"Key Career Competencies and Strategies to Develop Them" -- webinar

2:00 – 3:30 p.m. PT, Thursday, April 15, 2010

Cal-ICMA and CSMFO Coaching Programs have cosponsored this webinar for all employees.

*** Advance registration required for this no-charge webinar: https://www1.gotomeeting.com/register/864393248

Panel Topics:
1. What key competencies are required for success in local government?
2. What strategies and resources are effective to develop them?
3. How are agencies integrating key competencies into the development, evaluation, and advancement of talent?
4. How are these efforts making a difference for employees, the organization, and the community served?
5. What do you need to advance in your career?
6. What does it take to be attractive for mid-level and senior-level opportunities?

Panelists:
- Bill Chiat, Program Director, CSAC Institute for Excellence in County Government
- Kristi Hobrecker, HR Analyst, Santa Clarita
- Teri Black-Brann, Executive Recruiter, Teri Black & Company

Target audience: all employees who are seeking to develop their careers in local government.

CSMFO members who are CPAs are eligible to receive CPE credit for participating in this live webinar.

1. Register in advance for the webinar:
   There is no charge for participating in the webinars, but each requires advance registration.
   *** Advance registration required for this no-charge webinar.

2. Pick your audio option:
   a. dial (646) 519-5883 [callers’ PIN 7592#] to participate. (Dialing in enables you to ask questions verbally during the webinar discussions. If you dial in, please do not put the call on hold, especially if you have music or a message that plays and will disrupt other callers.) You will pay whatever your regular telephone carrier charges are for this call. OR
b. access live audio via the web [powered by Granicus]--As an alternative to the dial-in number, you can now listen to live audio at the "Live Audio and Archives" tab of www.cal-icma.org/coaching or www.csmfo.org/coaching.

3. Ask questions:
If you prefer, you may submit questions anonymously via email to cal-icma@donmaruska.com either in advance or via the webinar during the panel discussion. As moderator for the session, Don Maruska will pose the emailed questions. After a panel conference call occurs, a digital recording will be available at the "Live Audio & Archives" tab of www.cal-icma.org/coaching and www.csmfo.org/coaching.

Post-Webinar Group Discussions

Many agencies are organizing groups to listen to the calls (live or recorded) and discuss the topics among themselves after the calls. Some are summarizing their discussions and distributing them to managers throughout their organizations. Use the Cal-ICMA and CSMFO Coaching Programs as effective ways to enhance professional development in your agency. Here are some discussion starters for this session.

1. What are key competencies for success in our organization?
2. Which ones need particular attention?
3. How can we tap internal and external resources to help employees develop them?
4. How are our efforts making a difference in employees’ careers, our organization, and service to our community?

MORE RESOURCES--See the "Coaching Corner" at www.cal-icma.org/coaching or www.csmfo.org/coaching for valuable resources to boost your career.

Enjoy the resources and support to thrive in local government.

Don Maruska, Master Certified Coach
Director, Cal-ICMA and CSMFO Coaching Programs
See "Coaching Corner" at www.cal-icma.org/coaching and www.csmfo.org/coaching
Key Career Competencies and Strategies to Develop Them

Coaching Programs
April 15, 2010
Coaching Program: 12th year as member benefit
Career Development Committee

Coaching Program: 7th year
Preparing the Next Generation Committee

CA City Mgmt. Foundation
CPS Human Resources
Int’l City/County Mgmt. Assn.
Bob Murray & Associates
County Administrative Officers Assn.
Pacific Gas and Electric Company
Granicus
Personnel & Employee Relts. Dept.

CA Communities Joint Powers Authority
Municipal Mgmt. Assn. of S. CA
Municipal Mgmt. Assn. of N. CA
Public Agency Retirement Services
California Redevelopment Assn.
Piper Jaffray
Keenan & Associates
Common Sense California
Overview of Session

- **Key Competencies and Resources for Local Government**
  
  *Bill Chiat*, Program Director, CSAC Inst. For Excellence in County Gov’t

- **Integrating Development, Evaluation, and Advancement**
  
  *Kristi Hobrecker*, HR Analyst, Santa Clarita

- **Moving Up in a Down Economy**
  
  *Teri Black-Brann*, Executive Recruiter, Teri Black & Company

*Don Maruska*, Master Certified Coach, Moderator

…and polls and questions along the way.
Competencies in Public Service

Extraordinary People Serving Extraordinary Public Agencies
Framework for the Public Leader’s Role

Public Value
Authority
Capacity
Leadership Competencies

- Personal Literacy
- Relationship Dexterity
- Advocacy
- Strategic Agility
Knowledge Competencies

Governance

Policy

Administration

Stewardship
Personal Literacy

- Trustworthiness
- Self Knowledge
  - Leverage strengths; work on weaknesses; know hot buttons
- Realistic Optimism
- Fairness and Compassion
Relationship Dexterity

- Build Coalitions
  - Collaborated with others to get work done
- Facilitate Dialogue
- Value Differences
- Manage Conflict
Strategic Agility

- Adaptive Change
  - Comfort with ambiguity; with not knowing the answer
- Strategic Thinking
- Political Management
- Shared Vision
Public Service Advocacy

- **Public Value**
  - Know what good you want to accomplish

- **Community Service**

- **Community Needs**

- **Public and Media Relations**
Governance

- Intergovernmental Relations
- Role and Powers
  - Recognize you have choices in the role you play
- Resource Allocation
- Decision Making
Policy

- **Creation**
  - Establish and seek agreement to guiding principles

- **Implementation**

- **Review**
  - Social and Human Services
  - Public Safety
  - Land Use
  - Environmental Protection
  - Infrastructure
Administration

- Employee Relations
- Performance Assessment
  - Create measurements; indicators of progress
- Accountability
- Trustworthiness
Resource Stewardship

- Financial and Human Resources
  - Invest in the greatest percent of budget
- Meeting Management
- Resource Allocation
- Crisis Management
The Art of Building Capacity

- Get on the balcony
  - Take a look at what’s happening around you
- Use partners, coaches, models
  - Recognize what will work for you
- Seek feedback and value those who provide it
- Commit to continued learning
- Seek challenges
- Practice
The *Art* of Building Capacity

- Professional Associations/Networking
  - Position and subject
- Read a book ... any book
- Transfer knowledge from the Unexpected
- Advanced ‘immersion’ programs
  - MPA, Leadership Program
- CSAC Institute or similar resource
A FOUNDATION OF LEADERSHIP

The leadership and knowledge competencies of effective County officials

LEADERSHIP COMPETENCIES

Personal Literacy
- Trustworthiness
- Respect
- Responsibility
- Fairness
- Compassion

Strategy
- Strategic planning
- Adaptive change
- Shared vision

KNOWLEDGE COMPETENCIES

Governance
- State and local relations
- County role and powers
- Finances
- Decision-making

Policy
- Social and human services
- Public safety
- Land use
- Environmental protection

Health Care and California Counties
A Four-Course Series on Understanding County Health Care Obligations and Financial Resources

Low Cost * Professional Development for California Counties

2010 WINTER/SPRING COURSE SCHEDULE

JANUARY

381 Creative Budget Solutions and Innovative Service Redesign
Given mandated services, citizen expectations and the scope of the current economic meltdown, counties across California cannot simply cut their way out of their deep budget challenge. This interactive course will explore the paradoxes and dilemmas of typical budget cutbacks, a menu of creative budget solutions, practical tools for departments, and leadership approaches. Two case studies from San Mateo County will be used to identify innovative approaches and lessons learned. Course participants will also contribute case examples of service redesign as well as effective tools.

