



# SSPR

## Executive Success Strategy Performance Review

Name:		Position/Department:	Fiscal Year:
Planning Date:		Mid-year Review Date:	Year-End Review Date:
Section 1	Projects/ Goals		
Section 2	Executive Competencies		
Section 3	Overall Performance Ratings		
Section 4	Discussion on Talent Management Planning		
Ratings	<b>1</b> Unsatisfactory <b>2</b> Needs Improvement <b>3</b> Successful <b>4</b> Commendable <b>5</b> Outstanding		

**We want Austin to be the most livable city in the country.**  
**We want Austin to be recognized as the best managed city in the country.**

Instructions	
Executive Responsibilities	Appraiser Responsibilities
Review your proposed fiscal year goals and department initiatives to identify potential Projects/ Goals for the evaluation period.	Review your proposed fiscal year goals and department initiatives to identify potential Projects/ Goals for the evaluation period.
Section 1:  For the 3-5 most important project goals complete a project/goals page to include a brief description and at least one success measure. Complete the self-evaluation rating for the review period for each project/goal and for the overall rating using the 5 point scale in the space provided and be prepared to discuss progress and results at review meeting. Include on "Accomplishments" page any other accomplishments and/or operational successes and challenges you would like your Appraiser to be aware of.	Section 1:  Review and discuss the executive's progress and results on the identified projects/goals. Determine a rating for the review period for each project/goal using the 5 point scale in the space provided. Determine an overall rating for the projects/goals section and establish a development plan.
Section 2:  Review the 15 competencies and consider your ability to demonstrate each competency in your executive role. Complete the self-evaluation sections and be prepared to discuss strengths and areas you would like to develop with your appraiser in your performance review meeting.	Section 2:  Review and discuss the 15 executive competencies. Assess the executive's level of skill in exhibiting each competency. Determine the executives "Mastery" or "Needs Development" for each competency. Determine an overall rating on the executive's ability to demonstrate the collection of competencies using the 5-point scale and establish a development plan to address any needs.
Section 3:  Complete the self-evaluation section and be prepared to discuss the overall performance rating for the evaluation period.	Section 3:  After completing your ratings in sections 1 and 2, transfer your overall ratings for projects/goals and competencies to the Overall Performance Ratings page. Enter any final comments regarding the executive's overall performance during the evaluation period. . Include a summary of the executive's accomplishments for the review period.
Section 4:  Discuss the questions provided on Talent Management Planning.	Section 4:  Discuss the questions provided on Talent Management Planning.



# SSPR

## Executive Success Strategy Section 1: Project/ Goals

For planning, review and discuss fiscal year department goals and initiatives to identify potential projects for the evaluation period. For the evaluation period, complete a page for each project goal to include a brief description and at least one success measure. The Appraiser will complete the "Appraiser Evaluation" part of this section by determining a rating based on the executive's ability to demonstrate progress on the identified project/goal and comment on results, progress and next steps. The Executive completes the "Self-Evaluation" part of this section.

### Project /Goal #1:

Description:

Measure(s):

#### Mid-Year Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**

#### Year-End Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**



# SSPR

## Executive Success Strategy Section 1: Project/ Goals

For planning, review and discuss fiscal year department goals and initiatives to identify potential projects for the evaluation period. For the evaluation period, complete a page for each project goal to include a brief description and at least one success measure. The Appraiser will complete the "Appraiser Evaluation" part of this section by determining a rating based on the executive's ability to demonstrate progress on the identified project/goal and comment on results, progress and next steps. The Executive completes the "Self-Evaluation" part of this section.

### Project /Goal #2:

Description:

Measure(s):

#### Mid-Year Project/Goal Rating

##### Executive Self-Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

##### Appraiser Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

**Appraiser Comments:**

#### Year-End Project/Goal Rating

##### Executive Self-Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

##### Appraiser Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

**Appraiser Comments:**



# SSPR

## Executive Success Strategy Section 1: Project/ Goals

For planning, review and discuss fiscal year department goals and initiatives to identify potential projects for the evaluation period. For the evaluation period, complete a page for each project goal to include a brief description and at least one success measure. The Appraiser will complete the "Appraiser Evaluation" part of this section by determining a rating based on the executive's ability to demonstrate progress on the identified project/goal and comment on results, progress and next steps. The Executive completes the "Self-Evaluation" part of this section.

