

16 CONFIDENTIAL ITEMS

16.1 REVIEW OF CEO PERFORMANCE DURING PROBATION

Responsible officer: Peter Bond, Peter Bond Consulting

Attachments:

Survey Report CEO probationary performance review proposal from Peter Bond Consulting

Executive summary

The purpose of this report is to enable Council to consider a final report on the CEO Performance Review Panel's recommendations in relation to the CEO's probationary period review.

The Council established a Performance Review Panel by way of resolution on Wednesday 21st November 2018 made up of the Mayor, Deputy Mayor and Cr Jeffrey Nickolls. The role of the CEO Performance Review Panel is to oversee the process of the CEO's probationary period performance review and to report back to Council.

The Performance Review Panel has worked with the consultant to prepare for, and conduct, the performance review of the CEO. This process has required the following activities:

- The Chief Executive Officer completed a self-assessment of performance during the Probationary Period against the KPI's outlined in the CEO's Contract of Employment using the rating system from Schedule 3 of that contract. The CEO delivered a presentation to the Performance Review Panel on 11th December 2018.
- A 360-degree survey of Elected Members, an agreed sample of staff and stakeholders, has been facilitated by the consultant to measure satisfaction with the Chief Executive Officer's performance.
- The Consultant has prepared a report based on the consolidation of all the information provided by the Chief Executive Officer, Council Members, the CEO's Direct Reports and External Stakeholders by way of the survey. A copy of that report is provided attached.
- The Consultant has met with the CEO Review Panel on 11th December 2018 and 3rd January 2019 to discuss the appraisal process draft Probationary Review Report which captures the outcomes of the 360-survey process.
- The final report is produced and presented to Council at their Ordinary meeting scheduled for 16th January 2019 for adoption, which becomes the official record of the review.

At the meeting of the Performance Review Panel held on 3rd January 2019, there was a shared view by panel members that the CEO has performed well against all of the key performance indicators and it is recommended by the CEO Performance Review Panel that his ongoing employment be endorsed.

Background

The CEO, Jason Taylor, entered into a contract with Southern Mallee District Council (SMDC) and commenced employment on 19th July 2018. The contract has a term of 3-years with the potential for a one-year extension.

119

The CEO's Contract of Employment stipulates that the appointment of the Chief Executive Officer is subject to his satisfactory performance during the first five calendar months from the commencement date.

Such performance is to be assessed based on a facilitated 360-degree review of Elected Members, an agreed sample of staff and stakeholders, to be undertaken in confidence commencing at 4 months from commencement to measure satisfaction with the Chief Executive Officer's performance.

Council has sought assistance of Peter Bond Consulting to:

- Undertake a review of the CEO's performance over the 5-month probationary period for the period 19 July 2018 to 18 December 2018 in line with the CEO's defined KPI's and via a survey of all elected members, staff and key stakeholders nominated by the Performance Review Panel and agreed by the CEO. This review period has been extended by one month by agreement with the CEO;
- Meet with the CEO and the Panel to communicate the results of the performance survey;
- Assist the Panel with any revisions required of the Key Performance Indicators for the period 19 December 2018 to 18 July 2019;
- Prepare and present a draft report to the Panel for its consideration;
- Prepare a final report to Council on the Panel's recommendations in relation to the CEO's probationary period review.

Context

The CEO's contract includes the following clause relating to the probationary period:

Probation Period

- a) It is agreed that the appointment of the Chief Executive Officer is subject to the Chief Executive Officer's satisfactory performance during the first 5 calendar months from the Commencement Date with a facilitated 360-degree review of Elected Members, an agreed sample of staff and stakeholders, to be undertaken in confidence at 4 months to measure satisfaction with the Chief Executive Officer's performance. The 5 calendar months being the Probationary Period. During the Probationary Period, the following will occur:*
- i. the Chief Executive Officer will meet, on a monthly basis, with the Mayor and Deputy Mayor of the Council for a discussion of his performance;*
 - ii. a written record will be kept of these discussions, and "signed off" as a true record by the Chief Executive Officer, Mayor and Deputy Mayor;*
 - iii. if, during any of these monthly meetings, performance problems are raised, these will be recorded, and noted for review at the next monthly meeting; and*
 - iv. if a problem identified at the previous monthly meeting remains a problem at the next meeting, then either party may terminate this Agreement by providing 4 weeks' written notice to the other party;*
 - v. further and in addition to clause 3 (a)(iv), the Council may following the review at 4 months if satisfied that a satisfactory level of performance has not been achieved terminate this Agreement by giving 8 weeks' notice to the Chief Executive Officer;*

- vi. *following satisfactory completion of the Probationary Period the Chief Executive Officer's contract will be formally confirmed.*

Policy and statutory Implications

The Local Government Act 1999, Chapter 7, deals with requirements related to the CEO.

