



City of Tacoma

Performance Evaluation

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Performance Period: August, 2018 to July, 2019

Evaluators: Tacoma Public Utility Board—Karen Larkin, Bryan Flint, Mark Patterson, Christine Cooley

Date: July 24, 2019

Mission, Values, and City Strategic Goals

Our Mission

Tacoma Public Utilities provides services that are vital to our quality of life.

Our Values

- **Serving our customers**
- **Respecting people**
- **Caring for our community and the environment**
- **Achieving excellence**
- **Operating safely**

Tacoma 2025 Goals



Education

Ensure that Tacoma has talented and educated citizens with opportunities for lifelong learning.



Equity & Accessibility

Ensure access, availability, and equitable distribution of resources to citizens.



Livability

Ensure high-quality neighborhoods that are thriving and connected throughout the city.



Economy & Workforce

Ensure a strong economy that provides growth and attracts and retains talent and opportunities.



Civic Engagement

Ensure meaningful opportunities for community engagement and leadership for all Tacoma citizens.

2019/2020 Public Utility Board Priorities

To be developed in collaboration with PUB as Strategic Directives are developed.

Ratings Definitions

Exceptional Performance: Demonstrates particularly excellent sustained performance of such high quality that it results in meeting organizational goals that would not otherwise have been achieved. Exerts a significant positive influence toward organizational growth. Demonstrates the performance characteristics outlined in the "Exceeds Expectations" and "Effective" categories.

Exceeds Expectations: Demonstrates unusually good performance that exceeds expectations in critical areas. Exhibits sustained support of organizational goals. Improves the quality and/or cost effectiveness of management practices, operating procedures, task assignments and/or program activities. Effectively handles difficult and unpredicted and/or unprecedented problems.

Achieves Expectations: Demonstrates good, sound performance that meets organizational goals. Completes critical activities in an effective manner. Applies technical skills and organizational knowledge to successfully carry out assigned duties. Plans and performs work according to organizational priorities and schedules. Communicates clearly and effectively.

Requires Development: Performance is deficient in one or more key areas and will require additional training or assistance to fully achieve expectations.

Unsatisfactory: Shows a lack of awareness of or regard for policy implications or assignments. Circumvents established procedures, resulting in unnecessary expenditure of time or resources. Reluctance to accept responsibility. Performance failed to meet expectations in essential areas of responsibility and/or critical goals were not met. Work is behind schedule and/or of poor quality.

Tacoma 2025 Focus Area: Government Performance

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Resilience



Strategic Direction	Strategies
<p>Tacoma Public Utilities is a safe place for employees to work. TPU is prepared to handle emergencies due to catastrophic events.</p>	<ol style="list-style-type: none"> 1. Coordinate with General Government to develop safety organization structure that connects efforts at General Government with efforts at TPU. <i>Framework definition by July 1; Organization-wide structure active and functioning by December 31.</i> 2. Enhance TPU wide safety culture <ol style="list-style-type: none"> a. 95% of all managers and supervisors of high risk exposure employees complete Supervisor Training in Accountability & Recognition Techniques (S.T.A.R.T) by <i>July 1.</i> b. 90% of high risk exposure TPU employees (currently 670 total) scheduled for training complete the Safety Culture Excellence Workshop training by <i>December 31.</i> c. Establish a formal TPU Safety Communication Plan for the 2019 Safety Objectives by the end of <i>July 1.</i> d. Approve sustainability plan for long term continuity of Safety Culture training by the <i>December 31.</i> e. Implement two new leading indicators to improve safety performance. Each division will document a process and begin reporting on 1) Senior Leadership visits and 2) Corrective Actions status and completion by <i>December 31.</i> 3. Identify and pursue two high priority initiatives that will enhance comprehensive TPU emergency response capabilities by <i>December 31.</i>

Tacoma 2025 Focus Area: Government Performance
 Public Utility Board Priority: *pending PUB Strategic Directive work*
 TPU Director Focus Area: Resilience