### Project /Goal #3:

Description:

Measure(s):

#### Mid-Year Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

Appraiser Comments:

#### Year-End Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

Appraiser Comments:



# SSPR

## Executive Success Strategy Section 1: Project/ Goals

For planning, review and discuss fiscal year department goals and initiatives to identify potential projects for the evaluation period. For the evaluation period, complete a page for each project goal to include a brief description and at least one success measure. The Appraiser will complete the "Appraiser Evaluation" part of this section by determining a rating based on the executive's ability to demonstrate progress on the identified project/goal and comment on results, progress and next steps. The Executive completes the "Self-Evaluation" part of this section.

### Project /Goal #4:

Description:

Measure(s):

#### Mid-Year Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**

#### Year-End Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**



# SSPR

## Executive Success Strategy Section 1: Project/ Goals

For planning, review and discuss fiscal year department goals and initiatives to identify potential projects for the evaluation period. For the evaluation period, complete a page for each project goal to include a brief description and at least one success measure. The Appraiser will complete the "Appraiser Evaluation" part of this section by determining a rating based on the executive's ability to demonstrate progress on the identified project/goal and comment on results, progress and next steps. The Executive completes the "Self-Evaluation" part of this section.

### Project /Goal #5:

Description:

Measure(s):

#### Mid-Year Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**

#### Year-End Project/Goal Rating

##### Executive Self-Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

##### Appraiser Evaluation

1 Unsatisfactory	2 Needs Improvement	3 Successful	4 Commendable	5 Outstanding
------------------	---------------------	--------------	---------------	---------------

**Appraiser Comments:**



# SSPR

## Executive Success Strategy Section 1: Accomplishments

Executives should include any additional accomplishments, operational successes, or challenges for the review period on this page.

### Mid-Year Overall Performance Summary of Accomplishments

**Summary of Accomplishments:**

### Year-end Overall Performance Summary of Accomplishments

**Summary of Accomplishments:**



# SSPR

## Executive Success Strategy Section 1: Projects/Goals

Determine an overall rating based on the executive's progress on all identified Projects/Goals. Include a summary of the executive's project/goal accomplishments for the review period and establish a development plan to address any development needs.

### Mid-Year Overall Projects/Goals Rating

#### Executive Self-Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

#### Appraiser Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

**Summary of Accomplishments:**

**Development Plan:**

### Year-End Overall Projects/Goals Rating

#### Executive Self-Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

#### Appraiser Evaluation

<b>1</b> Unsatisfactory	<b>2</b> Needs Improvement	<b>3</b> Successful	<b>4</b> Commendable	<b>5</b> Outstanding
-------------------------	----------------------------	---------------------	----------------------	----------------------

**Summary of Accomplishments:**

**Development Plan:**





# SSPR

## Executive Success Strategy Section 2: Executive Competencies

Review and discuss the 15 Executive competencies listed below. The Appraiser will complete the “Appraiser Evaluation” part of this section by placing a check mark in either the “Competent” or “Development Needed” column; “Comments” can be added to emphasize the executive’s ability to master the competency or areas that need more development. The Executive should complete the “Self-Evaluation” part of this section.

### MID-YEAR OVERALL COMPETENCY DEVELOPMENT NEEDS

<u>Executive Competencies</u>	Self-Evaluation		Appraiser Evaluation		Comments
	Competent	Dev Needed	Competent	Dev Needed	
<u>Achieve Results</u>					
<u>Boundaryless Perspective</u>					
<u>Conflict Management</u>					
<u>Cultural Competence</u>					
<u>Customer Service</u>					
<u>Decision Making</u>					
<u>Dependable &amp; Trustworthy</u>					
<u>Effective Communication</u>					
<u>Employee Development</u>					
<u>Leadership</u>					
<u>Purpose &amp; Vision</u>					
<u>Planning Priorities</u>					
<u>Politically Savvy</u>					
<u>Problem Solving</u>					
<u>Strategic Thinking</u>					

### Mid-Year Overall Competency Rating

Determine a Mid-Year overall rating based on the executive’s ability to demonstrate the collection of competencies. Establish a development plan to address any development needs.