Issues

The CEO concluded 4 months of employment on 19 November 2018 and the contract provides that the 5-month probation period concluded on 19 December 2018. The CEO has indicated a willingness to extend the probationary period and has been extended by mutual agreement with the CEO by one calendar month to 19th January 2019 to enable additional time for the review of his performance, reporting back to Council and for a Council decision at their January meeting scheduled for 16th January 2019.

Financial implications

There is a cost associated with engaging a firm to undertake a review of the CEO's performance during the probationary period.

Work health and safety implications

There are no work health and safety implications for this item.

Consultation

The CEO, Mayor and Deputy Mayor have continued to meet during the probationary period to discuss the CEO's performance and a record of these discussions has been kept.

The CEO's Probationary Period Performance Review process has been carried out in full consultation with the CEO Performance Review Panel as appointed by Council

Council engaged the services of Peter Bond Consulting to facilitate the process through a 360-degree review of elected members and an agreed sample of staff and stakeholders, to measure satisfaction with the CEO's performance, and to provide a report back to the CEO performance review panel and Council.

RECOMMENDATION

That under the provisions of Section 90 (2) of the Local Government Act 1999 the Council orders that the public be excluded from attendance at the meeting with the exception of Jason Taylor (Chief Executive Officer, Peter Bond (Peter Bond Consulting) and Shona Hyde (Minute Secretary), in order to consider, in confidence, matters on the grounds of Section 90 (3);

- (a) information the disclosure of which would involve the unreasonable disclosure of information concerning the personal affairs of any person (living or dead),**

The Council is satisfied that the principle that the meeting be conducted in a place open to the public has been outweighed in the circumstances because of information that has been provided previously to the Council under Section 90 of the Local Government Act and retained under Section 91 of the Local Government Act.

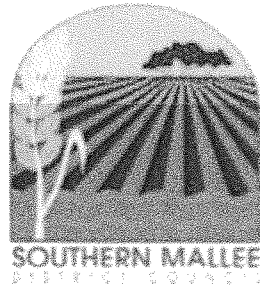
**MOVED COUNCILLOR NEVILLE PFEIFFER
SECONDED COUNCILLOR REBECCA BOSELEY**

That under the provisions of Section 90 (2) of the Local Government Act 1999 the Council orders that the public be excluded from attendance at the meeting with the exception of Jason Taylor (Chief Executive Officer, Peter Bond (Peter Bond Consulting) and Shona Hyde (Minute Secretary), in order to consider, in confidence, matters on the grounds of Section 90 (3);

- (a) information the disclosure of which would involve the unreasonable disclosure of information concerning the personal affairs of any person (living or dead),

The Council is satisfied that the principle that the meeting be conducted in a place open to the public has been outweighed in the circumstances because of information that has been provided previously to the Council under Section 90 of the Local Government Act and retained under Section 91 of the Local Government Act.

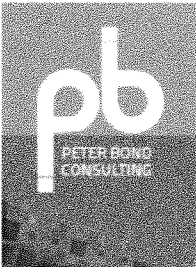
CARRIED.



Survey Report: CEO probationary performance review

**For:
Southern Mallee District Council**

December 2018



Peter Bond | Director
04 11 406 799
bondy.peter@gmail.com
PO Box 236, Victor Harbor SA 5211

1. CONTENTS

1. INTRODUCTION..... 65
2. CONDUCT OF THE SURVEY 65
2.1. SURVEY QUESTIONS.....65
2.2. SURVEY RESPONDENTS.....65
2.3. SURVEY METHODOLOGY.....65
2.4. SURVEY FINDINGS.....66
2.5. RESPONDENTS' COMMENTS71
3. FUTURE SURVEYS79



INTRODUCTION

Peter Bond Consulting has been engaged to assist the Southern Mallee District Council with the probationary performance review for their Chief Executive Officer (CEO) Mr Jason Taylor. The probationary review includes a 360° survey of Elected Members, past Elected Members, selected staff and selected external stakeholders. This report discusses the process and outcomes of the survey.

