Executive Review	2006-2007	CALSTRS

Employee Information	
Name	Review Date
Position Title	Reviewer Signature

RATING SCALE			
Not Observed 0	Development Required 1 2	Competent 3 4 5	Role Model 6 7

I. Key Executive Responsibilities:

1. Board Support • Ensures board materials from branch are developed without errors and within the agreed upon timeframes. • Gives active assistance to board members who may need additional education on issues. • Presentations and written materials are prepared in such a manner to give board members adequate information to weigh the risks and benefits of a decision. • Presentations and written materials provide an adequate balance of detail and simplicity to maximize the efficiency of the meetings yet fully inform the board. • Utilizes experts as needed to present issues or opinions. • Gains legal review of information as needed	
2. Balanced Scorecard • Actively communicates the value and importance of the balanced scorecard to all branch employees • Constructs measurable activities for the Scorecard that directly relate to the organization's priorities • Regularly reviews the progress of the scorecard with branch management team • Proactively supports executive and branch management growth in scorecard and performance measurement concepts • Demonstrates use of agency-wide metrics to produce high-level action plans with executive and branch management • Models collaborative leadership of agency strategies through the ongoing use of cross-functional management teams	
3. Executive Team Participation • Works collaboratively with other execs to solve problems • Keeps discussion focused on key priorities and those aspects related to executive responsibilities • Openly shares issues/problems and actively commits to taking appropriate accountability and responsibility • Participates in a manner to engender trust among the team • Actively participates, add constructive energy and brings relevant ideas/issues to weekly meetings • Stays on task and moves issues to closure	

II. Cultural Dimensions:

1. Customer Connected • Understands/responds to the needs of the customer • Actively solicits views of internal/external customers • Develops action strategies in response to customer data	
2. Results Oriented • Knows what results are needed • Links short-term actions and long-term goals • Drives for results (with attention to budgetary constraints) • Strives for continuous improvement	
3. Action Oriented • Quick response/strong sense of urgency • Sets clear priorities and able to effectively execute • Acts decisively including when tough decisions are necessary • Strives for timely implementation • Takes calculated risks • Reallocates time/resources quickly in response to changed circumstances	
4. Line Driven • Assumes responsibility for decisions/results • Resists excessive bureaucracy • Translates strategy/objectives into clear measurable actions	
5. Team Oriented • Seeks solutions to conflict • Fosters open discussion • Builds relationships across work groups and organizations • Understands when to use teams and when to use individual contribution	
6. Empowered People • Avoids decisions which could be handled better at a lower level • Coaches and supports people • Actively solicits the opinions of employees through formal (survey) and informal means – takes clear action in response to input. • Actively recognizes achievement informally and formally • Delegates authority and resources as appropriate	
7. Open and Honest Communication • Sensitive to the concerns and feelings of others • Does not treat disagreement as disloyalty • Encourages feedback, dialogue and information sharing • Fosters openness and trust through personal behavior • Confronts conflict openly	
8. Organization Reflection and Learning • Sees problems as learning opportunities • Role model in self-development • Encourages others to learn from success and failures • Treats new ideas with respect • Encourages sharing of knowledge • Redirects action based on learning from past experiences	

III. Managing Diversity:	
• Recruits, hires and develops individuals who are different by ethnicity, culture, gender, sexual orientation, disability, age, etc. • Ensures equity is applied across all human resource practices • Creates an environment where each individual has the opportunity to achieve his/her full potential • Demonstrates a commitment to all employees	

IV. Leadership Attributes:	
1. Strategic Thinking • Takes a long-range perspective • Understands major trends affecting the business/function • Seeks and interprets competitive benchmarks • Develops strategic alternatives consistent with strategic intent • Identifies opportunities for applying strategic advantage	
2. Strategic Implementation • Converts strategic intent into meaningful work objectives and plans • Allocates resources effectively to meet objectives • Creates appropriate processes for strategy formulation, implementation and assessment • Designs and staffs organization to meet strategic requirements	
3. Inspiring a Shared Vision and Supporting our Core Values • Communicates a clear and inspiring vision • Regularly communicates the importance of CalSTRS core values with employees • Ensures that branch activities and actions are consistent with CalSTRS core values • Achieves the commitment of others	
4. Decision Making • Makes decisions in a timely manner • Wherever possible manages by fact • Uses best sources of information available as a basis for decisions in uncertain situations • Gains appropriate legal review as needed • Assumes responsibility for the results of decisions made • Takes calculated risks to seize opportunities	
5. Managing Organizational Risks/Costs • Attentive to assessing areas of risk and making improvement to internal controls. • Identifies areas for improvement for information security and implements changes • Prioritizes, organizes and controls resources effectively • Regularly reviews budget and expenditures • Ensures expenditures within branch are fully compliant with CalSTRS policies and constraints • Continually reaches for more cost-efficient practices	
6. Staffing for High Performance • Understands the skills and experience of his/her people • Recruits talented people • Values diversity in the work place • Regularly assesses the performance of the branch management team to ensure its execution meets organization's goals, priorities and timing • Actively breaks down silos to bring greater collaboration among operating units	

• Effectively manages vacancies to ensure resources are adequate to work load demands • Diverts resources accordingly to manage peak/seasonal workflows	
7. Developing Organization Talent • Recognizes the importance of development to the organization's success • Encourages and serves as a role model for personal and professional growth • Devotes time to development activities	
8. Openness to Change • Open to new ideas/experiment • High tolerance for change/ambiguity • Seeks information from others, using input to make change occur • Willing to change plans/strategies when circumstances warrant	
9. Interpersonal Empathy & Understanding • Recognizes the impact of his/her behavior on others • Sensitive to the moods/feelings/motivations of others • Encourages effective behavior in others • Genuine commitment to the well-being of others	
10. Personal Drive • Demonstrates a deep-seated need for achievement and excellence • Consistently exceeds expectations • Perseveres	
11. Personal Strength and Maturity • Resilient to stress • Keeps a realistic, but optimistic outlook for the future when faced by adversity • Accepts the consequences of difficult decisions • Learns from mistakes	
12. Personal Consistency • Behaves with openness and predictability • Maintains consistency between words and actions • Actions support CalSTRS values	
13. Overall Technical Knowledge • Understands the portfolio of products and services, how they integrate and are used	

FY 2005-2006 Incentive Pay Recommendation: _____%

_____
Executive Signature/Date (acknowledgement of evaluation and award)

_____
Reviewer Signature/Date

Supporting Documentation:

FY 2005-06 Achievements (see attachments)