Strategic Direction	Strategies	Activities	Performance
Tacoma Public Utilities uses technology to improve services and keep utility rates low.	1. Assist Policy Makers in developing and executing strategic direction for Click Network! <i>by December 31</i> <ul style="list-style-type: none"> • Implement strategies to maintain customer base during transition. • Develop governance structure. • Manage workforce transition. 		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Oversee preparation work, including customer outreach, necessary to begin meter deployment in 2020 for the AMI (Advanced Metering Infrastructure) project.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Identify priority strategies from the Digital Transformation Roadmap for implementation with particular focus on customer facing initiatives <i>by December 31</i> .		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Equity & Accessibility

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Equitable Access



Strategic Direction	Strategies	Activities	Performance
Tacoma Public Utilities is recognized as an exceptional organization in the areas of equity and accessibility.	1. Budget for satellite OEHR office at TPU <i>by January 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Coordinate with general government on the hiring of lead OEHR/TPU employee <i>by January 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Support development and implementation of OEHR satellite office at TPU: a. At least 25% of TPU staff will complete Equity 101 Training <i>by December 31</i> , including all Executives and their Senior Leaders. b. Establish a committee of TPU employees that will coordinate with the Office of Equity and Human Rights, report to the Executive Leadership Team, <i>by July 1.</i> c. Coordinate with TPU/OEHR committee in development of a TPU Equity and Empowerment Strategic Action Plan <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Equity & Accessibility

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Equitable Access



	d. Identify strategies to review equity in customer program participation by December 31.		
	4. Develop overarching objectives for diversity and inclusion in OEHR/TPU strategic plan (1c) including key areas of focus by December 31.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	5. Increase BCAP to either \$1,000,000 in bill assistance or 2,000 households participating by December 31, 2020.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	6. Support implementation of the Workforce Connect project and associated organizational change management.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	7. Raise senior leader awareness of customer circumstance with respect to income constraints by conducting a poverty simulator by October 31.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Economy and Workforce

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Economic Development



Strategic Direction	Strategies	Activities	Performance
TPU is an innovative regional partner, engaged with the communities it serves.	1. Examine policy and procedure and identify potential modifications to reduce barriers to economic development and redevelopment opportunities important to City of Tacoma and franchise cities <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Collaborate with anchor education institutions to identify strategies to build workforce K to career talent pipeline. Initiate action to implement two strategies <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Evaluate and identify TPU wide intern programs (including Veteran VIP) and identify strategies to enhance intern experience and connect hiring strategies to overall K to career talent pipeline <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	4. Formalize stakeholder engagement framework necessary to guide TPU outreach and inform the Board regarding policies, strategic direction, or projects <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Livability

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Environmental Stewardship



Strategic Direction	Strategies	2019 Activities	Performance
TPU desires to be a leader in environmental stewardship working to mitigate impacts and promote strategies that enhance the livability of the communities it serves.	1. Develop and implement community outreach plan related to Environmental Action Plan initiatives completed <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Identify opportunities to participate in local (City of Tacoma and franchise city) events to raise awareness about energy and water conservation programs <i>by July 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Identify three key transportation decarbonization strategies <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Government Performance
 Public Utility Board Priority: *pending PUB Strategic Directive work*
 TPU Director Focus Area: Collaboration



Strategic Direction	Strategies	Activities	Performance
TPU is a high performing organization with clearly articulated Board governance processes and Director performance expectations.	1. Continue to build and enhance positive working and collaborative relationship with Public Utility Board.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Map out development process for Principles of Board Governance in key areas and identify existing policies and/or resolutions germane to the process <i>by July 1</i> .		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Develop 6 Strategic Directive policies for Board Approval <i>by December 31</i> .		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Government Performance
 Public Utility Board Priority: *pending PUB Strategic Directive work*
 TPU Director Focus Area: Collaboration