CONDUCT OF THE SURVEY

The email survey was conducted by Peter Bond Consulting during November and December 2018. In all 22 people were invited to participate in the survey. Staff and external stakeholders were selected by the CEO Performance Review Panel and Mr Taylor.

Mr Taylor also completed a version of the survey and his responses (included in a separate column in the attached tables) to provide a reference point for discussion in relation to any differing perceptions arising from the survey.

Survey questions

The survey contained 20 questions in eight sections, adapted from the CEO Position Description Key Result Areas of:

- strategic planning;
- economic development;
- financial management;
- customer and community engagement;
- governance and reporting;
- representation, public relations and relationships;
- organizational and people management, and
- overall thoughts, suggestions and comments.

Survey questions appear in Attachment 1 to this report.

Survey respondents

Of the 22 people invited 15 completed the survey representing the following groups:

Elected Members - five respondents from seven invited to participate;

Past Elected Members - one respondent from three invited to participate;

Staff – five respondents from six invited to participate; and

External stakeholders – four respondents from six invited to participate.

Survey methodology

For each question respondents were asked to select from the following options to describe the CEO's performance for the period:

1. Strongly disagree with the statement and /or the behaviour is never displayed
 2. Disagree with the statement and /or the behaviour is rarely displayed
 3. Neither agree or disagree and / or behaviour is seen some of the time
 4. Agree with the statement and /or the behaviour is displayed often
 5. Strongly agree with statement and /or the behaviour is always displayed – it is strength
- Unable to comment – have not observed the occurrence of the stated behaviour / action sufficiently to be able to comment / rank / score

At the end of each series of questions respondents were asked to provide any comments about the CEO's performance in that Key Result Area. There was also an opportunity to provide additional comments at the end of the survey. A summary of key comments is included at section 2.5.

Assigning numerical values to the ratings allowed a mean to be calculated for each question. All responses of 'unsure/don't know' were discounted to prevent distortion of results.

Survey findings

Tables 1 to 8 below provide an overview of the results for each section of the survey. The table displays the mean scores by respondent type. Mr Taylor's responses are included with the mean scores.

Table 1: Responses to Strategic Planning performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has progressed the annual delivery of the agreed key Council priorities in the Strategic Management Plan.	3.5	3.5	4.0	3.7	Strongly agree (5)
The CEO has planned for an effective, responsive and controlled organisation by fostering an appropriate structure aligned to the Council's Strategic Management Plan.	3.5	3.5	4.0	3.8	Strongly agree (5)

Table 2: Responses to Economic Development performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has developed a structured implementation plan to promote positive relationships with Council, staff and the community that foster economic growth and social development.	3.3	4.0	5.0	4.0	Agree (4)
The CEO has promoted continued development and growth through identifying projects Council could initiate and support.	4.2	4.2	4.0	4.8	Agree (4)

Table 3: Responses to Financial Management performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has during the budget reporting process, provided Council with information and advice that; addressed Council's goals, worked progressively and in partnership with Council options to improve its financial position, demonstrated prudent management of Council's resources, and outlined potential risks and consequences.	3.5	4.0		3.7	Agree (4)
The CEO has progressed the timely implementation of the budget.	5.0	4.0		4.7	Strongly agree (5)
The CEO has provided simple, effective and regular financial reports to Council within agreed timeframes.	3.7	4.0	4.0	3.8	Agree (4)

Table 4: Responses to Customer and Community Engagement performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has developed a number of strategic alliances and partnerships with key stakeholder groups that have optimised the achievement of Council's goals and objectives.	4.2	4.0	4.8	4.3	Strongly agree (5)
The CEO has created opportunity for community input into Council processes and performed in a way that enhanced the community's satisfaction with Council communication and performance.	3.6	3.7	4.5	3.9	Strongly agree (5)
The CEO has progressed the development of an organisational culture that promoted effective customer service.	4.0	4.0	4.5	4.2	Agree (4)

Table 5: Responses Governance and Reporting performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	

