feedback on performance
- is aware of individuals' strengths and uses them as a basis for building capability
- encourages a challenging environment where people are motivated to do their best, while also considering work life balance
- leads and develops effective teams to maximise the contributions of members to achieve successful outcomes
- provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks

**Self Assessment:**

**Manager's Comment:**

**Rating:**

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

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

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

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

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

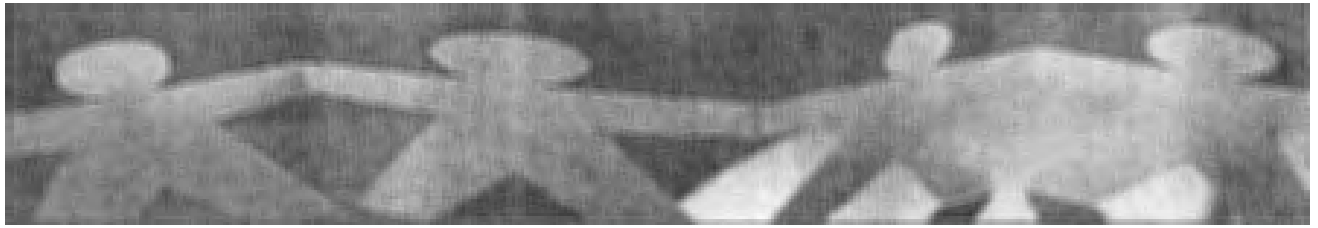
Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager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

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

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Attach coaching notes





**Performance Development and Assessment**

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

<b>Review Period:</b>	
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<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
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\_\_\_\_\_  
(Manager)

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

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

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

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

<b>Overall rating:</b>	
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## Key Deliverables – refer page 8 of guidelines

### Ratings:

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
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<b>Key Deliverables</b>	
<b>Participation in Business Practices</b>	
<ul style="list-style-type: none"> <li>• actively and appropriately participates in new initiatives in the business.</li> <li>• promotes online and other self-serve services to clients and influences clients to use these services.</li> <li>• contributes positively to the successful implementation of national, regional and site strategies.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Client Development Activities</b>	
<ul style="list-style-type: none"> <li>• ensures clients are participating in interventions relevant to their developmental requirements with correct referrals made e.g. referrals to work broker, employment coordinator, seminars, training, contracted services, and other regional/local initiatives.</li> <li>• ensures, where possible, that all client needs are addressed and actions completed during the interview.</li> <li>• develops client plans that demonstrate a clear link between assessment and selected intervention.</li> <li>• case reviews indicate appropriate interventions that demonstrate progress towards independence and these are recorded in a service plan.</li> <li>• makes appropriate referrals to other agencies.</li> <li>• demonstrates working to the appropriate Practice Guide.</li> <li>• provides initial screening to determine clients' eligibility for social housing and general housing-related options and advice.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Client Outcomes</b>	
<p>Takes an active, work focused approach to client engagement, which supports Work and Income's and the Government's performance targets:</p> <ul style="list-style-type: none"> <li>• makes an appropriate individual contribution, as agreed with their manager, to the number of clients supported off-benefit and into employment.</li> <li>• provides job-search support to meet individual needs including employment information, job placement services and access to services (including interventions and activities).</li> <li>• shows clear evidence that successful outcomes are achieved as a result of appropriate referrals to employment and training opportunities.</li> </ul>	
<b>Self Assessment:</b>	

