

ETF Secretary's Agency Oversight and Administration

1. Management of Operations

	Strongly Agree	Agree	Neutral*	Disagree	Strongly Disagree	I have not directly observed this behavior/task
1. Oversees budget, staff, and operating resources in a responsible manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Ensures compliance with federal/state laws, rules, contracts and policies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Submits reasonable budget requests that address important priorities/needs.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Makes thoughtful/appropriate decisions after gaining input and analyzing the facts.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Ensures operational consistency/stability through a qualified managerial team and consistently values their skills, knowledge, and contributions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Uses benchmark studies, surveys, and best practices to improve programs, processes, and service.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Establishes proper controls and security measures to meet ETF's mission/objectives.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Encourages the prudent use of technology.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Oversees and monitors ETF's business continuity/disaster recovery plans.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment (*If marking "Neutral", please indicate a reason why.)

2. Member/Employer Services

	Strongly Agree	Agree	Neutral*	Disagree	Strongly Disagree	I have not directly observed this behavior/task
1. Uses various methods/tools to inform members about potential/actual benefit changes (legislation, regulations, policies, etc.).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Ensures members receive accurate and professional responses to questions and information requests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Seeks partnerships with employers and a wide range of government organizations.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Demonstrates/encourages open communication with Wisconsin Retirement System state/local employers.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Solicits feedback from members/stakeholders on communication and service preferences.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment (*If marking "Neutral", please indicate a reason why.)

3. External Relations

	Strongly Agree	Agree	Neutral*	Disagree	Strongly Disagree	I have not directly observed this behavior/task
1. Maintains effective communication with external entities/stakeholders (Legislature, Governor's Office, State of Wisconsin Investment Board, government officials and the public).	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Maintains awareness of state/national influences and activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Works to enhance the agency's reputation and image.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Desires and seeks input from state/federal benefit associations and interest groups.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Understands and pursues a legislative program that protects members' legal benefit rights and benefit program stability.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Ensures legislative and regulatory activities are monitored and analyzed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Maintains effective media relations and serves as spokesperson, when appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Conveys the need for ongoing professional relationships with outside parties.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment (*If marking "Neutral", please indicate a reason why.)

4. Staff Development

	Strongly Agree	Agree	Neutral*	Disagree	Strongly Disagree	I have not directly observed this behavior/task
1. Attracts, retains, and motivates quality employees.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Creates an atmosphere that fosters teamwork, creativity, and participation.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Works to minimize turnover by maintaining staff satisfaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Encourages staff training/other programs to develop skill sets and provide for career advancement, within budget parameters.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Demonstrates a collaborative managerial style involving others in decision-making.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Identifies and understands issues and takes appropriate steps to resolve them.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Keep employees informed of key events or activities.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Addresses succession planning for key positions.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. Encourages workplace diversity and assures managerial compliance with human resources laws and policies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment (*If marking "Neutral", please indicate a reason why.)

5. Leadership

	Strongly Agree	Agree	Neutral*	Disagree	Strongly Disagree	I have not directly observed this behavior/task
1. Instills a sense of confidence and is viewed as a skilled and trusted leader.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. Uses strategic planning team approaches to set goals and prepare for the future.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Leads organization with a vision and provides clear direction to staff.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. Recognizes excellence in various ways and offers a supportive work environment.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Maintains awareness of employee benefit program trends and responds to change.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. Delegates authority/responsibility in an appropriate manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Invites and welcomes innovative ideas.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Acts in an open and ethical manner.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Comment (*If marking "Neutral", please indicate a reason why.)