

September 6, 2007

To: LCOG Executive Committee
From: George Kloeppe, Executive Director
Subject: Biennial Performance Review, 2007-2009 Goals

The agency's biennial Performance Review of the Executive Director is brought full-circle with this month's consideration of goals and areas of emphasis for the next two years. The Board of Directors received the Executive Summary of this year's "360 Degree Evaluation," along with the Executive Committee's recommendation, at its June meeting. I greatly appreciate the participation of Board members, staff and other stakeholders in the provision of thoughtful observations about my performance as your Executive Director. Also appreciated was your support for a compensation adjustment, approved by the Board in June.

Now, the task is to agree upon a manageable number of "areas of emphasis" and goals to which I will direct energies and which can be reviewed as part of the next Performance Review in 2009.

As expected, the data received from the "360 Degree" process was varied. In some cases, the views of respondents directly contradicted those of others with respect to my performance. That is quite natural. Each person's experience is unique, as are the expectations of individual staff and stakeholders. As I have reviewed the input received, I again found it useful to think about the data within the typology that I employed in my self-evaluation last May. I suggested then that there were three broad components to the Executive Director's job: managing the operation of the agency; setting the tone and expectations for the organization's activities; and communicating with and between the community, the membership and the staff. My sense is that there is room for improvement in each of these areas. I will suggest specific tasks that seem appropriate within these three components of the Executive Director's job. But first, let me offer the "big picture" response to what I saw in the data. If consistent with the thinking of the Executive Committee, my progress (or lack thereof) over this review period in support of these subjective values should be a part of the next review of my performance.

Areas of Emphasis

At the next Performance Review, I would suggest that the Executive Committee and Board particularly consider the outcomes of my work in the following—admittedly over-lapping—areas:

- The degree to which I have enhanced or intensified my communication (about the organization and regional cooperation) with member governments, the staff and the broader community.
- The degree to which I have increased and enhanced my accessibility and visibility to the staff and member governments.
- The degree to which I have proactively portrayed the vision and benefits of regional cooperation, collaboration, and planning to the membership, staff and broader community.

The fact that neither the Executive Committee nor I will be able to confidently measure progress toward these subjective areas of emphasis should not diminish their importance nor preclude their consideration. However, against the backdrop of the three items above, several only-slightly more measurable goals can be listed. The Performance Review data and my own sense of where priorities need to be assigned suggest some specific items for the “To-Do List” in the coming months. A Review in 2009 should assess the outcomes of my efforts in these areas.

Managing the organization...

1. Provide leadership in the arena of facilities management. At this writing, Board authorization has been given to pursue the acquisition of an office building in downtown Eugene. Steps are being taken in pursuit of that directive, and the end result is unknown. However, if a building purchase is approved and consummated, substantial work related to financing, renovation design, construction and relocation will demand attention. In addition, serious interest has been expressed by private interests in the purchase of LCOG’s office building in Springfield. That asset, while not presently used by our agency, is fully leased to the State of Oregon. Consequently, there are political issues involved that must be considered.
2. Whereas topics such as increased fiscal stability, HR leadership and recruiting/establishing a new SDS Director, topped my personnel management goals two years ago, the most current challenge lies in

providing appropriate leadership to the transportation and planning work groups.

3. Also a high priority goal will be supporting SDS management attending to work-load issues stemming from severely constrained financial support and growing case loads. Achievement of positive results in this area will have a bearing not only upon the staff but also upon the collective bargaining process with the SDS staff's representative next spring. While we are currently adding some FTEs to the staff, more will have to be done within the coming months.
4. I will need to continue work with the management team in providing the training and support needed by middle-level staff to assume increasingly responsible roles with the agency. Provide a "career path" and, to the extent possible, a succession plan to "grow" professionals to fill positions that will be vacated over the coming years.

Setting the tone...

5. Continue and increase the level of presence and active involvement with members of the staff—visibility and accessibility. Share key decision points related to the organization whenever possible. Share the purpose and values of the organization. The recently initiated new employee orientations and the supervisors' training sessions that have been started provide opportunities to address this goal. Likewise, staff- and management team meetings in both buildings should be venues to make more clear my expectations, as well as the "ethic of the organization." Increase coaching, training and mentoring of staff.
6. Similarly (in consideration of some of the Performance Review comments), increase the level of "risk-taking" and proactive policy guidance with the Board and Executive Committee. I can be more clear in my recommendations and their justification.
7. Externally, it falls to the Executive Director to preach the message of the "ethic and tangible benefits of cooperation" and to constantly encourage dialogue. I can ratchet up my efforts in this area.

Communication...

8. Increase my pursuit of opportunities to tell "LCOG's story" through formal presentations and in informal conversational settings.

9. Serve as a neutral convener of interested parties for the exploration of acceptable public policy directions.
10. As noted above, increase the level and intensity of communication with the staff, sharing agency vision, direction and key decisions of agency.

Some general thoughts about the Review process...

After its utilization in 2005 and again this year, I believe that the “360 Degree Evaluation” mechanism has value—both as a data collector for the Performance Review *and* as a welcomed opportunity for staff and stakeholders to communicate frankly and safely about their perceptions. As it elicited the involvement of 81 people this year, I would also say that it is a reasonably effective involvement tool. In a sense, the strength of the tool can also become a weakness. By intent and design, there is no attribution nor ownership of the points made. Neither the Committee nor I know where they are coming from. Contributions might be insightful or spiteful, true or false. The process simply lumps them together. This “weakness” has more applicability to the subjective comments than to the objective ratings. But all of the data received through this mechanism, taken together, creates a somewhat chaotic picture. For example:

*Provides clear and consistent leadership...needs more proactive leadership
Successfully led LCOG...Leadership seems to come from other managers
Clear about the direction of the agency...need to develop clearer vision
(Does not have) control of his troops...demonstrated effective leadership and knowledgeable...*

But the data collector does work, and the suggestions made to which I might be inclined to roll my eyes (e.g. *attend some of the city manager meetings; focus on better ties with the City Managers of Eugene and Springfield and Lane County Administrator*) really reflect an honest misunderstanding of what I do. And that is my responsibility to clarify.

On balance, it seems that the payoff is worth the biennial effort and expense. You, the members of the Executive Committee, however, will need to judge the value of the exercise. I appreciate the time and effort that has been applied to the Performance Review, and I will take to heart the guidance that the data provides.