

Employee Name:

Supervisor Name:

Position:

Date:

Supervisor/Manager Assessment: Monitoring and Controlling Resources

Instructions: Please rate your staff member on how he/she demonstrates each of the expected behaviors. With your staff member, compare, discuss, and determine the individual's strengths and opportunities for improvement. It is recommended that the supervisor and staff provide examples to support ratings. Please see the Competency Assessment Supervisor Guide for further instruction on using this assessment tool.

Rating Scale	Definitions
N/A	Not applicable; He / She has not had the opportunity to demonstrate this behavior
1	He/ She rarely demonstrates this behavior; He / She needs improvement in this area
2	He / She usually demonstrates this behavior; He / She meets expectations in this area
3	He / She consistently demonstrates this behavior; He / She exceeds expectations in this area

Behaviors	Rating
<i>Does He/She...</i>	<i>How Frequently Does He/She Do This...</i>
A. Receive and process incoming payments in a timely manner and with a keen attention to detail, keeping up-to-date logs of received and outstanding payments?	
B. Identify and report to management ways to improve work group outcomes for monetary activities?	
C. Determine the cost of required supplies by investigating the optimal balance between item quality and minimizing agency expenditures?	
D. Establish and optimize work group staff schedules and assignments in accordance with the budget and resource considerations?	
E. Prepare purchase orders, reviewing for accuracy and ensuring completion by staff in a timely manner?	
F. Prepare contracts that demonstrate advanced knowledge and consideration of agency needs, contractor products and services, and industry standards?	
G. Identify vendors providing supplies needed both currently and in the future?	
H. Prepare and submit budget estimates and progress reports in a timely manner that accurately predict resource expenditures?	
I. Manage projects and other work activities while adhering to budget, scope, and human capital, proactively looking for opportunities to make improvements to increase efficiency and savings?	
J. Benchmark against other agencies, states, and government programs to document strategic differences and opportunities for improvement?	
Rating Scale Average	

For additional information and resources related to competencies, please refer to the [Competencies](#) tab on the Performance Management & Development page.