Thursday, 14 January 2010  10:00-3:30
Sacramento: $75/person for counties + 3 credits = Board/Execs

151 Financing California Counties
Have you found yourself overwhelmed trying to understand the financial reports from county programs? Or worse yet, trying to explain county finances and revenues to your constituents? This course provides an in-depth examination of the federal, state and local county funding sources and how those funds are typically spent. The class explores county discretionary levels with key funding sources and how the funds may be spent. Participants discuss various methods to communicate the challenges of county finances to the community.

Friday, 26 February 2010  10:00-3:30
Oakland: $75/person for counties + 3 credits = Board/Execs
ICMA Coaching Program
Key Career Competencies

Kristi Hobrecker, Human Resources Analyst
City of Santa Clarita
About Santa Clarita

- 177,000 residents & 6,000 businesses
- 365 regular; 225 temp/seasonal
- Lean, flat organization
- History of no layoffs
- High customer service expectation
- Soft hiring freeze began in 2008
- 8% of positions now frozen
Develop a comprehensive training plan

Develop programs to enhance employee retention and build advancement potential

Evaluate and update how we measure performance
Competency Plan

The goals are:

To provide developmental opportunities

To create and retain a talented workforce

To develop future leaders

To help employees succeed
Competency: The knowledge, skills, abilities, and behaviors that work together to produce outstanding job performance

Core Competencies
Technical/Functional Competencies
Leadership Competencies
Core Competencies

- Communication Skills
- Customer Service
- Decision making and problem solving
- Fiscal management
- Interpersonal skills
- Organizational awareness
- Organizational skills
- Project management
Classification

Recruitment & Selection

Performance Mgmt

Training & Development

Succession Planning
Integrating Competencies: A Closer Look

- Advancing Talent
- Evaluating Talent
- Developing Talent
1. Developing Talent

- Supervisor Series
- Professional Support
- General Training
**General Training**

I'm pleased that the City goes to this kind of an extent to train staff. It's another example of the City recognizing the value of its employees.

**Professional Support Series**

The series has already made an impact on employees and our organization. One coworker mentioned to me that this training would have been beneficial when she was hired and another found the information so helpful that she provided the same training to her division’s staff! This series meets a training need that is long overdue and I am grateful that the City recognizes the value of support staff’s role and is willing to commit the time and effort into training.
**Supervisor Series**

*The sessions were refreshing, inspiring, and motivating.*

*I believe that as a result of the program, I am a better manager and City employee.*

*Going through a series of classes with peer interaction was a good experience. I enjoyed and learned from listening to the "real life" stories from my fellow supervisors in the organization.*
Mentoring Program

Participating offered me a great opportunity to interact with a mentor who has extensive knowledge and work experience. The Mentor/Protégé relationship will ultimately provide me with growth and development opportunities.

Job Shadowing Program

Shadowing gives you insight into other people's jobs and how other areas are run. You get to meet people with whom you would likely not otherwise interact with. It helped increase my understanding of the organization and how everyone's job contributes to the success of the City.
2. Evaluating Talent

Performance Evaluations

What do we evaluate?

✓ Job performance
✓ Core competencies
✓ Technical competencies
✓ Performance goals
✓ Development areas
✓ Overall evaluation
✓ Leadership competencies (if applicable)
**SECTION 2—CORE COMPETENCIES**

The core competencies identified for the position’s job family are listed below. Consider how the employee performed the core competencies during the evaluation period. Note specific examples of the observed performance in the Comments/Examples field.

<table>
<thead>
<tr>
<th>1) COMMUNICATION SKILLS</th>
<th>4</th>
<th>3</th>
<th>2</th>
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<tbody>
<tr>
<td>Communicates effectively in person with individuals</td>
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<td></td>
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<tr>
<td>Communicates effectively in person with groups</td>
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<tr>
<td>Communicates effectively in writing (uses proper grammar and City’ standards)</td>
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<td>Shares ideas, information, and feelings in a constructive and positive manner</td>
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<tr>
<td>Listens to and objectively considers ideas and suggestions from others</td>
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<tr>
<td>Asks questions for clarification or direction</td>
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<tr>
<td>Shares relevant information openly, honestly, and in a timely fashion</td>
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<tr>
<td>Uses appropriate communication methods</td>
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</table>

*Comments/Examples:*

<table>
<thead>
<tr>
<th>2) CUSTOMER SERVICE (internal and external customers)</th>
<th>4</th>
<th>3</th>
<th>2</th>
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<tbody>
<tr>
<td>Quickly and effectively addresses customer problems</td>
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</table>
SECTION 3—TECHNICAL COMPETENCIES

In the space below, identify key technical competencies required to perform the position’s essential functions. Rate the employee’s overall performance as demonstrated during the evaluation period and describe examples of observed performance. Examples of technical competencies may be found in the “Essential Functions” or “Knowledge, Abilities and Skills” section of the position’s job description.

Describe Performance:

OVERALL RATING FOR TECHNICAL COMPETENCIES

4 3 2 1
□ □ □ □
SECTION 6—LEADERSHIP COMPETENCIES

The Leadership Competency rating sheet should be completed (and attached to the regular evaluation) for employees who have official supervisory or managerial responsibilities as noted in their job description. As with the other competencies, rate the employee’s performance level as demonstrated during the evaluation period and include specific examples of observed performance.


<table>
<thead>
<tr>
<th>1) LEADS</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
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<tbody>
<tr>
<td>Leads by Example (sets high professional standards)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Leads Others (provides purpose and direction, sense of excitement)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Manages Conflict (resolves conflict in a prompt, positive manner)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>Communicates (clearly, concisely &amp; timely; listens; keeps others informed)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
</tbody>
</table>

Comments/Examples:

<table>
<thead>
<tr>
<th>2) DEVELOPS</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
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</thead>
<tbody>
<tr>
<td>Prepares Self (recognizes strengths &amp; weaknesses, strives to expand knowledge)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
</tr>
<tr>
<td>Develops Others (coaches, counsels &amp; mentors)</td>
<td>□</td>
<td>□</td>
<td>□</td>
<td>□</td>
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<tr>
<td>Motivates (encourages &amp; rewards employee achievements)</td>
<td>□</td>
<td>□</td>
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Performance Evaluations

I like that the new evaluation is built around the competencies specific to each position. It’s helpful to have each competency broken down into detailed lists so I have an easier job explaining the areas where the employee is excelling and where they need work. I also like where you can reference the previous year's Development Areas. This helps establish progress and continuity.
3. Advancing Talent