#### Executive Self-Evaluation

**1** Unsatisfactory      **2** Needs Improvement      **3** Successful      **4** Commendable      **5** Outstanding

#### Appraiser Evaluation

**1** Unsatisfactory      **2** Needs Improvement      **3** Successful      **4** Commendable      **5** Outstanding

#### Development Plan:



# SSPR

## Executive Success Strategy Section 2: Executive Competencies

Review and discuss the 15 Executive competencies listed below. The Appraiser will complete the “Appraiser Evaluation” part of this section by placing a check mark in either the “Competent” or “Development Needed” column; “Comments” can be added to emphasize the executive’s ability to master the competency or areas that need more development. The Executive should complete the “Self-Evaluation” part of this section.

### YEAR-END OVERALL COMPETENCY DEVELOPMENT NEEDS

<u>Executive Competencies</u>	Self-Evaluation		Appraiser Evaluation		Comments
	Competent	Dev Needed	Competent	Dev Needed	
<u>Achieve Results</u>					
<u>Boundaryless Perspective</u>					
<u>Conflict Management</u>					
<u>Cultural Competence</u>					
<u>Customer Service</u>					
<u>Decision Making</u>					
<u>Dependable &amp; Trustworthy</u>					
<u>Effective Communication</u>					
<u>Employee Development</u>					
<u>Leadership</u>					
<u>Purpose &amp; Vision</u>					
<u>Planning Priorities</u>					
<u>Politically Savvy</u>					
<u>Problem Solving</u>					
<u>Strategic Thinking</u>					

### Year-End Overall Competency Rating

Determine a Year-End overall rating based on the executive’s ability to demonstrate the collection of competencies. Establish a development plan to address any development needs.

#### Executive Self-Evaluation

**1** Unsatisfactory      **2** Needs Improvement      **3** Successful      **4** Commendable      **5** Outstanding

#### Appraiser Evaluation

**1** Unsatisfactory      **2** Needs Improvement      **3** Successful      **4** Commendable      **5** Outstanding

#### Development Plan:



# SSPR

## Executive Success Strategy Section 3: Overall Performance Ratings

The Appraiser add the Overall Project/Goal rating to the Overall Competency rating and divide by 2 to determine the Executive's Performance Rating; include Comments on rating. The Executive complete the "Self-Evaluation".

### Mid-Year Overall Performance Rating

	Mid-Year Project/Goals Rating	+	Mid-Year Competencies Rating	÷ 2	=	Mid-Year Overall Performance Rating
Executive Self-Evaluation		+		÷ 2	=	
Appraiser Evaluation		+		÷ 2	=	
<b>Unsatisfactory</b> (1 – 1.5)	<b>Needs Improvement</b> (2 – 2.5)		<b>Successful</b> (3 – 3.5)			<b>Commendable</b> (4 – 4.5)
						<b>Outstanding</b> ( 5 )

Comments:

Appraiser signature/date:

Executive signature/date:

### Year-End Overall Performance Rating

	Year-End Project/Goals Rating	+	Year-End Competencies Rating	÷ 2	=	Year-End Overall Performance Rating
Executive Self-Evaluation		+		÷ 2	=	
Appraiser Evaluation		+		÷ 2	=	
<b>Unsatisfactory</b> (1 – 1.5)	<b>Needs Improvement</b> (2 – 2.5)		<b>Successful</b> (3 – 3.5)			<b>Commendable</b> (4 – 4.5)
						<b>Outstanding</b> ( 5 )

Comments:

Appraiser signature/date:

Executive signature/date:



Talent Management is an ongoing analysis and planning effort that ensures there is continuity in the organization when positions become vacant. This page is a *discussion guide* to begin having talent management discussions by identifying critical roles and positions in departments and discussing ways to ensure the organization has sufficient “bench strength” to ensure continuity of service delivery.

Place a check next to each main question discussed:

- 1. Do you have the talent in place now needed to achieve your identified business goals?
  - What are you doing to develop the talent needed to achieve your goals?
  
- 2. What are the most critical roles in your department?
  - What are you doing to develop bench strength for those roles?
  
- 3. Who are your critical performers?
  - What are you doing to capture or retain the knowledge they have?
  - Who are their designated back ups?
  - How is bench strength being developed to step in when needed?

Discussion Notes –