



**City of Cincinnati Retirement System  
Performance Evaluation Committee**

**Agenda**

**April 8, 2021 / Noon – 1:00 P.M.  
City Hall, Council Chambers and via Zoom**

**Members**

Kathy Rahtz  
Tom Gamel  
John Juech  
Bill Moller  
Don Stiens  
Erica Winstead

**Administration**

Paula Tilsley  
Renee Kabin  
John Dietz  
Bev Nussman

**Call to Order**

**Approval of Minutes**

- ✚ Meeting Minutes - July 11, 2019 (filed due to change in members)

**New Business**

- ✚ Discussion of outstanding and new CRS initiatives

**Adjournment**

**Next Meeting: TBD**



**City of Cincinnati Retirement System  
Performance Evaluation Committee Minutes**

**July 11, 2019/1:30 P.M.  
City Hall, Committee Room B**

**Members**

Mark Berliant  
Bill Moller  
Tom Gamel  
Steven Dietrich  
Kathy Rahtz  
Don Stiens

**Administration**

Paula Tilsley  
Renee Tyree  
Peter Wilson  
Ann Schooley, City Solicitor's Office

**Absent:** M. Berliant

T. Gamel called the meeting to order at 1:40 p.m.

**APPROVAL OF MINUTES**

D. Stiens made a motion to approve minutes from June 6, 2019.  
S. Dietrich seconded the motion and the motion passed. Minutes were approved.

**UNFINISHED BUSINESS**

**Performance Goals for CRS Executive Director for Fiscal Year Ending June 30, 2020**

T. Gamel explained that the Committee previously developed final goals for fiscal year ended June 30, 2020 and the goals had been placed into the city's evaluation document template.

***Committee Action***

D. Stiens made a motion to accept the finalized goals and template. S. Dietrich seconded the motion and the motion passed. Finalized performance goals for the CRS Executive Director accepted.

Having no further business, D. Stiens made a motion to adjourn. T. Gamel seconded the motion and the motion passed. Meeting adjourned at 1:45 p.m.

**Next Meeting:** TBD

## **Cincinnati Retirement System Performance Initiatives**

Status of prior uncompleted and new initiatives as of March 2021

- 1. Initiative: Submit an RFP to the marketplace for a Fiduciary Audit, evaluate proposals, and present to the CRS Board of Trustees for selection.**

Progress: RFP was submitted by 12/31/19, responses were received 1<sup>st</sup> quarter 2020, project was indefinitely postponed by third parties due to the unexpected significant fee proposals.

- 2. Initiative: Perform a feasibility analysis on implementing an enterprise financial accounting software package to automate processes and increase efficiencies by 12/31/2019.**

Progress: The goal was initially delayed due to the departure of the prior Finance Manager. However, RFP was submitted to market by early December 2019, consultant was selected, and the project has moved beyond a feasibility study. Staff has identified, is currently testing, and is finalizing the implementation plans for a financial accounting software system.

Update 3/2021: CRS team and consultant are defining and establishing the multitude of accounts necessary to capture and report a more detailed analysis of CRS' financial operations. Progress is on track to start using both the current method and new method of reporting by summer 2021 to confirm the reconciliation of accounts, and to move completely to the new system January 1, 2022.

- 3. Initiative: Incorporate into PensionGold functionality and redesign retiree pension payroll advices to enhance readability and understanding of pay components, and to eliminate dependence on limited Standard Register software and Treasury for printing.**

Progress: This initiative was delayed due to staff resources needed to implement the Medicare Advantage Plan.

Update: CRS is currently on track to provide redesigned pension pay advices beginning with the July 1, 2021 pension payroll. Also, the pay advices will be printed by the City's printing services instead of the Finance Department's Treasury Division.

- 4. Initiative: Facilitate the resolution of and manage the implementation of the outstanding components of the Collaborative Settlement Agreement.**

Progress: Continued to work with City Administration and legal counsel as requested.

- 5. Initiative: Work with the Board to complete an asset/liability study.**

Progress: The Board delayed the study in 2018 and 2019. It was further delayed in 2020 due to the extreme market volatility and uncertainty of the pandemic.

Update: The CRS actuary, Cheiron, was informed to proceed in early 2021 and Cheiron plans to present the study to the Board in July 2021.