Interim Opportunities

Leadership Academy
Leadership Academy
Leads, Develops, Achieves

18-Month Program

Executive Team instructors

Competency-driven curriculum

Assessments and projects

Peer discussion and homework
<table>
<thead>
<tr>
<th>LEADS</th>
<th>Leads by Example</th>
<th>Leads Others</th>
<th>Manages Conflict</th>
<th>Communicates</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>* Exemplifies strong character and integrity</td>
<td>* Provides purpose and direction toward achieving City goals</td>
<td>* Resolves conflict in a positive and constructive manner</td>
<td>* Communicates clearly and convincingly</td>
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<td></td>
<td>* Exhibits loyalty to the City and staff</td>
<td>* Creates a sense of excitement</td>
<td>* Addresses performance problems and issues promptly</td>
<td>* Makes clear and convincing presentations</td>
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<tr>
<td></td>
<td>* Self and the public set high standards for self and hold self accountable</td>
<td>* Stresses for wise solutions</td>
<td>* Listens and openly considers ideas and suggestions</td>
<td>* Keeps others informed</td>
</tr>
<tr>
<td>DEVELOPS</td>
<td>Prepares Self</td>
<td>Develops Others</td>
<td>Motivates</td>
<td>Team Builds</td>
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<tr>
<td></td>
<td>* Recognizes own strengths and weaknesses</td>
<td>* Supports professional and personal growth</td>
<td>* Improves and motivates others toward goals</td>
<td>* Encourages and facilitates cooperation and trust among team members</td>
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<td></td>
<td>* Extracts learning from failure</td>
<td>* Helps people learn</td>
<td>* Encourages initiative</td>
<td>* Nurtures a collaborative and team spirit</td>
</tr>
<tr>
<td></td>
<td>* Continually strives to expand knowledge</td>
<td>* Coaches, counsels, and mentors</td>
<td>* Encourages people for their efforts and achievements</td>
<td>* Manages an inclusive workplace that maximizes the value of each person</td>
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<tr>
<td></td>
<td>Understands the importance of the process which led the Council and the importance of public service, and is committed to advancing the well-being of the community</td>
<td></td>
<td>* Ensures people are treated fairly</td>
<td></td>
</tr>
<tr>
<td>ACHIEVES</td>
<td>Creates a Vision</td>
<td>Encourages Creativity</td>
<td>Makes Decisions</td>
<td>Gets Results</td>
</tr>
<tr>
<td></td>
<td>* Creates effective strategies consistent with City policies, practices, and philosophy</td>
<td>* Creates a work environment that encourages creative thinking</td>
<td>* Accepts change and adjusts behavior and work processes</td>
<td>* Translates ideas into concrete actions</td>
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<td></td>
<td>* Builds a shared vision with clear goals and expectations</td>
<td>* Identifies innovative and non-traditional solutions</td>
<td>* Encourages decision making on the front lines</td>
<td>* Accomplishes tasks competently</td>
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<td></td>
<td></td>
<td>* Designs and implements innovative processes and programs</td>
<td>* Looks for decisions that will endure the test of time and future generations</td>
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<td></td>
<td></td>
<td></td>
<td>* Makes decisions in difficult and ambiguous situations when time is critical</td>
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</table>
Leadership Academy

The Academy has really energized me and motivated me to continue learning and educating myself to become a better leader. The program material, discussions and feedback have been effective and practical for everyday use and I really gained a lot from the discussions with our Executive Team instructors and my peers.

The fact that the courses were led by City staff, who knows how we do things, made the program extremely valuable.

I think this is an amazing program, considering that right now, municipalities are scrambling to provide services and prevent lay-offs. To have such a high-level program offered at this time is simply amazing!
Benefits of Our Approach

Knowledge of Career Paths/Expectations

Opportunities to Gain New Skills

Opportunities to Learn About the City

Sense of Employee Value

Reinforces the City’s Values

Positions City & Employees for Future

Greater Efficiency and Service Quality
Advancing in a Tough Economy

Cal ICMA/CSMFO

Key Career Competencies

Webinar ♦ April 15, 2010
State of Organizations Today

- Reorganizations
- Downsizing
- Early Retirement Incentives
- Layoffs
- Media & Public Sentiment
What is the Result?

- Uncertainty
- Cynicism and loss of hope
- Heavier and greater demands
- Stress
- Frustrated policy makers
- Opportunity
Yesterday’s Criteria for Advancement

- Sufficient tenure
- Technical expertise
- Depth in one area/one discipline
- Long-term service in one organization
Teri’s Top 10 List for Advancing

#1) Initiative, Attitude & Optimism
#2) Critical Thinking Abilities
#3) Communication & Interpersonal Skills
#4) Appreciation/Familiarity with Technology
#5) Love for Data – especially performance related
Teri’s Top 10 (cont.)

#6) Political Acumen
#7) Community Orientation
#8) Integrity and Reputation Management
#9) Versatility and Adaptability
#10) Track Record for Getting Things Done
Getting Over the Obstacles

• Step up before you are asked
• Present your plan/provide options
• Support not there › create it or go find it
• Take reasonable risks
• Act with a sense of urgency
Upcoming sessions

Establishing Sound Fiscal Policies
CSMFO webinar
2:00 – 3:30 p.m., PT, Wednesday, May 5

Marrying the Best of Multiple Generations
Cal-ICMA telephone panel
2:00 – 3:00 p.m., PT, Thursday, May 20
Resources and Feedback

Go to “Live Audio & Archives” tab at web sites for recordings of this webinar and other professional development resources.

www.cal-icma.org/coaching
www.csmfo.org/coaching

Please complete the follow up survey.
Contacts for Today’s Session

- **Bill Chiat**, Program Director, CSAC Inst. For Excellence  
  BChiat@counties.org

- **Kristi Hobrecker**, HR Analyst, Santa Clarita  
  KHobrecker@santa-clarita.com

- **Teri Black-Brann**, Executive Recruiter, Teri Black & Company  
  Teri@tbrecruiting.com

- **Don Maruska**, Director, Cal-ICMA & CSMFO Coaching  
  Don@DonMaruska.com
BIOGRAPHY

William S. (Bill) Chiat  
CSAC Institute Manager

William Chiat (pronounced shy-at) is the Program Manager of the CSAC Institute for Excellence in County Government. Bill has a unique combination of knowledge, skills, abilities ... and enthusiasm. He incorporates over 30 years of practical executive leadership experience in state and local governments into organizational management and employee development, mixed with a fluency in governance issues and the challenges of managing today’s workforce.

Bill brings extensive practioneer experience to the Institute as an executive in local and state government. At the county level Bill served as County Executive Officer of Napa County and Director of Organizational Effectiveness in Santa Barbara County. He has worked in city government as assistant to the city manager (and Organizational Development Coach) of Oxnard and in special districts as a Planning and Development Director. At the state level, Bill served as the Executive Director of the Arizona Governor’s Office for Excellence in Government and led the state executive education program, among other responsibilities.

In addition to his work with CSAC Institute Bill also currently serves as the Executive Director of the California Association of Local Agency Formation Commission.

For over 25 years Bill has championed and innovated in the professional development of executives in state and local government. He has established and managed accredited learning programs in state, county and city governments. He has taught, facilitated and written about competencies and practices in governance and agency leadership and organizational development.