The CEO has fully complied with the requirements of the Local Government Act associated with Council meetings.	4.5	4.5	4.0	4.4	Strongly agree (5)
The CEO has ensured Elected Member satisfaction with the quality of advice and support and the timeliness of responses.	4.25	4.5	5.0	4.4	Agree (4)
The CEO has provided timely and accurate reports to Council on the delivery of the Strategic Management Plan and Council's finances and overall performance against agreed performance indicators.	4.0	5.0		4.3	Strongly agree (5)

Table 6: Responses Representation, Public Relations and Relationships performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has liaised with other Government bodies, represented Council on various committees and managed public relations, media liaison and supported community events.	4.3	4.8	4.5	4.5	Strongly agree (5)
The CEO has created a positive impression that inspires confidence and co-operation.	4.4	4.8	4.5	4.5	Strongly agree (5)
The CEO has promoted Council's achievements in a professional and positive manner.	4.6	4.8	4.5	4.6	Strongly agree (5)

Table 7: Responses to Organisational and People Management performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has provided clear, decisive and effective leadership to all staff.	4.0	4.0	4.7	4.2	Agree (4)

The CEO has ensured that Council meets and complies with its statutory requirements.	4.3	4.0	5.0	4.2	Strongly agree (5)
The CEO has conducted internal audits and efficiency reviews of services and administrative functions.	3.0	4.0		3.8	Agree (4)

Table 8: Responses to Overall performance criteria – by mean score and CEO response

Performance criteria	Mean scores				CEO Response
	Elected Members	Staff	External Stakeholders	All	
The CEO has over the past 4 months performed well in his position of Chief Executive Officer of the Southern Mallee District Council.	4.2	4.5	4.8	4.4	Agree (5)

Respondents' comments

As indicated above survey respondents were invited to add comments under each section of the survey and also overall comments. A number of respondents took the opportunity to add comments. Key themes (and some individual comments) are shown below.

Key Result Area 1 – Strategic Planning

Themes:

- Some external stakeholders unable to respond.
- CEO has raised the bar in terms of responding to the Council's Strategic Management Plan.

Individual comments:

- It's difficult to comment at the 5-month mark, especially in light of the LG elections;
- Insufficient interaction to comment;
- The CEO is bringing a new level of professionalism to Council and making the Elected Members think more strategically;
- Council reporting is now about responding to the Strategic Management Plan;
- Hard to measure, but feel he is working in line with the SMP;
- Early days, but conversations and comments demonstrate understanding in both areas;
- Staff changes indicate links to organisation's vision;
- It was impressive to see the quarterly performance report that Jason presented to Council, with the report referencing the four goals from the SMP;
- Jason has realigned Council's agenda to come under the goals of the SMP;
- Matters that have previously been presented to Council are now circulated to Elected Members via briefings each month;
- Jason welcomes Elected Member contact where clarification on items is required.

CEO Comments:

- I have performed strongly in this area;
- Achievements include linking all Council reports to the Strategic Management Plan and now reporting quarterly (two reports produced to date) on delivery of the annual capital program and the SMP;
- The organisation is being encouraged to be considered and focused on the important and not driven by urgent matters or spot fires. Only strategic and regulated matters are reported to Council and they are supported with a report;
- The Executive team is being well led and enabled to deliver the SMP. Managers are empowered to action administrative tasks and make decisions related to administrative matters, in the past many items went to Council that did not need to.

Key Result Area 2 – Economic DevelopmentThemes:

- Building an excellent network of external stakeholders and proactive in encouraging and supporting community organisations.

Individual comments:

- Drought funding, BBRF and RGF are tangible examples with professional applications submitted;
- Jason has invested time in identifying possible local projects;
- The CEO is a very good communicator with all stakeholders and is a very positive person who wants to engage with people;
- Coming from a larger Council, Jason has a range of ideas and experiences to offer;
- Jason has been a great advocate for the Childcare Service and proposed COGs redevelopment;
- Very community focused and encouraging support of community organisations and local businesses;
- I think community developments will be one of his strong points;
- Economic Development is a work in progress and Jason is working on this need in collaboration with the SMP goals;
- Jason is re-building relationships with the local media and has met an array of community groups from most of the local communities to establish effective networks;
- Jason has demonstrated an ability to re-build relationships with disgruntled community members. He is a great listener and considerate of the needs of others;

CEO Comments:

- This is an area that needs a focus over time and currently suffers due to lack of strategy. There is an obvious need for strategy development in areas that will drive economic development, such as town amenity planning and housing strategy;
- Key achievements in this area have included having an open door policy and meeting with dozens of community groups or organisations. Attracting \$1.22m worth of grant funding to Council, communicating strongly and positively with the media;
- Also developing strong regional relationships, notably partnering with Murraylands and Riverland RDA to pilot a stronger towns economic and social needs analysis.

