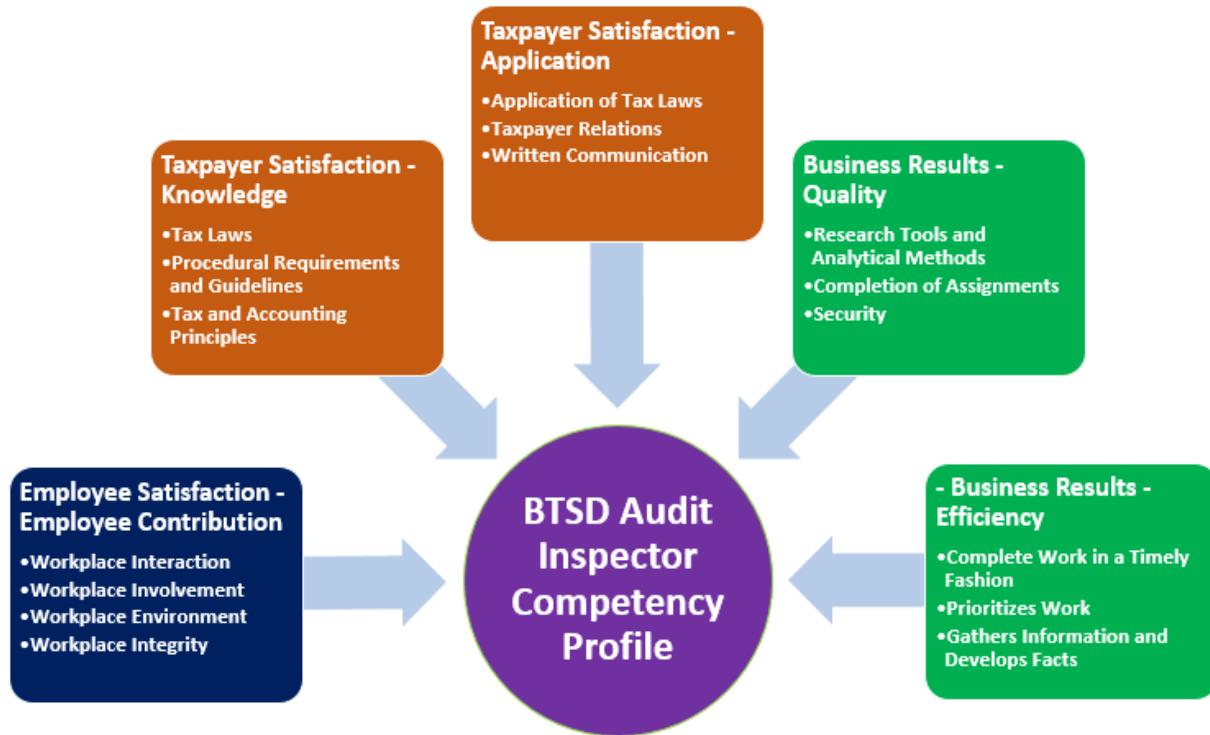


# Competency Profile Surveys/Quantitative Questions



A series of competency profile surveys to assess the competencies (knowledge, skills and attitudes) of the BTSD personnel were created (Appendix A). The purpose of the surveys was to document the current level of competencies (knowledge, skills and attitudes) of the BTSD staff for the following core tax positions: Audit Inspector, Tax Collector and Taxpayer Services Inspector. In addition, a competency profile survey was prepared for BTSD's non-tax personnel. On the following pages are the graphic summaries of each Competency Profile Survey:

