**OPRA**

**PRESIDENT SELF-EVALUATION**

In each area, rank yourself on the performance factors using the following:

**5 = OUTSTANDING** Performance at this level is clearly unique and far in excess of established explanations. You consistently exceed expectations in the outcomes achieved in work quality, quantity and timeliness. You exhibit leadership among peers in all dimensions of the field of work performed.

**4 = SIGNIFICANTLY EXCEEDS EXPECTATIONS** Performance at this level often exceeds established expectations and standards for work quality, quantity and timeliness. You exhibit mastery of most dimensions of the field of work performed.

**3 = FULLY CAPABLE** Performance at this level is satisfactory on the established expectations and standards for work quality, quantity and timeliness. You competently achieve the requirements of this position.

**2 = NEEDS IMPROVEMENT** Performance at this level is minimally capable and below the level expected of you. Improvement is required in significant dimensions of the job in order to meet the expectations and standards for work quality, quantity and timeliness.

**1 = UNSATISFACTORY** Performance at this level is unacceptable. You often fail to achieve basic requirements of the position and has exhibited little or no improvement in job performance.

**1. ADMINISTRATION**

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| PERFORMANCE FACTOR | PERFORMANCE RANK |
| a. PLANNING – Develops short and long range plans and goals to meet OPRA Strategic Plan objectives consistent with established priorities; sets appropriate priorities of needs and resulting services to be provided; anticipates and prepares for future requirements and devises contingencies; devises realistic plans. | 4 |
| b. BUDGETING AND ECONOMIC MANAGEMENT – Prepares an appropriate budget and subsequently adheres to it; utilizes finances, budgets, facilities, equipment, materials and products to minimize costs; actively practices cost containment. | 4 |
| c. ORGANIZATION OF WORK – Structures work in order to avoid crisis, promotes productivity, attains cost effectiveness. Involved in this process are the tasks of allocating work, delineating responsibilities, scheduling activities, and adequately preparing for meetings and presentations. | 3 |
| d. COMPLIANCE – Complies with established policies, procedures and directives; conducts functions in accordance with applicable laws, statutes, and regulations. | 4 |
| e. PROBLEM SOLVING AND DECISION-MAKING – Identifies problems and acts to rectify them by employing analytical thinking and sound judgment. | 4 |
| f. EVALUATION AND CONTROL – Practices regular and systematic review of OPRA operations to evaluate progress toward established goals; evaluates strategies being deployed to achieve those goals; implements remedial measures when necessary. | 4 |
| g. RISK (LIABILITY) MANAGEMENT - Ensures that liability risk exposures are identified and treated when proposing new advocacy initiatives and member services; evaluates and monitors established advocacy initiatives and member services to identify areas which need revision due to changes in operation, legislation, policies and procedures; implements changes where needed to facilitate favorable loss experience. | 4 |

**COMMENTS FOR THE CATEGORY OF “ADMINISTRATION”:** Generally I believe I do well in this area. I continue to find ways to maximize my organization and have been paying special attention to getting the internal support I need to be successful. I have also worked to improve my timeliness in getting information out prior to committee and other meetings.

**2. INTERPERSONAL**

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| PERFORMANCE FACTOR | PERFORMANCE RANK |
| a. RELATIONSHIP BUILDING – Treats individuals fairly and with dignity and respect. Works well with other OPRA staff. Interacts appropriately with general membership, board members, vendors, ANCOR and governmental agency representatives. Works well with people representing a wide range of backgrounds and styles. | **4** |
| b. ORAL COMMUNICATION – Effectively communicates orally with individuals and groups, including public presentations; presents ideas in an organized, clear and concise manner, employs tact and discretion; listens well; offers appropriate feedback. | **4** |
| c. WRITTEN COMMUNICATION – Prepares organized, clear, concise, accurate and informative letters, memos, reports and other documents which effectively fulfill content and timeliness requirements. | **4** |
| d. COORDINATION/COLLABORATION – Works well with others at various levels; keeps information flowing to the appropriate parties vertically (down as well as up) and horizontally; facilitates communication and problem solving among parties when necessary. Works with governmental stakeholders to maintain high esteem and integrity for OPRA. | **4** |
| e. SUPERVISORY CONTROL – Effectively hires, assigns, directs, controls, evaluates performance, counsels and disciplines all other functions necessary or incidental to supervision; practices compliance with employment law guidelines and mandates. | **4** |
| 5 | **4** |

**COMMENTS FOR THE CATEGORY OF “INTERPERSONAL”:** There has been a lot of changes to the OPRA team since I have started. I have put a lot of thought into ensuring we get the right people for the right positions and thus far I think we have a good an cohesive team. The next challenge is filling the Residential Resources role and reorganizing the duties of the team in preparation for Anita’s departure.

**3. INDIVIDUAL**

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| PERFORMANCE FACTOR | PERFORMANCE RANK |
| a. EFFORT AND INITIATIVE – Requires little work direction; exhibits persistence and initiative; puts forth consistent, energetic effort; assumes full and complete responsibility for accomplishment of OPRA’s functions. | 4 |
| b. PROFESSIONAL/TECHNICAL COMPETENCE: Realistic knowledge and competence of the field and applies up-to-date technical/professional principles, practices and standards appropriate to the strategic focus areas of OPRA; acts as a resource person upon whom others can draw; professional demeanor maintained on a consistent basis. | 3 |
| c. INNOVATION – Displays original and novel though in creative efforts to improve on the status quo. Generates creative solutions to work problems and responsibilities, takes appropriate risk-taking actions to introduce and encourage innovative approaches. | 4 |
| d. OBJECTIVITY – Assesses issues, problems and decision situations based on the merits of the case presented; personal loyalties and biases do not unduly influence decisions; human resource decisions made on the basis of equal opportunity and objective job-related criteria. | 4 |
| e. CREDIBILITY – Through successful performance, instills the feeling of trust and dependability. | 4 |
| f. FLEXIBILITY – Adapts well to change, both internally and externally. Is open to change and adjusts well to new requirements of the job and changes in external environment, staff, and the organization. Maintains patience, confidence, and composure under pressure. Is open to different ideas, styles and approaches to job duties. | 5 |

**COMMENTS FOR THE CATEGORY OF “INDIVIDUAL”:** In relation to section (b.), my role with OPRA is definitely a work in progress. Our complex system challenges me to stay current and well-informed while also adequately addressing our members’ needs. I believe I am generally a good resource for people and will continue to strive to expand my base of knowledge .