<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Key Deliverables</b>	
<b>Timeliness</b>	
Supports the site to achieve service excellence standards:	
<ul style="list-style-type: none"> <li>• 90% of all benefit entitlement assessments in the service centre are completed within 5 days of receipt of application.</li> <li>• 95% of job seekers with current work obligations have a RecruitMe profile completed within 24 hours of granting a new application.</li> <li>• provide a timely response to work requests and can adapt to shifting demands on a daily basis.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Accuracy</b>	
Supports the site to achieve service excellence standards:	
<ul style="list-style-type: none"> <li>• 90% of all client entitlements are correctly identified and processed.</li> <li>• 90% of RecruitMe profiles are in accordance with accepted quality standards.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Service Quality</b>	
Makes individual contribution to service quality by:	
<ul style="list-style-type: none"> <li>• individual contribution to service quality monitor.</li> <li>• maintains excellent service in line with the national service standards.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>ADDITIONAL KEY DELIVERABLES</b>	
<i>use this section to record any additional result areas or projects you have been responsible for during the year</i>	
<b>What is to be achieved:</b>	
•	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<b>Success Factors</b>	
<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues.</li> <li>• treats all people with dignity and respect.</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others.</li> <li>• demonstrates the ability to work positively with others to achieve outcomes.</li> <li>• stays calm, objective, and positive during difficult situations.</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>
<p><b>Communication Skills</b>  <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> <li>• tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>• communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>• is able to simplify complex issues when required</li> <li>• questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

**Success Factors**

**Partnerships and Relationship Management**

*Builds a network of contacts both within and beyond Work and Income*

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Maximising Knowledge and Application**

*Uses all resources available in order to deliver successful outcomes.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Being Accountable**

*Takes ownership for quality of work.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

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

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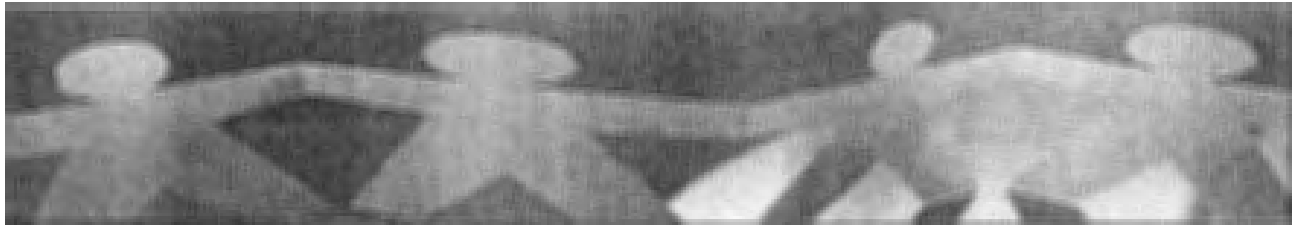
## Individual Development Plan – refer to page 13 of the guidelines

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.

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

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Attach coaching notes



Performance Development and Assessment System

Staff Member's Name:	
Position:	Administration Officer – National Claims Processing Unit
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: (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><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
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**ADMINISTRATION AND OFFICE SUPPORT**

Provide a high standard and timely delivery of administration support, in line with Ministry policy and standards, to ensure the effective day to day operation of the office.

**This includes:**

- Ensuring office supplies and equipment are maintained and operational
- Providing full administrative support to the team, for example:
  - mail and correspondence delivery and action
  - recruitment administration
  - writing correspondence and documents
  - coordination of travel and events
- Administrating effective and accurate hard copy and electronic file storage and retrieval systems, including the training of other staff
- Update and maintain the NCPU desk file

**Self Assessment:**

**Manager's Comment:**

**Rating:**

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**INFORMATION MANAGEMENT**

Recording, reconciling, reporting and monitoring business unit data accurately, using a variety of information systems and processes, meeting communicated timeframes and other Ministry requirements.

This includes:

- CHRIS e.g. attendance, overtime, performance appraisals
- Monitors secondments and acting positions and associated actions
- Contributes to, participates in, and initiates projects with the manager and staff for the betterment of the unit
- Reconciling accounts, CHRIS and other records when required
- Maintain and monitor specific budgets, and track expenditure, when required

Self Assessment:

Manager's Comment:

Rating:

**PREMISES AND HEALTH & SAFETY**

Contribute to recording and reporting on premises and health & safety related issues accurately, with appropriate sign off, and in line with communicated timeframes.