Key Result Area 3 – Financial ManagementThemes:

- Difficult to measure after such a short period, but early wins with the introduction of quarterly financial performance reporting to Council.

Individual comments:

- the CEO has introduced quarterly reporting with analysis and commentary for elected members;
- the new style of reporting templates to Council provides for improved levels of information;
- Jason has introduced a different style of financial reporting, which I feel is not as thorough as was previously used by SMDC;
- Since commencing Jason has introduced quarterly financial performance reporting to Council and frequently meets with finance staff to improve on reporting needs to Council;

CEO Comments:

- It is difficult to measure financial performance after 4 months. However my key achievements include new strategic financial reporting (despite resistance from some Elected Members wedded to detailed operational finances, more strategic Executive team focus of finances and improvements to department reports, including introduction of phasing and identification of variance % and quantum;
- Budget preparation has already started including new proposal forms for staff and elected members;
- Budget Review 1 is complete and will be reported to Council at the December meeting, this shows solid financial performance over the last six months.

CONFIDENTIAL

Key Result Area 4 – Customer and Community EngagementThemes:

- Improved levels of engagement and a proactive focus on customer needs across the broader Council area.

Individual comments:

- I have seen examples of some good early work in this area;
- Jason actively pursued conversations with community groups;
- the CEO is very approachable and demonstrating improved levels of community engagement;
- Jason is making himself available and being seen in other towns and communities;
- Community engagement for COG's is only happening from childcare staff, not SMDC. This works very well;
- I am confident the CEO has been outstanding with customer and community engagement;
- Jason is still in a stage of building relationships and understanding community needs, but is making good progress;
- 4-months is not long enough to have a strong view on these points, but preliminary indicators are good;
- Jason's action to pursue evening Council meetings demonstrates a focus on making council more accessible to the broader community;
- Jason is very willing to meet with residents and community groups on request;
- One Council meeting a year will now be held in Geranium;

CEO Comments:

- Definitely a key focus area and area of success. The dozens of groups and people I have met with have expressed concerns with how Council has engaged with them in the past, but all willing to work collaboratively for the good of the community;
- I am progressing numerous improvements in this area, including more even spread of Council meetings, greater presence in Geranium, easier payments to libraries, grant application support to groups, media communications and greater CEO attendance at community events and encouraging staff to work positively with the community;
- A change to staff structure to have four clear teams, with all staff having clear reporting lines and responsibilities, will improve responsiveness to customers.

Key Result Area 5 – Governance and ReportingThemes:

- The CEO has improved reporting standards to Council.

Individual comments:

- Jason has been prompt in his response to queries;
- The CEO has delivered improved reporting against the Strategic Management Plan and Capital Works Program;
- After one meeting I felt we were well guided and briefed on proper procedure;
- Jason has implemented improved reporting standards to Council that provide for more information and therefore improved decision making;
- I have observed to date that Jason is very precise, factual and transparent with the information he presents to Council.

CEO Comments:

- A lot of improvements have occurred in this area, most notable the many post-election reports to the first ordinary meeting of the new Council. This has never occurred here before. Council has received a recommendation for all of these matters (eg election of mayor, deputy mayor, representation on committees, conflict of interest, Council Assessment Panel, audit committees etc) in the past rather than a complete report;
- Some Elected Members have been somewhat disappointed with new reporting, primarily because they were interested in the operational matters of Council. I am working to shift this approach by bringing many items to Council that require Elected Member decision making , rather than matters that are the responsibility of the CEO;
- It appears that the effort to deal with many operational matters at Council has stifled progress on strategic matters and there is an overwhelming need to bring numerous matters to Council for decision with the appropriate level of evidence and research. For example an analysis of the Parilla Accommodation Facility and Council's role in this service or the need to commence master planning for central public open space areas of Pinnaroo and Lameroo - both matters to be considered at the December meeting.