6. **Initiative: Provide access to the CRS online portal called MemberDirect for retirees, providing access to pay advices, 1099's, benefits applicable to the member based on their Group, named beneficiaries, etc.**

Progress: Completion is anticipated by the end of the 1<sup>st</sup> quarter in 2022.



# Annual Performance Evaluation

For Middle Management (Div. 0), Senior Management (Div. 8), Executive Management (Div. 5), and Cincinnati Organized and Dedicated Employees (CODE).

## General Information

Employee Name: \_\_\_\_\_ Employee ID #: \_\_\_\_\_  
Department: \_\_\_\_\_ Division: \_\_\_\_\_  
Employee's Job Classification: \_\_\_\_\_  
Review Period: From: \_\_\_\_\_ To: \_\_\_\_\_  
Effective Date of Review: \_\_\_\_\_ Next Review Date: \_\_\_\_\_  
Rater's Name: \_\_\_\_\_ Reviewer's Name: \_\_\_\_\_  
Rater's ID: \_\_\_\_\_ Reviewer's ID #: \_\_\_\_\_  
Type of Review: Annual

## Introduction & Purpose

### For the Rater / Supervisor:

The performance evaluation is a tool to measure, evaluate, reinforce and/or improve your employee's job performance. After completion of the Performance Evaluation, your employee should understand if they have been successful in meeting their goals & objectives for the review period. It is also a tool to measure the degree to which your employee has embraced the values of your Department and the City of Cincinnati. It is best if you give your employee on-going feedback throughout the year.

### For the Employee:

The performance evaluation provides feedback concerning a) your supervisor's expectations and priorities of your current position; b) your performance strengths and areas where there is room for improvement; and c) the degree to which you have met your goals & objectives.

## Definition and Point Value of Performance Ratings

The rater must provide comments for each measurement when completing the evaluation.

### Performance Ratings:

**Exceptional:** Employee consistently surpassed expectations, did more than required, and exceeded requirements and goals / objectives. **4 points**

**Exceeds Expectations:** The employee met expectations and often rose above expected standards and performance requirements for position held. Did more than required on an ongoing basis. **3 points**

**Meets Expectations:** Performance was competent. Achieved results that met requirements or goals / objectives. Performance was at the level expected of a qualified and experienced employee, although there may be opportunities for improvement. **2 points**

**Needs Improvement:** Performance fell short of consistently meeting requirements. Needed counseling by supervisor. Needs improvement in area to more effectively and efficiently meet requirements of the position. **1 point**

**Unacceptable:** Deficient performance in meeting requirements. Needs counseling and oversight by supervisor on an on-going basis. Immediate, substantial and sustained improvement is required. **0 points**

These performance ratings are used for individual measurements, sections, and the overall rating.

## Essential Values

Rater must provide comments for each measurement when completing the evaluation.

- Acts with Integrity, Ethics & Accountability:** Is perceived as trustworthy. Assumes responsibility for actions and follows through on commitments.. Serves as role model and “walks the talk”. Conducts self in a professional manner. Understands the responsibility of being a public servant. Makes decisions in a consistent manner. Maintains confidentiality. Shows compassion for others. Gives honest feedback.  
**Rating:**  
Comments and / or Examples:
- Communicates Effectively:** Demonstrates effective and tactful listening, speaking, and writing skills with all levels of the City Administration. Skilled at interacting with people who have different communication styles. Openly shares appropriate information. Understands and can articulate the Department’s mission. Keeps supervisor aware of progress and communicates potential roadblocks and information that could impact public opinion.  
**Rating:**  
Comments and / or Examples:
- Provides Excellent Customer Service:** Understands and embraces that the City’s primary mission is to deliver excellent customer service. Responds in a timely and effective manner to both internal and external customer’s needs and does so courteously. Looks for creative solutions to better serve our customer, and shares best practices.

**Rating:**

Comments and / or Examples:

4. **Relationship Building:** Seeks, builds, and maintains productive relationships with employees at all levels, and with customers (both internal and external). Works courteously and cooperatively with other team members and the public. Seeks opportunities to assist others. Treats all people respectfully.

**Rating:**

Comments and / or Examples:

5. **Embraces Change:** Accepts and promotes new systems, processes, and procedures, and looks for opportunities to improve upon them. Understands the need for change and growth. Seeks to minimize bureaucratic inefficiencies.