Strategic Direction	Strategies	Activities	Performance
TPU is a fiscally responsible organization.	1. Develop, present, and gain approval of FY19/20 biennium budget and rates in comprehensive process involving the Board and City Council <i>by January 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Present FY19/20 biennium budget and rates to community including franchise cities through an expansive and extensive outreach process <i>by January 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Identify strategies to keep rates low and prioritize initiatives to pursue and track success <i>by December 31.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	4. Maintain competitive rates for utility services.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

Tacoma 2025 Focus Area: Government Performance
 Public Utility Board Priority: *pending PUB Strategic Directive work*
 TPU Director Focus Area: Collaboration



Strategic Direction	Strategies	Activities	Performance
The workplace culture at TPU is engaging, collaborative, and supportive.	1. Conduct extensive community outreach and stakeholder engagement in first 100 days of employment.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	2. Identify strategic areas of focus to support City's Vision 2025 <i>by January 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	3. Identify specific actions for each strategic area of focus and an action plan to pursue initiatives <i>by July 1.</i>		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	4. Continue to build and enhance the positive working and collaborative relationship with the Mayor, City Council Members, and the City Manager.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	5. Work with City Manager to ensure efficient and effective utilization of shared and/or complementary City resources and services in accordance with Prop 3.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	6. Participate in General Government Compensation and Classification Study.		Exceptional performance Exceeds expectations

Tacoma 2025 Focus Area: Government Performance

Public Utility Board Priority: *pending PUB Strategic Directive work*

TPU Director Focus Area: Collaboration



			Achieves expectations Requires development Unsatisfactory
	7. Participate in City’s Workforce Equity Study specific to TPU.		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	8. Implement strategies to address key findings from the employee survey. a. Select one priority initiative from the survey results and develop improvement plan for TPU-wide deployment <i>by July 1</i> . b. Set priorities for year two LEAD training focused on behaviors that reflect needs identified by survey results <i>by February 1</i> . c. 100% of managers and supervisors in such roles for 12 months in 2019 complete LEAD year two training <i>by December 31</i> .		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory
	9. Analyze organizational structure around organizational efficiency and span of control. Determine where opportunities exist and develop a plan to address priority items <i>by December 31</i> .		Exceptional performance Exceeds expectations Achieves expectations Requires development Unsatisfactory

TPU Director Competencies and Professional Development

Competency	Definition	Activities	Performance
Business insight	Applying knowledge of business and the marketplace to advance the organization’s goals		Role model Fully competent Needs improvement
Cultivates innovation	Creating new and better ways for the organization to be successful		Role model Fully competent Needs improvement
Strategic mindset	Seeing ahead to future possibilities and translating them into breakthrough strategies		Role model Fully competent Needs improvement
Collaborates	Building partnerships and working collaboratively with others to meet shared objectives		Role model Fully competent Needs improvement
Manages conflict	Handling conflict situations effectively, with a minimum of noise		Role model Fully competent Needs improvement
Interpersonal savvy	Relating openly and comfortably with diverse groups of people		Role model Fully competent Needs improvement
Communicates effectively	Developing and delivering multi-mode communications that convey a clear understanding of the		Role model Fully competent Needs improvement

TPU Director Competencies and Professional Development

	unique needs of different audiences		
Drives vision and purpose	Painting a compelling picture of the vision and strategy that motivates others to action		Role model Fully competent Needs improvement
Courage	Stepping up to address difficult issues, saying what needs to be said		Role model Fully competent Needs improvement
Instills trust	Gaining the confidence and trust of others through honesty, integrity, and authenticity		Role model Fully competent Needs improvement

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TPU Director Competencies and Professional Development

The best signs of growth I could show this year are:

Personal Growth Goals	Specific Actions to Meet Goals
1.	
2.	

In order to be successful, I need the following:

Skills/Training	Professional Development Opportunities	Support from Utility Board
•	•	•

Overall Rating and Comments

(Select one that reflects performance on goals and competencies)

Exceptional performance

Exceeds expectations

Achieves expectations

Requires development

Unsatisfactory

Comments