Bill has a Bachelor of Science from the University of Minnesota and a Masters of Science in natural resources administration from the University of Michigan. He is a graduate of the Senior Executives in State and Local Government program, and the Leadership in the 21st Century program, both from the Kennedy School of Government at Harvard University.
Kristi is currently a Human Resources Analyst for the City of Santa Clarita. She holds a Bachelor of Arts in Political Science and a Master of Public Policy from Pepperdine University.

Kristi has served in a variety of capacities while at the City. In addition to managing the City’s recruitment process for the last six years, her current responsibilities focus on training and development. Kristi manages and develops the 18-month curriculum for the Leadership Academy program designed for current and emerging leaders. Courses include *Leading with Emotional Intelligence*, *Encouraging Creativity*, *The Visionary Process*, and *Leading from the Middle*. She is also responsible for developing and presenting a wide variety of competency-based training programs for employees. Some of these trainings include *Career Development Workshops*, *Successful Interviewing Strategies*, *Understanding Your Role in the Hiring Process*, and *Becoming an Emotionally Intelligent Supervisor*. Kristi also enjoys coordinating the City’s Job Shadowing Program designed to increase organizational awareness amongst employees.

Kristi meets with employees to prepare them for advancement opportunities through one-on-one coaching. She also participates in the City’s Mentoring Program as both a protégé and mentor and routinely conducts interview coaching sessions for members of the community through the City’s WorkSource Center.

Kristi lives in Santa Clarita with her husband Chris, and their two daughters, Callia and Cayden.
Teri Black-Brann, President
Teri Black & Company

Teri has been dedicated to public sector executive search since 1999. Serving communities with populations over 1 million to towns as small as 2,000, she has built a substantial base of clients across the Western United States that continually rely upon her personalized service and recruitment expertise. Her clients also include special districts, utility agencies and non-profit organizations.

Before entering the executive search field, Teri enjoyed a successful career in local and federal government, serving in management positions where she oversaw public safety, finance, human resources, communications, public/legislative affairs, information technology and strategic planning. In the prior Presidential Administration, Teri served as Chief of Staff in the U.S. Department of Justice COPS Office where she managed a $2 billion annual budget and a staff of over 200.

Teri earned her Master's in Public Administration from the University of Southern California and holds a Bachelor's degree in Criminal Justice from California State University, Fullerton. She is a founding committee member of Cal-ICMA's Preparing the Next Generation initiative and holds active professional association memberships in ICMA, CSMFO, IACP, PERF, NACOLE, APA, and APWA, among others.
A FOUNDATION OF LEADERSHIP

The leadership and knowledge competencies of effective County officials

<table>
<thead>
<tr>
<th>LEADERSHIP COMPETENCIES</th>
<th>KNOWLEDGE COMPETENCIES</th>
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<tbody>
<tr>
<td><strong>Personal Literacy</strong></td>
<td><strong>Governance</strong></td>
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<td>Trustworthiness</td>
<td>State and local relations</td>
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<td>Respect</td>
<td>County role and powers</td>
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<td>Responsibility</td>
<td>Finances</td>
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<td>Fairness</td>
<td>Decision-making</td>
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<td>Compassion</td>
<td>Policy</td>
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<td>Social and human services</td>
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<td><strong>Strategy</strong></td>
<td>Public safety</td>
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<td>Strategic planning</td>
<td>Land use</td>
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<td>Adaptive change</td>
<td>Environmental protection</td>
</tr>
<tr>
<td>Shared vision</td>
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<tr>
<td>Appreciate possibilities</td>
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<tr>
<td>Future generations</td>
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<tr>
<td><strong>Relationship Dexterity</strong></td>
<td><strong>Administration</strong></td>
</tr>
<tr>
<td>Coalition building</td>
<td>Personnel and employee relations</td>
</tr>
<tr>
<td>Facilitate dialogue</td>
<td>Performance assessment</td>
</tr>
<tr>
<td>Appreciate differences</td>
<td>Customer service</td>
</tr>
<tr>
<td>Manage Conflict</td>
<td>Accountability</td>
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<tr>
<td><strong>Advocacy</strong></td>
<td><strong>Stewardship</strong></td>
</tr>
<tr>
<td>Service to community</td>
<td>Financial and human resources</td>
</tr>
<tr>
<td>Value of county</td>
<td>Meeting management</td>
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<tr>
<td>Community needs</td>
<td>Communication</td>
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<td></td>
<td>Media relations</td>
</tr>
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<td></td>
<td>Crisis management</td>
</tr>
</tbody>
</table>

LEARN . GROW . ACHIEVE

www.csacinstitution.org
address transparency in decision-making, coalition building, collaboration, and setting expectations.

**151 Financing California Counties**

Have you found yourself overwhelmed trying to understand the financial reports from county programs? Or worse yet, trying to explain county finances and revenues to your constituents? This course provides an in-depth examination of the federal, state and local county funding sources and how those funds are typically spent. The class explores county discretionary levels with key funding sources and how the funds may be spent. Participants discuss various methods to communicate the challenges of county finances to the community.

Friday, 26 February 2010  10:00–3:30
Oakland  $75/person for counties  3 credits  Board/Execs

**FEBRUARY**

**311 Water in California – The Politics, Distribution ... and the Future**

California has a long history of water politics. This course provides an overview of that history and puts it in the context of the current water debate. It provides the policy overview, history and proposals to this complex issue in an interactive and practical manner. Participants explore the current status of water including water storage and delivery systems in the state. The class examines pressures on the water system outside of drought and growth, including climate change and environmental regulation. Discussion identifies the proposals under discussion for dealing with the current water crisis and how they could affect water available for counties.

Thursday, 4 February 2010  10:00–3:30
Sacramento  $75/person for counties  3 credits  Board/Execs

**112 Getting Things Done: The Art of Working with Others to Achieve Objectives**

To get things done you work with a range of county staff, elected officials and community members. What techniques and tools exist to help you pursue your objectives? This course examines practices that improve the likelihood of achieving desired objectives. It examines the elements which contribute to success, from interpersonal relations to building a system of monitoring and a culture of accountability. Participants look at themselves and the values that underlie ethical behavior and trustworthiness. Other components

To register for classes please visit:  [www.csacinstitute.org](http://www.csacinstitute.org)
into an overall strategy package. Participants examine the effectiveness of strategies in different situations.

**Friday, 26 March 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**APRIL**

**113 Coalition Building: Creating Consensus**

It is no easy task to bring together diverse groups of people to build coalitions and create consensus. However when consensus is achieved the results tend to be more sustainable over time. This course examines the techniques and practices of creating consensus. It provides practical tips for elected officials and staff who have a leadership or facilitative role in building coalitions. Whether it is an interdepartmental project team, a community task force, or an intergovernmental collaboration, this course provides hands-on skills in creating, leading, facilitating and keeping coalitions on track.

**Friday, 9 April 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**310 County Health Care Systems – The Responsibilities and Resources**

Health care and public health services are among the most critical county services and among the most complex to understand. What are the mandated responsibilities for counties? What are the sources of funding? How are services provided? What are the consequences of state and county program reductions? These are among the questions explored in this policy-makers course on county public health services. Aspects examined include indigent care, Medi-Cal services and public health. Participants use case studies to look at a range of strategies and consider opportunities for sorting out health care priorities when resources are so severely limited.