This includes:

- Collate information and report on health and safety, incidents, security, and premise maintenance
- Maintain all relevant registers e.g. key register
- Compiles information for business operational plans e.g. business continuity plan, staff secure plan
- Complete internal control checks

Self Assessment:

Manager's Comment:

Rating:

**BUSINESS SUPPORT FOR NATIONAL CLAIMS PROCESSING UNIT**

Provide business-related support to the National Claims Processing Unit to ensure accurate data processing, tracking and collection, ease of retrieval and analysis, and timely and accurate reporting.

This includes:

- Disaster relief – data tracking and expenditure reporting
- Bank account changes for employers/sponsors for service centres
- Business ownership changes – managing finalisation of outstanding claims and update business information
- Enterprise allowance – ensure agreements and details meet Ministerial guidelines and record
- Technical support – provide assistance to service centre managers and staff e.g. SWIFT/TRACE, network access, card issues, AUM management

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:

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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:**

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**Self Assessment:**

**Manager's Comment:**

**Rating:**

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

RELEASED UNDER THE OFFICIAL INFORMATION ACT



**Communication Skills**

*Communicates clearly and fluently across all forms of communication.*

- tailors communication to the target audience, preparing adequately and utilising appropriate resources
- communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language
- is able to simplify complex issues when required
- asks questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation

**Self Assessment:****Manager's Comment:****Rating:****Partnerships and Relationship Management**

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry

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

**Maximising Knowledge and Application**

*Uses all resources available in order to deliver successful outcomes.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Being Accountable**

*Takes ownership for quality of work.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Public Service Integrity**

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

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Optionals:**

**Training and Facilitation**

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

- implements a structured planning framework that meets the training demands of the service centre/region
- uses an appropriate variety of delivery methods to effectively facilitate learning
- ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively
- applies an understanding of adult learning principles and adult learning styles
- evaluates whether the transfer of learning has occurred
- undertakes internal marketing of training opportunities where appropriate

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Marketing and Negotiation**

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

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

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

*(applies only to people with staff management responsibilities)*

- provides leadership by creating a core sense of purpose and vision
- identifies difficult issues and opportunities and manages these proactively
- clearly communicates expectations and provides coaching and feedback on performance
- is aware of individuals' strengths and uses them as a basis for building capability
- encourages a challenging environment where people are motivated to do their best, while also considering work life balance
- leads and develops effective teams to maximise the contributions of members to achieve successful outcomes
- provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks

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

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

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

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

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

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

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Attach coaching notes



**Performance Development and Assessment**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Contact Centre Officer
<b>Manager's Name:</b>	

<b>Review Period:</b>	
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<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
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\_\_\_\_\_  
(Manager)