**Rating:**

Comments and / or Examples:

6. **Attitude:** Demonstrates a positive and cooperative attitude and willingness to follow instructions. Shows initiative. Contributes to unit morale and shows acceptance of Department goals. Considers the needs of the organization and others when solving problems and exercising judgment. Extends common-courtesy to others. Is supportive of, and gives credit to, others.

**Rating:**

Comments and / or Examples:

**Section rating for Essential Values:**

**Rating:**

Comments:

Previous Rating:

**Strategic Initiatives**

The Supervisor selects the Competencies and Goals, with input from the employee. You may also reference the Job Specifications for the position.

The Rater (Board of Trustees) must provide comments for each measurement and should use quantifiable results and specific examples when practical.

1. Submit an RFP to the marketplace for a Fiduciary Audit, evaluate proposals and present to the Board of Trustees for selection by September 30, 2019.

**Rating:**

Comments and / or Examples:

2. Perform a feasibility analysis of implementing an enterprise financial accounting software package to automate processes and increase efficiencies by August 31, 2019.

**Rating:**

Comments and/or quantifiable results:

3. Work with the Board to complete an asset liability study by June 30, 2020.

**Rating:**

Comments and/or quantifiable results:

4. Incorporate healthcare eligibility rules into PensionGold functionality to automate an otherwise complex decision matrix, due June 30, 2020.

**Rating:**

Comments and / or Quantifiable Results:

5. Incorporate into PensionGold functionality and redesign pension advices to enhance readability and understanding of pay components, and to eliminate dependence on limited Standard Register software and Treasury (for printing) by June 30, 2020.

**Rating:**

Comments and/or quantifiable Results:

6. Replace outdated IT hardware and upgrade software across all CRS desktops by 6/30/2020.

**Rating:**

Comments and / or Quantifiable Results:

7. Facilitate the resolution of and manage the implementation of the outstanding components of the Callaborative Settlement Agreement.

**Rating:**

Comments and / or Quantifiable Results:

8. Develop a plan for the analysis of customer service best practices.

**Rating:**

Comments and / or Quantifiable Results:

8. **Strategic Initiative:**

**Goal(s):**

**Rating:**

Comments and / or Quantifiable Results:

**Section rating for Strategic Initiatives:**

**Rating:**

Comments:

Previous Rating:

**Supervisory / Leadership Skills**

(Applicable to supervisory personnel)

**Rater must provide comments for each measurement when completing the evaluation.**

1. Provides Leadership, Trains, Motivates, and Coaches. Is a Role Model to Team Members, Fosters Teamwork, Provides an Environment for Open and Shared Ideas

**Rating:**

Comments and / or Examples:

2. Consistently Upholds Standards Fairly, Resolves Problems, Conflicts, and/or Grievances in an Appropriate and Timely Fashion, (i.e.; HR P&P, Labor contracts.), Makes Fair and Consistent Decisions, Maintains Environment for Positive Employee Morale

**Rating:**



Comments and / or Examples:

3. Plans and Acts Strategically, Delegates Effectively, Promotes Cross Training and Shared Responsibilities.

**Rating:**

Comments and / or Examples:

4. Promotes, embraces, and values Small Business Enterprise (SBE) initiatives, EEO, and Affirmative Action goals. Implements a strategy to increase the number of competitively bid contracts awarded to SBE's. Attains the departmental SBE utilization goal of

**Rating:** NOT APPLICABLE

Comments and / or Examples:

5. Completes Employees' Performance Evaluations on Time

**Rating:** NOT APPLICABLE

Comments and / or Examples:

**Section rating for Supervisory / Leadership Skills:**

**Rating:**

Last Year's Rating:

Comments:

**Overall Evaluation**

**Rating:**

Previous Rating:

Supervisor's Specific Comments to Support Overall Evaluation:

Rater / Supervisor's  
Name:

Date:

ID #:

Supervisor's Signature: \_

Reviewer's Name:

Date:

ID #:

Reviewer's Signature: \_

I understand that my signature indicates that I have had the opportunity to review and discuss the completed performance evaluation with my supervisor, but does not necessarily mean that I agree with the performance evaluation.

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Employee's Signature

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Date

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ID #

Employee comments (Optional):

**Reviewer's Comments (Optional)**

Reviewer's Comments:

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Signature of Reviewer

---

Date of review

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Reviewer's ID