Key Result Area 6 – Representation, Public Relations and RelationshipsThemes:

- difficult for external stakeholders to comment;
- developing good relationships is a key strength of the CEO.

Individual comments:

- Good, fresh and professional approach;
- Jason is showing signs of being adept in this area of management;
- The CEO is very good with public relations and is a very good, positive and professional communicator;
- His willingness to talk to the media and provide press releases and updates is a very positive improvement for Council;
- There seems to be a massive increase in the satisfaction of the CEO from within the community;
- Jason has handled public relations and media interactions well, which will reflect positively on the community and Council;
- He is engaging and active in building relationships;
- He will do well in this area;
- Definitely a work in progress as Jason came into an organisation with staff morale at a low base. The feedback I hear from staff is very positive and re-assuring;
- Jason demonstrates excellent leadership skills and is positive in his dealings with others;

CEO Comments:

- I strongly agree I have met these requirements. I have developed strong and positive relationships with a range of regional and state agencies and CEOs;
- The biggest change is that Southern Mallee is now regularly reported on positively in the newspaper and on radio. A lot of community feedback is positive;
- Many staff members appear to be responding well to having their work and their efforts recognised;
- Many community groups are responding well to improved access to the CEO and to Council;
- I worked to ensure the community had more involvement in the Council elections, by providing coverage in the media, presenting Elected Member information sessions in Lameroo and Pinnaroo, and meeting with a number of individuals to encourage participation and understanding of the role;
- In the past a number of Elected Members have tended to speak negatively about the performance of Council staff, particularly works staff, and I have worked to provide more accurate information and to tell the community (through media) and Councillors through written briefings and reports about the achievements of our staff.

Key Result Area 7 – Organisational and People ManagementThemes:

- Difficult for external stakeholders to comment;
- The CEO might look to higher levels of understanding by staff of their roles and function.

Individual comments:

- Interaction with Jason has been limited in this area;
- Jason has taken time to analyse and capture the existing organizational structure;
- Jason recognizes the need for change;
- CEO has addressed a number of administrative functions to streamline processes;
- Still building relationships with staff and reviewing current processes;
- Some staff don't believe they have had the opportunity to meet with Jason properly and feel he does not fully understand their roles;

CEO Comments:

- This has been a major focus. There is a massive amount of work to do in this area, staff have clearly suffered from un-orthodox leadership in the past;
- I talk about my style of leadership openly in team meetings and I model it all the time. I have a desire for all staff to work much more collaboratively and to be strategic, to base their decisions on available evidence;
- I have had to gain the trust and build rapport with staff many of who had become accustomed to doing what they were told rather than being asked for their advice and being given the opportunity to problem solve in an open way;
- The changes that I have initiated, include short new form position descriptions focused on personal skills and key attributes of the role rather than long detailed task focused PDs, new interview guide and reference check form for recruitment, new job ads, new performance review template, commitment to annual performance reviews, new learning and development form, and a number of small working groups to progress key work, like leases renewal and policy review;
- I have documented the structure of the organisation and intend to implement a new structure once the two enterprise bargaining agreements are complete;
- The new structure aligns all administrative staff to one of the teams, i.e. Property and Development Services, Infrastructure Services, Executive Services or Corporate Services. This will improve reporting lines and role clarity and strengthen the Executive team.

Overall CommentsIndividual comments:

- a great start – professional, thoughtful and facts-based CEO who will only improve further with time;
- In the limited time of interaction, Jason has been responsive and enthusiastic;
- There has been positive feedback from community members;
- Jason is well educated, engaging and positive and is introducing a new level of professionalism;
- At times Jason gives the impression that he is almost too politically correct, which some staff have issue with;
- It feels at times that Jason is unreachable;
- Jason has been a breath of fresh air that was much needed for SMDC;
- He makes sound decisions based on fact looking at all the risks both positive and negative;
- During caretaker period, the lack of transparency showed with the organization of the Council Christmas celebrations was a concern;
- Changing the agenda layout and omissions of the correspondence register without consultation with Elected Member was a concern;
- I have been impressed with the way Jason has interacted with the staff and members of the community. He has a very professional approach and that rubs off on the people around him;
- I have been very impressed with Jason's leadership style. I feel he is very progressive and community focused;
- Jason is engaging and friendly and seems very good fit for SMDC. I believe he has performed admirably during a difficult period;
- With limited exposure to Jason, I feel he is intelligent, highly motivated and will do his best for SMDC. I sometimes wonder if he could consult with Elected Members and staff more;
- I found Jason to be highly professional and gives confidence in the Council's ability to foster growth for new programs and ideas;
- Jason's vision matches ours for a connected and vibrant community;
- Overall Jason has performed well in the role of CEO;
- There are some concerns that less information is coming through to the Elected Members now, which could be related to the new Council Agenda format.
- I feel he may be growing into the role, but concerned he might start pushing his own agenda after the probationary period;
- Jason can be very headstrong;
- The changes Jason has implemented to date are all positive. He is very open and transparent with staff;
- Its early days but is wonderful to have such a great role model who has the unique ability to empower and inspire staff.