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

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

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

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

<b>Overall rating:</b>	
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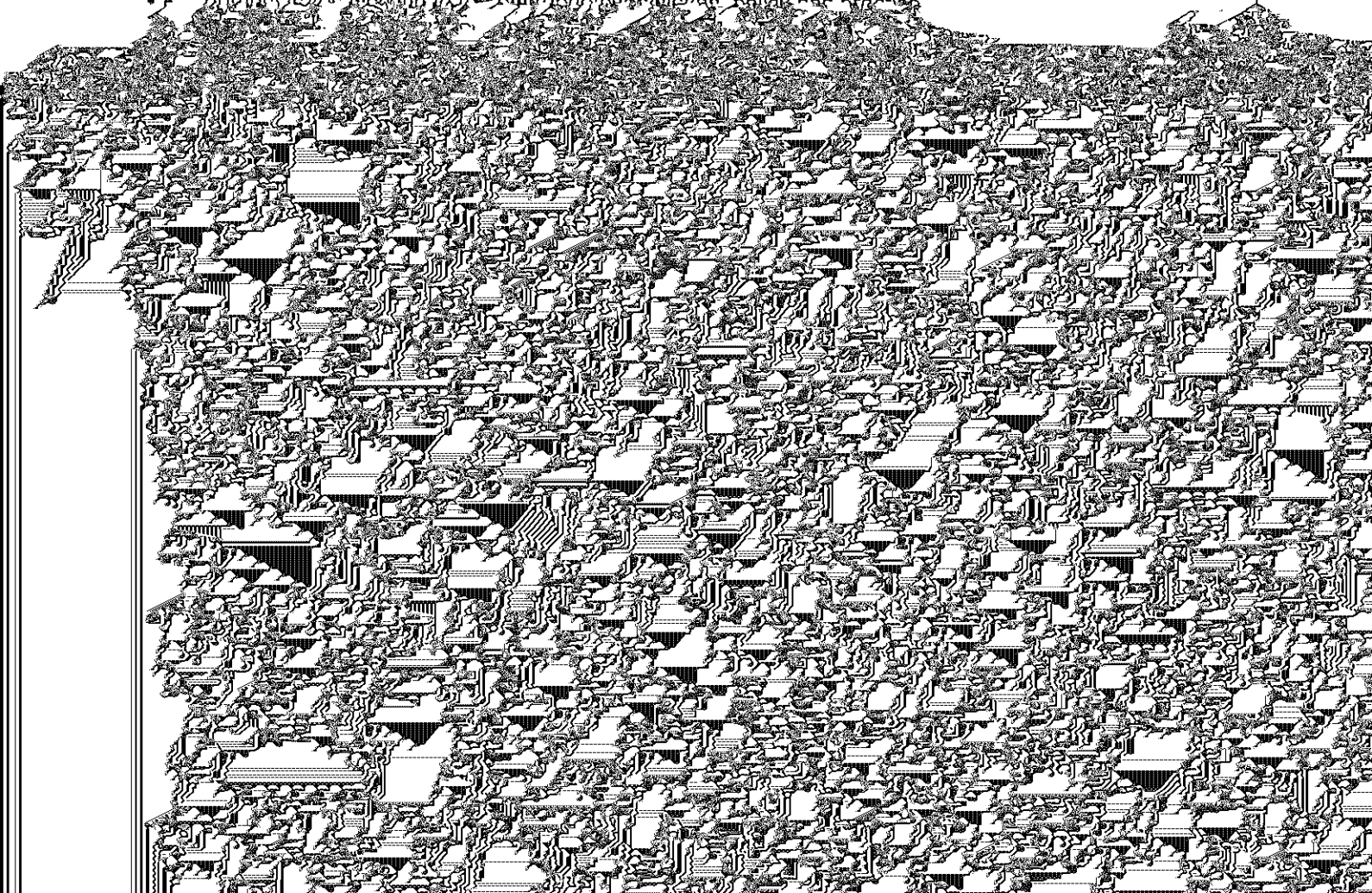
**Key Deliverables** – refer page 8 of guidelines

**Ratings:**

<p><b>Needs Improvement</b></p> <p>Key deliverable not met or partially met, and measure(s) not demonstrated or partly demonstrated.</p>	<p><b>Substantially Achieved</b></p> <p>Key deliverable and measure(s) is mostly met. Considerable progress has been made.</p>	<p><b>Expectation Achieved</b></p> <p>Key deliverable and agreed measure(s) met.</p>	<p><b>Exceeded Expectation</b></p> <p>Exceeded the key deliverable and measure(s).</p>
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<b>Key Deliverables</b>	
<b>Client Service</b>	
<ul style="list-style-type: none"> <li>• at initial contact, all clients' needs are met and resolved where appropriate</li> <li>• systems are updated with accurate information about client housing needs, where appropriate</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Client Entitlement and Information Management</b>	
<ul style="list-style-type: none"> <li>• provides clients with up to date information on MSD products and services in accordance with relevant legislation and policy.</li> <li>• ensures clients receive accurate information about housing options.</li> <li>• ensures, where possible, that all client needs are addressed and actions completed during the housing assessment.</li> <li>• identifies and records options with clients, in line with the goal of progressing them towards independence.</li> <li>• makes appropriate referrals to other agencies</li> <li>• demonstrates working in the current print, legislative, policy and practice</li> </ul>	

