

Office of the State Treasurer
2016-2017 Performance Plans Progress Report

Evaluation Type:	Mid-Year Review As of: 3/30/2017
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OST

#	Percentage of Completion			
	<25%	26%-50%	51%-75%	>76%

Performance Ratings					
D	EE	ME	NI	U	Total

Goals

Near-Term
% of Total

121	34	28	14	45
100%	28%	23%	12%	37%

0	1	96	16	8	121
0%	1%	79%	13%	7%	100%

Full Year
% of Total

82	42	23	4	13
100%	51%	28%	5%	16%

0	0	66	5	11	82
0%	0%	80%	6%	13%	100%

Areas of Development

Near-Term
% of Total

54	8	36	10	0
100%	15%	67%	19%	0%

0	1	39	9	5	54
0%	2%	72%	17%	9%	100%

Total

Goals & Areas of Development
% of Total

175	42	64	24	45
100%	24%	37%	14%	26%

0	2	135	25	13	175
0%	1%	77%	14%	7%	100%

Employee Avg.

10	2	4	1	3
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0	0	8	1	1	10
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Evaluation Criteria
Period: Mid-Year Review
Include Near Term Initiatives: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Include Full Year Initiatives: Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
Include Second Half Initiatives: Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>
Include Long Term Initiatives: Yes <input type="checkbox"/> No <input checked="" type="checkbox"/>

Evaluation Periods	
Periods	Mid-Year Review: Progress between Oct-Apr Periodic Review: Progress between Apr-Oct Full-Year Review: Progress between Oct-Sep
Near Term	Initiative should be completed by the mid-year review (in April).
Full Year	Initiative should be started or in process in the first half of the year and completed by the end of the year (between October and September).
Second Half	Initiative should be initiated and completed in the second half of the year (between April and September).
Long Term	Initiative should be started and in process during the year but not expected to be completed within the year.

Performance Ratings	
D Distinguished	Employee produces exceptional or commendable work in multiple responsibility areas on a consistent basis, and at least meets expectations in all other areas. Usually recognized by peers, internal and external leadership as a major contributor or expert in the field.
EE Exceeds Expectations	Employee exceeds standards set for one or more major responsibility areas and at least meets expectations in all other areas. May sometimes produce exceptional work in one or more areas.
ME Meets Expectations	Employee meets standards set for all major responsibility areas without notable exception; but may infrequently exceed or fail to meet standards in one or more major areas.
NI Needs Improvement	Employee fails to meet standards consistently in one or more areas of responsibility despite sometimes achieving or even exceeding standards in other areas. Opportunities for improvement have not been sufficiently met.
U Unsatisfactory	Performance in one or more major responsibility areas is chronically deficient. Employee has been unable or unwilling to meet minimally acceptable performance expectations in one or more areas despite being given opportunities to improve.