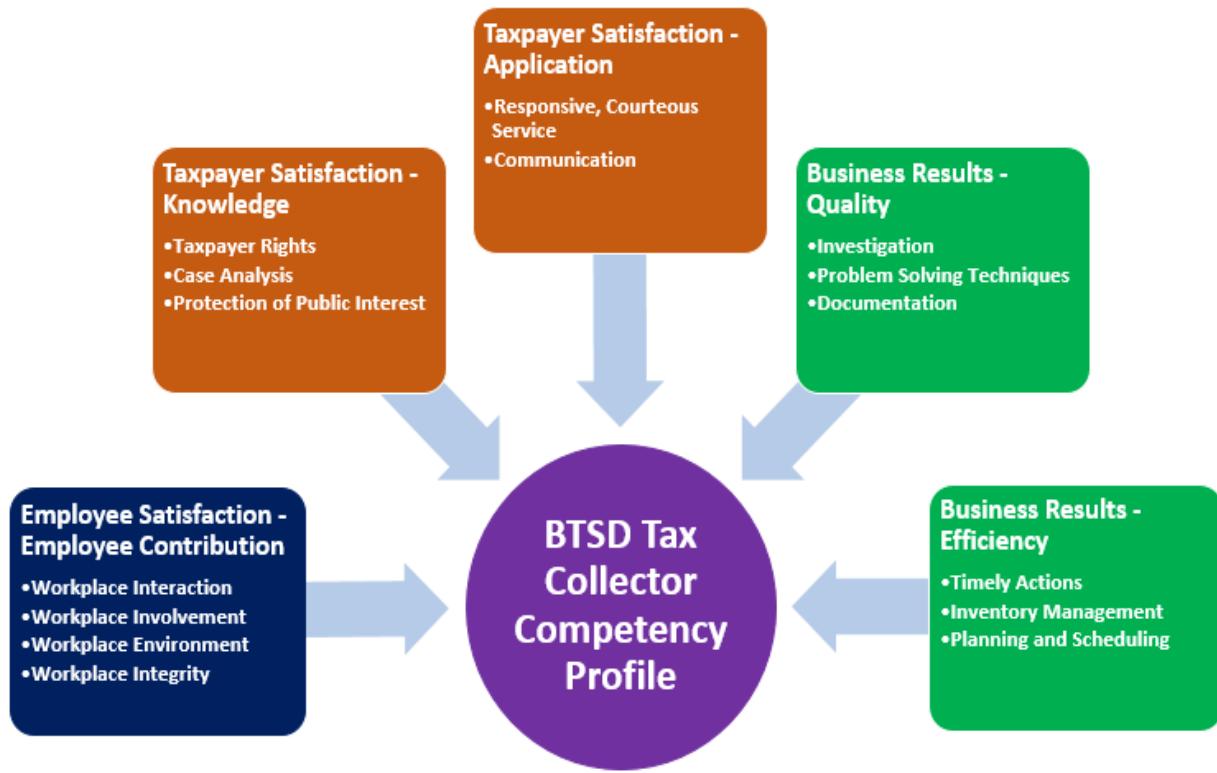
**Figure 1 | BTSD Audit Inspector Competency Profile**



C2D Services – Confidential Material – BTSD Audit Inspector Competency Profile

## Competency Profile Surveys/Quantitative Questions

Figure 2 | BTSD Tax Collector Competency Profile



C2D Services – Confidential Material – BTSD Tax Collector Competency Profile

## Competency Profile Surveys/Quantitative Questions

Figure 3 | BTSD Taxpayers Services Inspector Competency Profile



C2D Services – Confidential Material – BTSD Taxpayer Services Inspector Competency Profile

## Competency Profile Surveys/Quantitative Questions

Figure 4 | BTSD Non-Tax Personnel Competency Profile



C2D Services – Confidential Material – BTSD Non-Tax Personnel Competency Profile

## Appendix A | BTSD Competency Profiles

### Audit Inspector Competency Profile Survey (As of March 21, 2022)

Catalyst to Development (C2D) is conducting a series of competency surveys to support the Belize Tax Service Department (BTSD) in determining the current level of staff competency performance. The data collected from the competency surveys along with reviews of select BTSD documents and assessments will provide a competency profile of BTSD staff and operations. This will permit C2D to recommend actions and training to strengthen BTSD's human resources to strengthen organizational performance.

To begin the process, performance expectations or competencies were established for the following profiles: Audit Inspector, Tax Collector, Taxpayer Services Inspector and Non-Tax Personnel. Competencies are the knowledge, skills and behaviors that BTSD staff should demonstrate in order to meet a satisfactory standard of performance.

In this document are the required knowledge, skills and behaviors or competencies for an Audit Inspector. We would like you to read each of the performance expectations or competencies along with their corresponding description and indicate the importance to your position (the extent to which the competency is required in order to perform your role effectively) and your current level of effectiveness using the rating scale below:

#### RATING SCALE:

NA	1	2	3	4	UD
<i>Not Applicable</i>	<i>Below Average</i>	<i>Average</i>	<i>Above Average</i>	<i>High</i>	<i>Undecided</i>

Please do not confer with your fellow employees as to how you should answer this survey. There are no correct answers, only your self-assessment of your current competency performance.

This survey is anonymous. No details of individual evaluations will be shared with anyone. The results will be tabulated using all of the submitted surveys. The results will assist the BTSD in determining future training curriculum including training priorities for Audit Inspectors. Therefore, we encourage you to read each question carefully and answer honestly. This survey can be important for your future training as well as capacity building at the BTSD.