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<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Key Deliverables</b>	
<b>Use of Resources</b> <ul style="list-style-type: none"> <li>• utilises resources to ensure information and decisions are correct</li> <li>• uses phone system effectively</li> <li>• uses applications to record information and fully inform clients</li> <li>• uses tools and resources to ensure efficiency in the job</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Timeliness</b> <ul style="list-style-type: none"> <li>• meets Centralised Unit Housing call handling time target, as agreed with manager</li> <li>• 95% of all transactions are completed within 5 working days of receipt of the last piece of information.</li> <li>• provides a timely response to work requests and can adapt to shifting demands on a daily basis.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Right Time/Right Place</b> <ul style="list-style-type: none"> <li>• meets roster requirements and understands the necessity of complying with the roster</li> <li>• accounts for time off the phones during the day</li> <li>• meets 100% adherence target</li> <li>• meets 92% compliance target</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

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**Key Deliverables****Accuracy**

- 95% of all client entitlements are correctly identified and processed.
- meets Call Assessment target of 95%
- meets Screening and Assessment accuracy target of 95%
- 95% accuracy for the calculation and activation of IRR

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

- makes an individual contribution to client satisfaction results for the centralised unit in line with Ministry Service Standards
- ensures effective resolution of client enquiries

**Self Assessment:****Manager's Comment:****Rating:****Optional Key Deliverable****Quality Assurance/ Buddying/ Expert (as applicable)**

- quality assurance/ buddying/ expert (as applicable)
- completes quality activities 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)
- provides information in accordance with policies and procedures followed within the centralised unit
- ensures all quality data is entered accurately
- contributes to projects, workshops and other activities that improve the performance of the centralised unit

**Self Assessment:**

<b>Manager's Comment:</b>	<b>Rating:</b>
<b>ADDITIONAL KEY DELIVERABLE</b> use this section to record any additional result areas or projects you have been responsible for during the year	
<b>What is to be achieved:</b> <ul style="list-style-type: none"> <li>•</li> <li>•</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<b>Success Factors</b>	
<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<p><b>Communication Skills</b>  <i>Communicates clearly and fluently across all forms of communication.</i></p> <ul style="list-style-type: none"> <li>• tailors communication to the target audience, preparing adequately and utilising appropriate resources</li> <li>• communicates clearly and simply (verbally and in writing) using appropriate grammar, style and language</li> <li>• is able to simplify complex issues when required</li> <li>• questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>

**Success Factors**

**Partnerships and Relationship Management**

*Builds a network of contacts both within and beyond Work and Income*

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Maximising Knowledge and Application**

*Uses all resources available in order to deliver successful outcomes.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

<b>Success Factors</b>	
<p><b>Being Accountable</b>  <i>Takes ownership for quality of work.</i></p> <ul style="list-style-type: none"> <li>• takes responsibility for own workload and appreciates how own behaviour impacts upon others</li> <li>• is reliable, self-disciplined and proactive</li> <li>• readily accepts feedback on performance and applies feedback on the job</li> <li>• manages time effectively to ensure delivery of the best possible service</li> <li>• maintains a strong client focus through periods of change and a positive attitude when working with changes</li> <li>• exercises good judgment and bases all decision on reasoned analysis</li> <li>• thinks about what could go wrong and effectively manages as it relates to risk</li> <li>• consistently produces high quality work</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:
<p><b>Public Service Integrity</b>  <i>Is committed to serving the people of New Zealand with honesty and integrity.</i></p> <ul style="list-style-type: none"> <li>• communicates openly and honestly with others</li> <li>• inspires trust in others, and behaves fairly and ethically at all times</li> <li>• respects the confidentiality of client and Ministry information</li> <li>• demonstrates and applies an understanding of the Ministry's vision, purpose and values</li> <li>• adheres to the Ministry's Code of Conduct</li> <li>• models the highest standards of public service behaviour and probity</li> <li>• always acts to enhance the Ministry's reputation</li> </ul>	
Self Assessment:	
Manager's Comment:	Rating:

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

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

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

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

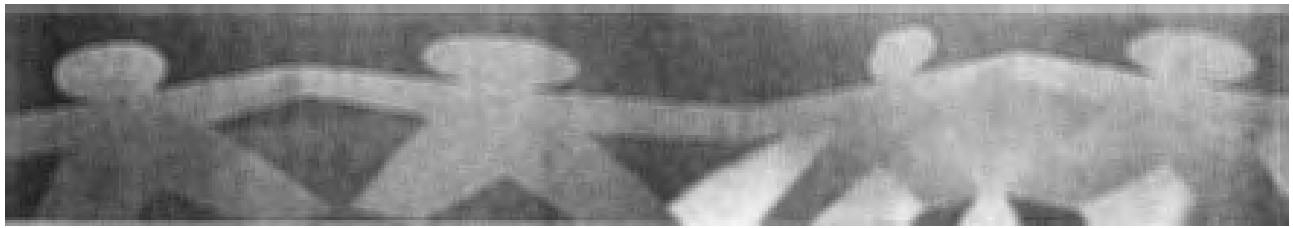
Identify and record the agreed development opportunities and assistance required to achieve your key deliverables, success factors and personal development. Agree with your manager: what action is to be taken, who is responsible, and when it will happen. Revisit this plan regularly with your manager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

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

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Attach coaching notes





**Performance Development and Assessment System**

<b>Staff Member's Name:</b>	
<b>Position:</b>	Employment Support Representative
<b>Manager's Name:</b>	

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

<b>Employees Comments:</b>

<b>Managers Comments:</b>

<b>Date Key Deliverables agreed:</b>	
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\_\_\_\_\_  
(Manager)

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

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

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

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

<b>Overall rating:</b>	
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**Key Deliverables** – refer page 8 of guidelines

**Ratings:**

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

**Employer Engagement:**

- Creates a positive first impression with employers
- Provide a high quality vacancy management service and appropriate follow up activities including:
  - monitoring referrals
  - contacting employers with open or on-hold vacancies within agreed timeframes to follow up on referrals made
  - follow up with employers about placements as appropriate
- Proactively promotes Work and Income products and services to employers
- Makes an appropriate contribution to Job Connect target of 80% of employers who have used Work and Income services in the previous three months would recommend our services to other employers.

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Vacancy and Client Outcomes:**

- Proactively engages with internal and external stakeholders to increase the number of filled vacancies sourced by Work and Income
- Contributes to Regional targets to increase the percentage of cancellations in to work
- Contributes to an increase in the number of clients using online and other self-serve services.
- Accurate screening and referral of clients to suitable employment opportunities contribute to clients' work readiness.
- Contributes to 80% of listed vacancies are filled.
- Works with Case Managers and Work Brokers to facilitate a smooth transition into work for clients
- Post-placement support activities are conducted within Employer Strategy timeframes.

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<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Timeliness:</b> <ul style="list-style-type: none"> <li>• Vacancy listings are available for referral and can be accessed by clients within 3 working hours of receipt of information e.g. RecruitMe</li> <li>• All suitable vacancies listed within 3 working hours of receipt of information.</li> <li>• Contact made with Employer/Work Broker within 24 hours of listing the vacancy</li> <li>• 80% of vacancies to have appropriate referrals within 48 hours of listing the role, with the remainder of vacancies with the initial referral list made no later than 5 working days.</li> <li>• A second shortlist to employers no later than 10 working days after the vacancy is listed, and 15 working days for the final shortlist, unless an employers requirements are stipulated otherwise.</li> <li>• 95% of ROIs are processed within 48 hours.</li> <li>• Employers/Work Brokers are contacted and updated on vacancy management progress within 5 working days from previous updates.</li> <li>• 80% of vacancies are managed end-to-end within 22 working days of listing.</li> <li>• Completes wage subsidy templates within regional timeframes.</li> </ul>	
<b>Self Assessment:</b>	
<b>Manager's Comment:</b>	<b>Rating:</b>
<b>Accuracy</b> <ul style="list-style-type: none"> <li>• Vacancy listings in Recruitme meet expected quality standards i.e. clear description of duties and requirements of the role, appropriate language and correct grammar.</li> <li>• Ensures that all information entered (UCVII, RecruitMe, SOLO, and SAT) is factually based and relevant.</li> <li>• A minimum of 90% of wage subsidy templates are completed accurately.</li> <li>• Maintain a minimum of 95% accuracy in all quality activities including:</li> </ul>	