**4. LEADERSHIP**

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| PERFORMANCE FACTOR | PERFORMANCE RANK |
| a.COACHING – Communicates a positive attitude; serves as a catalyst for action and encourages staff to try new things and to take calculated risks; provides honest feedback; minimizes tension and defensiveness; creates an environment for success; teaches and guides staff. | 4 |
| b. EMPOWERING – Creates an awareness in others of the powers and self-worth; involves others and shares powers in planning and decision-making; fosters leadership in others; challenges others to assume leadership roles and provides support by allowing them to risk, fail and learn; creates an environment in which others feel ownership for results and feel comfortable to take action to achieve desired results. | 4 |
| c. MODELING – Believes in public service; treats all with respect and dignity and creates an atmosphere of mutual respect and trust. Serves as a catalyst for action and is a team player; believes in oneself and looks at problems as opportunities; uses powers in a positive way; accepts responsibility for mistakes; insists on excellence (not perfection); adapts to changes as conditions and situations warrant. | 5 |
| d. TEAM BUILDING – Builds group cohesiveness and pride; encourages cooperation; fosters and practices good communication; recognizes and rewards individuals and team accomplishments and contributions; shares success and rewards; manages conflict; fosters and atmosphere of cooperation among OPRA staff. Is open to different ideas, styles, and approaches to job duties, development and implementation. Practices the team concept through active participation as a team member. Willing to assist others. | 4 |
| e. VISIONING – Establishes and articulates a vision of what could be; looks to and plans for the future; accepts new challenges; keeps an open mind. | 4 |
| f. SELF-DEVELOPMENT – Is not static; prepares for the future; has the courage to identify and address shortcomings; is committed to self-improvement; manages personal stress in positive ways. | 4 |
| g. SYSTEM LEADERSHIP – Participates in local, state and federal groups external to OPRA in order to advance the OPRA mission. | 3 |

**COMMENTS FOR THE CATEGORY OF “LEADERSHIP”:** I believe I am strong in this area but I want to continue to strive to be better. I specifically want to work on “Self-Development”, I believe I do well with addressing shortcomings and managing stress but would like to make connections with mentors and learning opportunities that will help me grow personally and professionally. I have been told by many people that I am “the right person, in the right position and for the right time in our history.” I strive to live up to that idea but I know there is more work to be done to establish myself as not only a leader in our field but as a leader who can take our field to a new and better place for people with developmental disabilities and those who support them. Being a leader is one thing, actually leading in a new direction is the true test. I do believe I could be one of those people that can help advance our system, but I think system change is a team sport. I have worked to get people away from talking about the problems (which will continue to be a problem) to actually trying to solve them and this will continue to be a challenge. I am working on the confidence to not whisper these ideas but share them more broadly and boldly.

**OVERALL EVALUATION (Please check one.)**

**\_\_\_\_\_ Outstanding**

**\_\_\_X\_\_Significantly exceeds expectations**

**\_\_\_\_\_Fully capable**

**\_\_\_\_\_Needs improvement**

**\_\_\_\_\_Unsatisfactory**

**What were your performance highlights in the past year?**

I came into OPRA after the departure of a long-time leader and there were high expectations to make some personnel changes, bring a different energy than the previous leader, and take serious steps to address the problems that come with our system. I believe, for the most part, I have lived up to those expectations. Then Covid-19 hit. It has been challenging beyond my wildest expectations, but I believe the OPRA team brought AIR (Advocacy, Information and Resources) to the situation. We also worked to make some sense of it all by breaking the situation down into phases and bring calm to the situation during our interactions with members. We have improved how we communicate with our members via the Friday 5 call and weekly publication. I wanted to bring honest conversation and transparency to OPRA, especially between me and the Board and I think we are off to a good start.

**What could have been most improved regarding your performance in the past year?**

I have been working on ways to effectively use our support staff to help me stay organized and complete tasks that would free up my time. I am doing better with this but there are more areas where they can help me. I want to continue to find ways to be more active with ANCOR. Early in my tenure I intentionally did not put a lot of energy into ANCOR so I could focus on member relationships, but now I would like to expand my involvement and find ways to use them as a resource and offering myself as a resource for them. I am continuing to build my skills in building legislative relationships.

**What should be your performance goals for the next year?**

1. **Solidify the Guiding Principles into a cohesive and actionable strategic plan.**
2. **Identify action steps related to the Guiding Principles and follow-through on those items.**
3. **Continue to meet with providers to stay in touch with the reality of the work.**
4. **Work with Mike Toman to mentor me to improve my legislative outreach/relationship skills.**
5. **Continue to develop a comprehensive and strategic vision and plan for providers addressing system reform and simplification, provider rates and workforce strategies.**
6. **Continue to develop the OPRA team to improve the member/customer experience.**
7. **Develop a plan to recruit new members to OPRA.**

Signature of President \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date\_\_\_\_\_\_\_\_\_\_\_\_