3. FUTURE SURVEYS

This survey only relates to the CEO's probationary review but does set the foundation for future reviews of his performance. As such future surveys could have regard for the following matters:

- Comments were received from external stakeholders about the difficulty of completing the survey on matters related to the 'internal' workings of the Council. As such there may be merit in offering face to face or telephone interviews with stakeholders to supplement or replace the email survey.
- As discussed with the Performance Review Panel, positive changes to organisational culture are usually reflected in the core values demonstrated by the CEO through his leadership. It might be beneficial to introduce a rating of the CEO's performance in leading the organization through positive demonstration of each of the following core values:
 - being accountable - effective, equitable open, honest
 - being respectful - respect and support for the diversity of our ideas and culture
 - being innovative - demonstrating a strong commitment to continuous improvement
 - being collaborative - focusing on team work within and external to the organization
 - being inclusive - valuing and incorporating local knowledge and viewpoints
 - having integrity - being open and honest and maintaining the highest ethical standards at all times?
 - Do you have any comments about the performance of the CEO in relation to values?
 - Do you have any other comments relating to the performance of the CEO?
- The email survey did prove problematic for a few respondents. As such it is suggested we move to an on-line survey methodology for future reviews. Unfortunately time did not allow for this approach on this occasion.

CONFIDENTIAL

ATTACHMENT 1 – SURVEY QUESTIONS**Section 1: Strategic Planning**

1. The CEO has progressed the annual delivery of the agreed key Council priorities in the Strategic Management Plan.
2. The CEO has Planned for an effective, responsive and controlled organisation by fostering an appropriate structure aligned to the Council's Strategic Management Plan?

Section 2: Economic Development

1. The CEO has developed a structured implementation plan to promote positive relationships with Council, staff and the community that foster economic growth and social development?
2. The CEO has promoted continued development and growth though identifying projects Council could initiate and support?

Section 3: Financial Management

1. The CEO has during the budget reporting process, provided Council with information and advice that; addressed Council's goals, worked progressively and in partnership with Council options to improve its financial position, demonstrated prudent management of Council's resources, and outlined potential risks and consequences?
2. The CEO has progressed the timely implementation of the budget?
3. The CEO has provided simple, effective and regular financial reports to Council within agreed timeframes?

Section 4: Customer and Community Engagement

1. The CEO has developed a number of strategic alliances and partnerships with key stakeholder groups that have optimised the achievement of Council's goals and objectives?
2. The CEO has created opportunity for community input into Council processes and performed in a way that enhanced the community's satisfaction with Council communication and performance?
3. The CEO has progressed the development of an organisational culture that promoted effective customer service?

Section 5: Governance and Reporting

1. The CEO has fully complied with the requirements of the Local Government Act associated with Council meetings?
2. The CEO has ensured Elected Member satisfaction with the quality of advice and support and the timeliness of responses?
3. The CEO has provided timely and accurate reports to Council on the delivery of the Strategic Management Plan and Council's finances and overall performance against agreed performance indicators?

Section 6: Representation, Public Relations and Relationships

1. The CEO has liaised with other Government bodies, represented Council on various committees and managed public relations, media liaison and supported community events Do you have any comments about the performance of the CEO in relation to values?
2. The CEO has created a positive impression that inspires confidence and co-operation?
3. The CEO has promoted Council's achievements in a professional and positive manner.

Section 7: Organisational and People Management

1. The CEO has provided clear, decisive and effective leadership to all staff?
2. The CEO has ensured that Council meets and complies with its statutory requirements?
3. The CEO has conducted internal audits and efficiency reviews of services and administrative functions?