**Thursday, 22 April 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**150 Local Governance in California**

California has a complex system of providing state, federal and local services through local governments. It is often difficult to understand or explain the broad responsibilities counties have to provide a vast range of often unrelated services. This course provides an overview of government structure and responsibilities in California with a focus on how it relates to counties.

**Friday, 23 April 2010**  
10:00–3:30  
Oakland  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**372 To Do or Not to Do: Leadership in Decision Making**

Most of us have experienced decision-making as a one-step process—just do it! There is much more, however, to leadership in effective problem solving and decision-making. This best practice course examines how values and past experience guides one in perceiving facts when engaged in decision making and ways to apply problem solving and decision making techniques. The course introduces a step-by-step approach to problem solving and introduces participants to some handy problem solving and decision making tools.

**Thursday, 29 April 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**MAY**

**361 Effective Partnerships with County-Funded CBO’s**

Many counties fund and rely on community-based organizations (CBOs) to provide a range of county services. The success and effectiveness of the services delivered depends on the nature of the relationship between the county and the CBO? Are both the County and the CBO maximizing the resources available? Find out in this course on how to select, establish and maintain effective relationships with CBOs, indicators of success or problems, and how to get a relationship with a CBO back on solid ground.

**Thursday, 17 June 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**JUNE**

**307 Realignment 101: How Did We Get It? Where Did it Go?**

You hear about realignment at every budget hearing. The formulas make your eyes glaze over yet you know it’s critical in funding county safety net services. What is realignment, where did it come from and how does it work? This course examines the history and rationale for establishing it and why programs were included or added over the years. Participants examine the mechanics and what programs realignment funds today. Particularly challenging issues are addressed such as IHSS, mental health services, Prop. 53 care decisions, and California Children’s Services. The course explores what the future holds and potential impacts of federal health reform.

**Friday, 18 June 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**114 Public Engagement: Involving the Community in Decision Making**

Community involvement is a key to idea generation, effective decision-making and public acceptance of decisions. But how can you engage the fullest participation and encourage a clear, civil and informed exchange of views? This course explores practical tips to maximize the effectiveness of public forums, hearings, town halls, and other forms of community engagement. Participants examine techniques that help the public take into account the hard choices and trade-offs in decisions, and how to demonstrate that public ideas and recommendations are taken seriously.

**Friday, 11 June 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**303 County Mental Health Obligations, Services and Funding**

Counties are the primary providers of community mental health services. This survey course introduces the statutorily mandated responsibilities and other services counties provide. It examines innovative approaches to mental health services and highlights funding opportunities for those services. Participants explore county approaches to services for those involuntarily committed and services for special-education students. This course provides decision-makers with the questions to ask and how to explain county mental health services.

**Thursday, 20 May 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

**360 Managing Conflict (even hostility) and Disagreement in Comfort**

Conflicts and disagreements are a fact of life in counties. They can contribute to better outcomes or can lead to an escalating situation. Transform the most difficult circumstances into a satisfying experience for all involved. This course helps County Supervisors and executives identify constructive approaches to positively managing conflict whether from the dais, in a meeting, or one-on-one. Participants develop tools to quickly analyze and respond to difficult situations and create practical, positive outcomes.

**Friday, 14 May 2010**  
10:00–3:30  
Sacramento  
+ $75/person for counties  
+ 3 credits  
+ Board/Execs

To register for classes please visit: **www.csacinstitute.org**

UPDATED 11 December 2009.  
Schedule subject to change. Please see website for current details.
Health Care and California Counties
*A Four-Course Series on Understanding County
Health Care Obligations and Financial Resources*

California Counties are touted as the “safety net” for health care in California. Through a complex system of care and financial resources, counties are obligated to provide health care, mental health and public health services. This series of four courses examines the service obligations, system of care and financial resources available. It looks into the future on how health care reform may affect county health services.

**For County Supervisors, Senior Executives and Managers**

Each of these courses are designed to help senior county officials better understand health care issues, legal requirements and funding streams at a policy level, and how their decisions will affect health care services in the county.

**Hands-On Learning**

Interactive presentations and small group discussions highlight each class and provide participants with a hands-on, policy-level examination of health issues. Small groups share county-level approaches. Participants receive content-rich resources and reference materials.

**Expert Faculty**

Faculty for each course are recognized experts in the fields of health, mental health public health and health care funding. They bring practical experience in both crafting state policy and implementing services in counties.

---

**County Health Care Systems – The Responsibilities and Resources**

CI 310

Health care and public health services are among the most critical county services, and among the most complex to understand. What are the mandated responsibilities for counties? What is the source of funding? How are services provided? What are the consequences of state and county program reductions? These are among the questions explored in this policy-makers course.

The class examines two major aspects: indigent health care and public health. Topics include:

- Overview of the statutory requirements
- The spectrum of how counties fulfill their obligations, from contract services to full service hospitals
- State code requirements and public expectations for public health services
- Funding sources and the impacts of health care reform

With the recent attention to H1N1 the role of the counties in public health emergencies has again come to the surface. Participants examine the range of mandated and discretionary public health programs, and preparation for public health emergencies. Find out the questions to ask in this important class.

**Thursday, 22 April 2010**

Sacramento

- $75/person for counties
- 3 credits

**NEW – Approved for 4.5 MCLE credits**

See the other side for three more health services courses you won’t want to miss:

- Mental Health Services
- Effective Partnerships with CBO’s
- Realignment 101
Effective Partnerships with County-Funded Community Based Organizations  CI 361

Many counties fund and rely on community-based organizations (CBOs) to provide a wide range of county health and social services. The success and effectiveness of the services delivered depends in part on the nature of the relationship between the county and the CBO. Are both the County and the CBO maximizing the resources available? What kind of relationship do you have with your CBO service providers?

Find out in this course on how to select, establish and maintain effective relationships with CBOs, indicators of success or problems, and how to get a relationship with a CBO back on solid ground.

Topics include:
♦ Balancing service delivery with accountability
♦ How to respond to non-compliant or problem CBOs
♦ County’s role in CBO success
♦ Minimizing administrative duplication

Thursday, 6 May 2010  10:00–3:30
Sacramento  *  $75/person for counties  *  3 credits

County Mental Health Obligations, Services and Funding  CI 303

Counties are the primary providers of community mental health services. This survey course introduces the statutorily mandated responsibilities for mental health services and other services counties provide. It examines innovative approaches to mental health services and highlights funding opportunities for those services. Participants explore county approaches to services for those involuntarily committed, partnerships with law enforcement, and services for special-education students.

Topics include:
♦ Mental health responsibilities
♦ Options for adult and youth systems of care
♦ Funding mechanisms: maximizing revenues
♦ Involuntary commitment

This course provides decision-makers with the questions to ask and how to explain county mental health services and obligations.

Thursday, 20 May 2010  10:00–3:30
Sacramento  *  $75/person for counties  *  3 credits

Realignment 101 – Where Does it All Go? What’s its Future?  CI 307

You hear about realignment at every budget hearing. The formulas make your eyes glaze over yet you know it’s critical in funding county safety net services. What is realignment, where did it come from and how does it work? This course examines the history and rationale for establishing realignment, why programs were included or added over the years, and the critical condition of the program today.

