

Leadership Appraisal Form

MONTANA PUBLIC EMPLOYEE RETIREMENT ADMINISTRATION

EMPLOYEE: Dore Schwinden

TITLE: Executive Director

REVIEW PERIOD: FY15 (July 2014 – June 2015)

REVIEWER: Public Employees' Retirement Board

| Objectives/Accomplishments | |
|---|------------------------------|
| Objective Detail | Result(s) |
| 1. Build a productive working relationship with the Governor, Governor's Staff, Department of Administration, and OBPP. | Click here to enter comments |
| 2. Transition the Board meeting schedule from monthly to six meetings per year. | Click here to enter comments |
| 3. Improve/increase educational opportunities for employers, members and stakeholders. | Click here to enter comments |
| 4. Ensure the full, on time and successful implementation of the MPERAtiv project. | Click here to enter comments |
| 5. Implement the MPERA legislative agenda. | Click here to enter comments |
| 6. Complete the Executive Director transition and evaluation process. | Click here to enter comments |
| 7. Continue to foster mutual support and interaction between the Board and MPERA staff. | Click here to enter comments |
| 8. Improve customer service through realignment of business flow and communication. | Click here to enter comments |

Performance Rating: (NI) - Needs Improvement, (ME) - Meets Expectations, (EE) - Exceeds Expectations

| Leadership | ED | PERB |
|---|--------|--------|
| Displays high integrity and honesty, honors commitments, and is a role model for the organization. | Rating | Rating |
| Has a strategic orientation, maintaining a clear perspective between the overall picture and the details, and helps others understand the organization's vision and how to translate this into meaningful objectives. | Rating | Rating |
| Champions change and can quickly recognize situations where change is needed. | Rating | Rating |
| Effectively communicates performance expectations and issues with staff; provides guidance and opportunities to staff members for their development and advancement. | Rating | Rating |
| Promotes cooperation between work groups and effectively resolves conflicts. | Rating | Rating |

| | |
|--|--|
| Executive Director Comments (self-appraisal): Click here to enter comments | PERB Summarized Comments: Click here to enter comments |
|--|--|

| Technical/Functional Expertise | | ED | PERB |
|--|--|-----------|-------------|
| Utilizes skills and knowledge in making a contribution to achieve organizational results. Stakeholders trust his/her ideas and opinions on agency matters. | | Rating | Rating |
| Solves problems and analyzes issues. Identifies new trends, potential problems, and opportunities early. | | Rating | Rating |
| Executive Director Comments (self-appraisal): Click here to enter comments | PERB Summarized Comments: Click here to enter comments | | |

| Focus on Results | | ED | PERB |
|---|--|-----------|-------------|
| Achieves agreed upon goals within the time allotted. Can always be counted on to follow through on commitments. | | Rating | Rating |
| Motivates others to achieve exceptional results. | | Rating | Rating |
| Takes initiative and seeks opportunities to take on challenging goals for which he/she is held accountable. | | Rating | Rating |
| Supports innovation and creates an atmosphere of continued improvement. | | Rating | Rating |
| Executive Director Comments (self-appraisal): Click here to enter comments | PERB Summarized Comments: Click here to enter comments | | |

| Building Working Partnerships | | ED | PERB |
|--|--|-----------|-------------|
| Demonstrates the ability to represent the organization in key forums. | | Rating | Rating |
| Develops strong working partnerships and communicates effectively with key stakeholders. | | Rating | Rating |
| Executive Director Comments (self-appraisal): Click here to enter comments | PERB Summarized Comments: Click here to enter comments | | |

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| Overall Comments and Observations |
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|--|--|
| Employee Comments (self-appraisal): Click here to enter comments | PERB Summarized Comments: Click here to enter comments |
|--|--|

Executive Director Signature

Date

PERB President Signature

Date

Executive Director Performance Evaluation Process

FY15 Timeline

| Activity | Complete by | Responsible |
|--|---------------|---|
| Formulate objectives for FY15 | August 2014 | Exec. Director and Personnel Committee |
| Board review and approval of objectives | October 2014 | PERB |
| Review and discuss progress to FY15 objectives | February 2015 | Personnel Committee |
| Solicit and gather feedback for use in Exec. Director Evaluation <ul style="list-style-type: none">Board, MPERA Mgmt Team, other Stakeholders | May-June 2015 | Personnel Committee (Facilitated by DOA Human Resources) |
| Complete Evaluation Document <ul style="list-style-type: none">Executive Director completes self-appraisal component.Compile and summarize PERB component of evaluation document. | June 2015 | Exec. Director and Personnel Committee |
| Performance Evaluation Discussion <ul style="list-style-type: none">Begin to identify objectives and focus for FY16 as part of this discussion. | July 2015 | Exec. Director and PERB |