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- Vacancy Administration Standards
- Call Assessments
- Job Connect Action Assessments (SWIFTT transactions)

**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).*

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**Self Assessment:**

**Manager's Comment:**

**Rating:**

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

**Ratings:**

<p><b>Needs Development</b></p> <p>Does not always or inconsistently demonstrates the behaviour when needed, or tries to demonstrate the behaviour but some aspects are missing.</p>	<p><b>Competent</b></p> <p>Demonstrates the appropriate behaviours.</p>	<p><b>Strength</b></p> <p>Always demonstrates the highest standards of behaviour across all situations and is a role model for others.</p>
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<p><b>People Skills</b>  <i>Demonstrates strong interpersonal skills.</i></p> <ul style="list-style-type: none"> <li>• is confident when working with clients and colleagues</li> <li>• treats all people with dignity and respect</li> <li>• demonstrates an understanding of the views, beliefs, cultural perspectives and individual differences in others</li> <li>• demonstrates the ability to work positively with others to achieve outcomes</li> <li>• stays calm, objective, and positive during difficult situations</li> <li>• demonstrates the ability to resolve conflicts.</li> </ul>	
<p><b>Self Assessment:</b></p>	
<p><b>Manager's Comment:</b></p>	<p><b>Rating:</b></p>

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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
- asks questions in detail, listens actively, and reserves judgment until all necessary information is extracted in order to understand the situation

**Self Assessment:****Manager's Comment:****Rating:****Partnerships and Relationship Management**

- seeks opportunities to collaborate and share information
- participates as a positive team member in all working relationships
- willingness to go the extra mile assisting others as necessary for the benefit of the wider team
- identifies, develops and uses both internal and external networks that add value or provide opportunities
- works in partnership with internal and external contacts where appropriate, in order to maximise services and avoid duplication
- has the respect of others and is a positive role model
- contributes towards a positive working and environment
- understanding the values, needs and aspirations of potential partners while successfully representing the Ministry.

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

**Maximising Knowledge and Application**

*Uses all resources available in order to deliver successful outcomes.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Being Accountable**

*Takes ownership for quality of work.*

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Public Service Integrity**

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

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

**Self Assessment:****Manager's Comment:****Rating:****Optionals:****Training and Facilitation**

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

- implements a structured planning framework that meets the training demands of the service centre/region
- uses an appropriate variety of delivery methods to effectively facilitate learning
- ensures staff or clients are given the opportunities and necessary support to learn, and apply their learning effectively
- applies an understanding of adult learning principles and adult learning styles
- evaluates whether the transfer of learning has occurred
- undertakes internal marketing of training opportunities where appropriate

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



**Marketing and Negotiation**

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

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

**Self Assessment:**

**Manager's Comment:**

**Rating:**

**Leading People**

*(applies only to people with staff management responsibilities)*

- provides leadership by creating a core sense of purpose and vision
- identifies difficult issues and opportunities and manages these proactively
- clearly communicates expectations and provides coaching and feedback on performance
- is aware of individuals' strengths and uses them as a basis for building capability
- encourages a challenging environment where people are motivated to do their best, while also considering work life balance
- leads and develops effective teams to maximise the contributions of members to achieve successful outcomes
- provides a healthy and safe work environment for their team(s) including completion of the health and safety scheduler tasks

**Self Assessment:**

**Manager's Comment:**

**Rating:**

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

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

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

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

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

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Attach coaching notes