Each of the major realignment service areas is discussed and the funding formulas deciphered:
♦ Indigent health care and public health services
♦ Social services
♦ Mental health services

Participants examine the mechanics and what programs realignment funds today. Particularly challenging issues are addressed such as IHSS, mental health services, Prop. 53 care decisions, and California Children’s Services.

Impacts of Health Care Reform: The course explores what the future holds and potential impacts of federal health reform and the state budget on realignment funding and the services funded by realignment.

Following the CSAC Legislative Conference
Thursday-Friday, 3-4 June 2010
Thursday - 1:30-4:30 and Friday - 8:30-11:30
Sacramento  *  $75/person for counties  *  3 credits

Package Discount
Attend three or more courses in the series for just $60 each.

Click on “multiple courses” when you register

For detailed information and to register for these courses, visit:  www.csacinstitute.org.

Look for information on the website about other Institute courses and about becoming a California Credentialed County Supervisor or a California Credentialed County Senior Executive.
<table>
<thead>
<tr>
<th>LEADS</th>
<th>Leads by Example</th>
<th>Leads Others</th>
<th>Manages Conflict</th>
<th>Communicates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exemplifies strong character and integrity</td>
<td>Provides purpose and direction toward achieving City goals</td>
<td>Resolves conflicts in a positive and constructive manner</td>
<td>Communicates clearly and concisely</td>
<td></td>
</tr>
<tr>
<td>Exhibits loyalty to the City and staff</td>
<td>Creates a sense of excitement</td>
<td>Addresses performance problems and issues promptly</td>
<td>Makes clear and convincing presentations</td>
<td></td>
</tr>
<tr>
<td>Establishes trust with co-workers, staff, and the public</td>
<td>Sets high standards for self and holds self accountable</td>
<td>Strives for win-win solutions</td>
<td>Listens and openly considers ideas and suggestions</td>
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<tr>
<td>Represents self and the City in a professional manner</td>
<td></td>
<td></td>
<td>Keeps others informed</td>
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</table>

<table>
<thead>
<tr>
<th>DEVELOPS</th>
<th>Prepares Self</th>
<th>Develops Others</th>
<th>Motivates</th>
<th>Team Builds</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recognizes own strengths and weaknesses</td>
<td>Supports professional and personal growth</td>
<td>Inspires and motivates others toward goals</td>
<td>Encourages and facilitates cooperation and trust among team members</td>
<td></td>
</tr>
<tr>
<td>Extracts learning from failure</td>
<td>Helps people learn</td>
<td>Encourages initiative</td>
<td>Fosters commitment and team spirit</td>
<td></td>
</tr>
<tr>
<td>Continually strives to expand knowledge</td>
<td>Coaches, counsels, and mentors</td>
<td>Rewards people for their effort and achievements</td>
<td>Manages an inclusive workplace that maximizes the talents of each person</td>
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<tr>
<td>Understands the importance of the process which elected the Council, the importance of public service, and is committed to advancing the well-being of the community</td>
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<table>
<thead>
<tr>
<th>ACHIEVES</th>
<th>Creates a Vision</th>
<th>Encourages Creativity</th>
<th>Makes Decisions</th>
<th>Gets Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates effective strategies consistent with City policies, practices, and philosophy</td>
<td>Creates a work environment that encourages creative thinking</td>
<td>Accepts changes and adapts behavior and work processes</td>
<td>Translates ideas into concrete actions</td>
<td></td>
</tr>
<tr>
<td>Builds a shared vision with others</td>
<td>Identifies innovative and non-bureaucratic solutions</td>
<td>Encourage decision-making on the front lines</td>
<td>Accomplishes tasks consistently</td>
<td></td>
</tr>
<tr>
<td>Sets clear goals and expectations</td>
<td>Designs and implements innovative processes and programs</td>
<td>Looks for decisions that will endure the test of time and future generations will love</td>
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**LEADERSHIP COMPETENCIES**

**Core Leader Competencies**
Leadership Academy
Schedule of Sessions

- **January 2010:** 7 Habits of Highly Effective Leaders
- **February:** Leading with Emotional Intelligence
- **March:** Achieving Leadership Success Through People
- **April:** Encouraging Creativity
- **May:** The Visionary Process
- **June:** Leading from the Middle
- **July and August:** Summer Reading Assignment
- **September:** Review of summer reading and How to Facilitate Effective Community Meetings
- **October (2 sessions):** Presentation Skills and Mock Community Meeting with Leadership Alumni
- **January 2011:** Professional Goal Setting and Career Management
- **February:** Speed Mentoring with Executive Team and Leadership Alumni
- **Continues through June 2011**
Performance Evaluation
HUMAN RESOURCES

EMPLOYEE NAME: [REPLACE WITH ACTUAL NAME]
JOB TITLE: [REPLACE WITH ACTUAL JOB TITLE]
DEPARTMENT: [REPLACE WITH ACTUAL DEPARTMENT]
DIVISION: [REPLACE WITH ACTUAL DIVISION]
RATING PERIOD: From: [REPLACE WITH ACTUAL FROM DATE] To: [REPLACE WITH ACTUAL TO DATE]
TYPE OF REVIEW: □ ANNUAL □ PROBATION* □ OTHER
* For Probationary Period Evaluations Only
□ 3-Month □ 6-Month □ 9-Month □ Other

Ratings
Rate the employee’s performance in each area using the following four-point scale:

4—EXCEPTIONAL
Performance consistently exceeds expectations; regularly performs above and beyond what is required. Demonstrates superior level of expertise in the majority of the position’s requirements and duties.

3—SUCCESSFUL
Performance consistently meets expectations and occasionally exceeds some expectations. Successfully performs at an effective level. Demonstrates required competencies to meet all of the position’s requirements and duties. Successful performance meets the City’s high standards.

2—NEEDS IMPROVEMENT
Meets some performance expectations of the position, but not on a consistent basis. Demonstrates some of the required competencies needed for the position; however, improvement is needed in order to fully meet the City’s high standards.

1—UNACCEPTABLE
Does not meet most performance expectations. Does not demonstrate the required competencies to perform job. Significant improvement is needed in order to meet the requirements of the position.

Evaluation Sections
1) Job Performance 2) Core Competencies 3) Technical Competencies
4) Leadership Competencies* 5) Performance Goals & Development Areas 6) Overall Evaluation

Each section is designed to evaluate a different aspect of an employee’s job performance during the evaluation period. Ideally, the performance evaluation is a summary of observations and previous discussions between a supervisor and an employee. The evaluation should be conducted in a spirit of recognition for performance well done and with direction on performance areas to be improved. Areas cited in any section as "needs improvement" or "unacceptable" should be carried to and noted in the "Performance Goals and Development Areas" section.

*Leadership Competencies only need to be completed for employees with official supervisory or management responsibility as noted in their job description.
Consider how the employee’s job-related behaviors impacted his/her accomplishment of the position’s responsibilities. Note specific examples of the observed performance in the Comments/Examples field.

