



Process for Directors of Small Independent Agencies, Boards, and Commissions

STEP ONE - Preparation

Small independent agencies, boards, and commissions will complete agency head 360 evaluation following review timeline within statute, or at least every two years. Agency head must be in the role for at least a year before the Performance Review is conducted.

Agency Director and/or Board Chair or other delegate will work together and with HR manager (where applicable) to create a contact list and number of evaluators in the following categories:

All Direct Reports and/or Executive Team Members	As applicable
Parties of Interest (party benefits in some way from the relationship)	Up to agency discretion <i>best practice = 12-15 evaluators</i>
Peers	
Board and Commission members	Where applicable
Agency Labor Leaders	Where applicable

**Evaluators should be selected who have the most access and interaction with agency Director*

STEP TWO - Communication

Email announcement

Board Chair/HR Manager or other delegate will send an email (example text below) to every evaluator notifying them that they've been selected to provide feedback on the Agency Director, and provide feedback platform (e.g. survey link, email, etc.).

Email Template Example (From Board Chair/HR Manager)

Dear <evaluator's name>,

In order to meet Governor Kotek's expectations that each agency Director and Executive Director be evaluated every 2 years, your name was provided by <Director's Name> of <Agency Name> to provide feedback on their performance. Below please find the link/option to complete your feedback.

The survey is composed of mostly multiple-choice questions with an opportunity to provide any additional comments you like. The survey should take no more than 20 minutes to complete. The answers will be amalgamated and anonymous. A summary of the multiple-choice results will be shared with the Board/Commission, Governor's Office and DAS Director to review with the Director. Please note, optional text fields will also be summarized and anonymous, your name will NOT be attributed to any responses. Please complete and submit the survey no later than 14 days to the date you received this invitation.

*If you have process questions, please contact:
Board Chair, HR Manager or other delegate*

Bi-Annual Agency Performance Reviews
Process for Directors of Small Independent Agencies, Boards, and Commissions



Schedule

Agency Directors will have a Performance Review at least every two years. Agency Director needs to be in the role at least 1 year prior to the first performance review. (Note: [schedule](#) is subject to change depending on agency head start dates or other factors impacting timeline.)

Survey completion timeline

Evaluators will have two weeks (10 working days) from receiving request to complete the survey.

Reminder emails

Board Chair/HR Manager or other delegate will send out reminder email to evaluators, one week prior to the deadline, and another reminder the Friday before the Monday deadline.

STEP THREE - Completion

Evaluators to complete the Agency Performance Review survey. See survey questions starting on page 3.

Thank You emails

It is recommended that Agency Directors send out a thank you to each evaluator thanking them for taking time to fill out the survey and providing feedback. To help, Agency Directors will be provided with the thank you template below.

Dear <Evaluator>.

Thank you for taking time to provide feedback on my performance as Director of <Agency name>. The feedback given provided important data that strengthens our organization and demonstrates <Agency name> commitment to the Governor's priorities of accountability and transparency in state government.

Your contribution to this process is appreciated.

<Director's name>

<Agency name>

STEP FOUR – Evaluation

Performance Evaluation Report

Board Chair/HR Manager or other delegate will collect the data and aggregate it into an executive summary with the following elements:

- Director's Name
- Agency Name
- Number of responders, categories represented if available
- Aggregated scores for each of the survey questions
- Additional summarized comments and feedback



STEP FIVE – Sharing the Results

The following process will be followed for distribution of results.

- Beginning July 2024 the Agency Head will receive notice from CHRO at least 60-days in advance of their [review month](#). (Note: [schedule](#) is subject to change depending on agency head start dates or other factors impacting timeline.)
- Agency Head Performance Reviews are expected to be completed by the end of month in which they are scheduled.
- Upon closing of the Performance Review Survey, Board Chair/HR manager or other delegate will send the Agency Head Summary Document to CHRO.
- CHRO will simultaneously send the completed Performance Review document/report to the Agency Director and the State COO, to ensure all parties have ample time to review the results of the evaluation.
- COO will share the Performance Review Document with the appropriate Governor's Office staff/Board Chair and schedule a meeting with the Agency Head within 30-days of receiving the Performance Review Survey results.
- Following the COO/Gov Office meeting with the Agency Head, any identified areas for assistance will be shared with appropriate DAS groups to develop plans to assist the agency in addressing identified goals.



SMALL BOARDS AND COMMISSIONS MAY CHOOSE TO ADD ADDITIONAL QUESTIONS THAT APPLY TO THEIR BUSINESS; HOWEVER, THE FOLLOWING QUESTIONS MUST ALSO BE INCLUDED IN THE FEEDBACK REQUEST.

What is your professional relationship with this individual director?

- *Direct report/ executive team member*
- *Person of interest*
- *Peer*
- *Board or Commission member (if applicable)*
- *Union leader*
- *Self (opportunity for self-evaluation)*

Are you a Board/Commission Member?

- Yes (If yes is chosen the following questions will apply)

Additional Board or Commission Agency Questions (for board members)

- What has the board done well or effectively to support the director?
- What might the board have done differently?
- What support is needed from the board moving forward?
- Please add these questions to the survey:

○

- No

Additional Board or Commission Agency Questions (for the executive director's self-survey)

- What has the board or commission done well or effectively to support you in your role?
- What might the board have done differently?
- What support do you need from the board moving forward?

This individual promotes a customer service centered organization.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual collaboratively manages the resources they are entrusted with to achieve the best possible outcomes for Oregonians.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual embraces and leads through change.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe



This individual creates and fosters an environment where everyone has access and opportunity to thrive.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual owns and takes responsibility for quality of outcomes for Oregonians.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual aligns to the goals and direction of the Governor.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual operates with urgency, transparency, and accountability.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual is honest and transparent regardless of the situation.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual is consistent in communicating to their own agency what is happening at the enterprise level (executive branch).

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual regularly shares what is happening within their agency.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe



This individual builds DEI organizational capacity.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

This individual fosters and promotes an inclusive workplace environment.

1. Unacceptable
2. Acceptable
3. Effective
4. Very Effective
5. No opportunity to observe

What are some leadership strengths you've observed in this individual?

What are some leadership opportunities for growth in this individual?

Additional comments or feedback