**JOB-RELATED BEHAVIORS**

<table>
<thead>
<tr>
<th>Behavior</th>
<th>Rating</th>
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<tbody>
<tr>
<td>Productivity (produces expected amounts of acceptable work; maintains high productivity without close supervision; meets deadlines)</td>
<td></td>
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<tr>
<td>Prioritization (appropriately performs tasks in order of importance)</td>
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<tr>
<td>Quality (produces work that is error-free, accurate, and professional)</td>
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<tr>
<td>Problem Solving (exercises good judgment when problems/issues arise)</td>
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<tr>
<td>Proactive (shows initiative; anticipates issues)</td>
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<tr>
<td>Open to Feedback (receptive to thoughts shared by others; remains positive)</td>
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<tr>
<td>Attendance (adheres to assigned work schedule; follows leave request procedures)</td>
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<tr>
<td>Accountability (reliable; accepts personal responsibility)</td>
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<tr>
<td>Safety Awareness and Practice (follows proper safety procedures in the performance of job; uses personal protective equipment)</td>
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<tr>
<td>Computer Skills (understands and effectively uses computer programs)</td>
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</table>

Comments/Examples:

**CORE COMPETENCIES**

The core competencies identified for the position’s job family are listed below. Consider how the employee performed the core competencies during the evaluation period. Note specific examples of the observed performance in the Comments/Examples field.

**COMMUNICATION SKILLS**

<table>
<thead>
<tr>
<th>Skill</th>
<th>Rating</th>
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<tbody>
<tr>
<td>Communicates effectively in person with individuals</td>
<td></td>
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<tr>
<td>Communicates effectively in person with groups</td>
<td></td>
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<tr>
<td>Communicates effectively in writing (uses proper grammar and City’s standards)</td>
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<tr>
<td>Shares ideas, information, and feelings in a constructive and positive manner</td>
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<tr>
<td>Listens to and objectively considers ideas and suggestions from others</td>
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<tr>
<td>Asks questions for clarification or direction</td>
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<tr>
<td>Shares relevant information openly, honestly, and in a timely fashion</td>
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<tr>
<td>Uses appropriate communication methods</td>
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</table>

Comments/Examples:
CUSTOMER SERVICE (internal and external customers)

Quickly and effectively addresses customer problems
Seeks and obtains information from appropriate sources
Uses skillful questioning to draw out needed information
Communicates with the customer in a positive manner
Follows up with customers and coworkers

INTERPERSONAL SKILLS

Works effectively with coworkers and/or the general public
Builds constructive and effective relationships
Uses diplomacy and tact
Treats others with respect, compassion, and sensitivity
Responds appropriately to needs of diverse people in different situations
Keeps commitments
Manages conflict and disagreements in a positive and constructive manner

ORGANIZATIONAL AWARENESS

Based on role in the organization, demonstrates an understanding of:
The City's philosophy and culture
The City's structure (which departments do what; whom to contact)
City policies and procedures
The role of the City Council and commissions

DECISION MAKING/PROBLEM SOLVING

Proactively tackles problems using a logical, systematic, and sequential approach
Analyzes issues and reviews options
Seeks creative and non-bureaucratic solutions
Engages other City staff and/or community members in the problem solving process
Makes timely and effective decisions

Comments/Examples:

PROJECT MANAGEMENT

- Effectively develops, manages, and processes projects
- Oversees or manages each phase of the project and identifies and resolves issues
- Informs and updates stakeholders on project status
- Achieves milestones/meets deadlines
- Commits and manages appropriate resources including staff, time, and money

Comments/Examples:
technological competencies

In the space below, identify key technical competencies required to perform the position's essential functions. Rate the employee's overall performance as demonstrated during the evaluation period and describe examples of observed performance. Examples of technical competencies may be found in the "Essential Functions" or "Knowledge, Abilities, and Skills" sections of the job description.

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</table>
**LEADERSHIP COMPETENCIES**

The Leadership Competency rating sheet should be completed for employees who have **official supervisory or managerial responsibilities as noted in their job description**. As with the other competencies, rate the employee’s performance level as demonstrated during the evaluation period and include specific examples of observed performance.

### LEADS

<table>
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<tr>
<th>Competency</th>
<th>4</th>
<th>3</th>
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<tbody>
<tr>
<td>Leads by Example (sets high professional standards)</td>
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<tr>
<td>Leads Others (provides purpose and direction, sense of excitement)</td>
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<tr>
<td>Manages Conflict (resolves conflict in a prompt, positive manner)</td>
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<td></td>
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<tr>
<td>Communicates (clearly, concisely &amp; timely; listens; keeps others informed)</td>
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</table>

**Comments/Examples:**

### DEVELOPS

<table>
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<th>4</th>
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<th>2</th>
<th>1</th>
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<tbody>
<tr>
<td>Prepares Self (recognizes strengths &amp; weaknesses, strives to expand knowledge)</td>
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<td></td>
</tr>
<tr>
<td>Develops Others (coaches, counsels &amp; mentors)</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Motivates (encourages &amp; rewards employee achievements)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Team Builds (encourages cooperation, fosters team spirit)</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Comments/Examples:**

### ACHIEVES

<table>
<thead>
<tr>
<th>Competency</th>
<th>4</th>
<th>3</th>
<th>2</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates a Vision (creates effective strategies, sets clear goals &amp; expectations)</td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Encourages Creativity (identifies &amp; implements innovative programs &amp; processes)</td>
<td></td>
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<tr>
<td>Makes Decisions (makes difficult decisions in ambiguous &amp; critical situations)</td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Gets Results (translates ideas into actions, accomplishes tasks consistently)</td>
<td></td>
<td></td>
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</tr>
</tbody>
</table>

**Comments/Examples:**
### PERFORMANCE GOALS AND DEVELOPMENT AREAS

#### CURRENT GOALS/DEVELOPMENT AREAS
List the goals/development areas identified on the employee’s previous performance evaluation. Note the status of each goal by providing comments and assigning the appropriate rating.

**Ratings:** A = Achieved;  P = In Progress;  N = Not Attained

<p>| | | | |</p>
<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>A</td>
<td></td>
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<td></td>
<td></td>
<td>P</td>
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<td></td>
<td></td>
<td>N</td>
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<tr>
<td>2</td>
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<td>A</td>
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<td></td>
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<td>N</td>
<td></td>
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<tr>
<td>3</td>
<td>(optional)</td>
<td>A</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(optional)</td>
<td>P</td>
<td></td>
</tr>
<tr>
<td></td>
<td>(optional)</td>
<td>N</td>
<td></td>
</tr>
</tbody>
</table>

#### FUTURE GOALS/DEVELOPMENT AREAS
Identify at least two goals and/or development areas on which the employee should focus during the next evaluation period. While overall job performance may be successful, performance goals and development areas are designed to further enhance aspects of the employee’s performance (for example, by working on specific projects, assignments, or new/varied duties).

<p>| | | | |</p>
<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
<td></td>
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<tr>
<td>2</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>(optional)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
OVERALL EVALUATION

SIGNIFICANT ACCOMPLISHMENTS
List the employee's major accomplishments during the evaluation period.

OVERALL RATING
Taking into account the employee's performance as noted in all sections of this evaluation, please rate the OVERALL performance during this evaluation period.

With the exception of probationary evaluations, time in the current assignment is not a factor in evaluating performance. Employees are to be rated on the performance of job duties and competencies rather than the amount of time in the position.

<table>
<thead>
<tr>
<th>Exceptional</th>
<th>Successful</th>
<th>Needs Improvement</th>
<th>Unacceptable</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

SUPERVISOR'S OVERALL COMMENTS:

EMPLOYEE'S COMMENTS:

SIGNATURES AND ACKNOWLEDGEMENTS

Supervisor: ____________________________ Date: __________
Division Manager: ______________________ Date: __________
Director: _____________________________ Date: __________
Employee: _____________________________ Date: __________

NOTE TO EMPLOYEE: Your signature on this evaluation indicates only that you have seen and reviewed the document with your supervisor. You may provide comments in the space above or attach a separate sheet, which will become part of your performance record.
# Financial Management Skills Inventory & Resources

Name: ____________________________  Agency: _____________________________

Current Position: ________________  Career Target: __________________ Date: _____

## Key Skill Sets

<table>
<thead>
<tr>
<th>Key Skill Sets</th>
<th>Demonstrated Assets</th>
<th>Targeted Development</th>
<th>Resources to Develop Skills</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. <strong>Technical Knowledge</strong></td>
<td></td>
<td></td>
<td>a. CSMFO Basic Accounting Course (check with local Chapter)</td>
</tr>
<tr>
<td>a. Basic accounting</td>
<td></td>
<td></td>
<td>b. CSMFO Intermediate Accounting Course (delivered by Moreland &amp; Associates, request from CSMFO office)</td>
</tr>
<tr>
<td>c. Budget</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Revenue mgmt.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>e. Financial planning</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>f. GASB 34</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>g. Performance Measures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>h. Purchasing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>i. Risk mgmt.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>j. Investments</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>k. Debt</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>l. Other</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. <strong>Problem Solving Skills</strong></td>
<td></td>
<td></td>
<td>a. Coaching materials at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
<tr>
<td>a. Prioritizing tasks</td>
<td></td>
<td></td>
<td>b. Coaching panel at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
<tr>
<td>b. Cross-department teams</td>
<td></td>
<td></td>
<td>c. CSMFO Financial Sustainability courses</td>
</tr>
<tr>
<td>c. Financial strategies</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Negotiation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. <strong>Communication Skills</strong></td>
<td></td>
<td></td>
<td>a. and b. “Management Style Profile Report” available at “Coaching Corner” at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
<tr>
<td>a. Written</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Oral presentations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4. <strong>Supervisory Skills</strong></td>
<td></td>
<td></td>
<td>b. Coaching materials at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
<tr>
<td>a. Recruiting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Delegation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>c. Performance evaluation</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>d. Employee development</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5. <strong>Wider Network</strong></td>
<td></td>
<td></td>
<td>a. CSMFO Chapter meetings, CSMFO Annual Seminar; League Fiscal Officers conference</td>
</tr>
<tr>
<td>a. Professional Networking</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>b. Community Involvement</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. <strong>Handling Politics</strong></td>
<td></td>
<td></td>
<td>Coaching panel at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
<tr>
<td>7. <strong>Ethical Practices</strong></td>
<td></td>
<td></td>
<td>CSMFO Code of Ethics and Coaching panel at <a href="http://www.csmfo.org">www.csmfo.org</a></td>
</tr>
</tbody>
</table>
Polling Results

Key Career Competencies and Strategies to Develop Them

Webinar – April 15, 2010

[121 locations participating]

<table>
<thead>
<tr>
<th>Question</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many people are listening on your line?</td>
<td></td>
</tr>
<tr>
<td>1 -- just myself</td>
<td>79%</td>
</tr>
<tr>
<td>2 - 5</td>
<td>19%</td>
</tr>
<tr>
<td>6 - 10</td>
<td>2%</td>
</tr>
<tr>
<td>11 - 20</td>
<td>0%</td>
</tr>
<tr>
<td>21 or more</td>
<td>0%</td>
</tr>
<tr>
<td>Which of the following competencies need attention in your agency?</td>
<td></td>
</tr>
<tr>
<td>Self knowledge -- strengths, weaknesses, hot buttons</td>
<td>48%</td>
</tr>
<tr>
<td>Building coalitions -- collaboration with others</td>
<td>51%</td>
</tr>
<tr>
<td>Adaptive change -- comfort with ambiguity</td>
<td>72%</td>
</tr>
<tr>
<td>Public service value -- the good you want to accomplish</td>
<td>28%</td>
</tr>
<tr>
<td>Roles and powers in governance -- recognize choices in roles</td>
<td>34%</td>
</tr>
<tr>
<td>Which of the following competencies need attention in your agency? cont'd</td>
<td></td>
</tr>
<tr>
<td>Policy creation -- establish guiding principles</td>
<td>47%</td>
</tr>
<tr>
<td>Performance assessment - measures and indicators of progress</td>
<td>70%</td>
</tr>
<tr>
<td>Financial resources -- stewardship of resources</td>
<td>41%</td>
</tr>
<tr>
<td>Human resources -- investing in the great part of budget</td>
<td>40%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>4%</td>
</tr>
<tr>
<td>Does your agency have a formal program for developing competencies?</td>
<td></td>
</tr>
<tr>
<td>Yes</td>
<td>15%</td>
</tr>
<tr>
<td>Starting to develop one</td>
<td>17%</td>
</tr>
<tr>
<td>Thinking about it</td>
<td>23%</td>
</tr>
<tr>
<td>Not on our priority list</td>
<td>37%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>9%</td>
</tr>
<tr>
<td>What's the primary approach your agency uses to develop competencies?</td>
<td></td>
</tr>
<tr>
<td>In-house with formal programs</td>
<td>17%</td>
</tr>
<tr>
<td>Outside or contracted training programs</td>
<td>25%</td>
</tr>
<tr>
<td>Informal on-the-job approach</td>
<td>22%</td>
</tr>
<tr>
<td>Mix of the above</td>
<td>53%</td>
</tr>
<tr>
<td>Not applicable</td>
<td>7%</td>
</tr>
</tbody>
</table>
### How have the ways that people develop and advance in your agency changed?

- **23% Status quo continues**
- **19%** We see need to change, but we haven't made major shifts yet.
- **46%** We are making some progress, but we have much more to do.
- **8%** We have completed major changes in our approaches.
- **5%** Not applicable

### What actions have you taken to build your self-knowledge?

- **32%** Management Style Profile Report (CSMFO, MMANC, MMASC)
- **58%** Myers Briggs or other tool
- **21%** ICMA Competencies
- **12%** CSMFO Financial Management Skill Inventory
- **33%** In-house competencies assessment

### Which of the elements of today’s webinar will help your agency?

- **66%** Identification of key competencies
- **50%** Resources to develop them
- **59%** How to integrate developing, evaluating and advancing talent
- **50%** Programs to develop competencies within an agency
- **74%** Ways to build your personal competencies and advance