# Competency Profile Surveys/Quantitative Questions

## I. Demographics

In this section of the survey, we would like you to tell us something about yourself. Your answers to these demographic questions will help us analyze the data. Only aggregate answers will be presented for each question. Therefore, no one will be able to identify your responses to the questions. If you are uncomfortable about answering any of the demographic questions, leave the question blank. If you are comfortable, please put an X next to the statement that best reflects your answer:

1. I am a:	<input type="checkbox"/> Male	<input type="checkbox"/> Female
2. I am:	<input type="checkbox"/> 24 and under	<input type="checkbox"/> Between 30 and 39
	<input type="checkbox"/> Between 25 and 29	<input type="checkbox"/> 40 or over
3. I work from:	<input type="checkbox"/> BTSD Headquarters	<input type="checkbox"/> BTSD District Office
4. I have worked for the BTSD for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
5. I have worked in my current position for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
6. My highest education level achieved is:	<input type="checkbox"/> High School	<input type="checkbox"/> University Degree
	<input type="checkbox"/> Some University courses	<input type="checkbox"/> Post-University Studies

## II. Employee Satisfaction – Employee Contribution

This critical job element measures the degree to which an employee's actions contribute to the overall office working conditions. The employee supports a positive and cooperative atmosphere in the office where everyone is treated with honesty, dignity, and respect, free from harassment and discrimination.

### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workplace Interaction	1. Interacts in a courteous and professional manner with other colleagues and managers to foster and maintain excellent working relationships.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workplace Involvement	2. Participates in identifying and solving workgroup issues.	0	0	0	0	0	0	0	0	0	0	0	0
	3. Participates in activities that maintain or improve workgroup efficiency.	0	0	0	0	0	0	0	0	0	0	0	0
	4. Contributes proactively to the overall effectiveness of the workgroup, its morale, cohesion and productivity as a team.	0	0	0	0	0	0	0	0	0	0	0	0
Workplace Environment	5. Actively supports a work environment free from harassment and discrimination.	0	0	0	0	0	0	0	0	0	0	0	0
	6. Works actively to promote a cooperative working environment.	0	0	0	0	0	0	0	0	0	0	0	0
	7. Willingly shares knowledge and skills within the workplace.	0	0	0	0	0	0	0	0	0	0	0	0
	8. Welcomes managerial direction and adheres to managerial instructions and embraces constructive criticism on aspects of work performance.	0	0	0	0	0	0	0	0	0	0	0	0
Workplace Integrity	9. Contributes to maintaining the integrity of the organization and displays high standards of ethical conduct.	0	0	0	0	0	0	0	0	0	0	0	0
	10. Understands the impact of violating these ethical	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	standards on an organization, self, and others; is trustworthy.												
	11. Behaves in an honest, fair, and ethical manner.	0	0	0	0	0	0						
	12. Shows consistency in words and actions and models high standards of ethics.	0	0	0	0	0	0						

### III.A. Taxpayer Satisfaction – Knowledge

This individual performance-critical job element describes how the employee promotes the satisfaction of taxpayers by providing the technical expertise to serve them with professional and helpful service, at the same time applying that knowledge and technical skill to the task of correctly determining the taxpayer's tax obligation. Accurate identification and resolution of issues and the correct interpretation of laws, rules, regulations and other information sources are key components of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Tax Laws	13. Displays sufficient mastery of tax laws and utilizes research tools to independently conduct relevant research and applies the law to the optimal extent.	0	0	0	0	0	0						
	14. Conducts appropriate research using such sources as the tax	0	0	0	0	0	0						

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	laws and sub-legal acts, public rulings, and other applicable laws of Belize to resolve issues and complete assignments thoroughly, accurately and in a timely fashion.												
Procedural Requirements and Guidelines	15. Demonstrates an authoritative knowledge of the applicable sub-legal acts and other procedural guidelines.	O	O	O	O	O	O	O	O	O	O	O	O
	16. Initiates relevant research and analysis of sub-legal acts and procedural guidelines using other applicable sources (such as peers, managers and other colleagues) to resolve issues or complete assignments thoroughly, accurately and in a timely fashion.	O	O	O	O	O	O	O	O	O	O	O	O
Tax and Accounting Principles	17. Demonstrates a satisfactory knowledge of tax and financial accounting principles necessary to understand, reconcile and analyze taxpayer books and records or financial statements to the required standard.	O	O	O	O	O	O	O	O	O	O	O	O
	18. Demonstrates comfort in identifying and resolving issues or areas where compliance is	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	questionable or lacking.												
	19. Recognizes, considers and utilizes indicators of fraud to inform the best approach to each case.	0	0	0	0	0	0	0	0	0	0	0	0

### III.B. Taxpayer Satisfaction - Application

This individual performance-critical job element describes how the employee promotes the satisfaction of taxpayers through professionally and courteously applying the tax laws in conducting audits and other official tax administration activities. Communications to the taxpayer address the issues in an understandable and professional manner that encourages voluntary compliance.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Application of Tax Laws	20. Conducts tasks in a complete, understandable, accurate and logical manner.	0	0	0	0	0	0	0	0	0	0	0	0
	21. Applies the tax laws correctly.	0	0	0	0	0	0	0	0	0	0	0	0
	22. Cites authority and follows established rulings and precedents in making correct determinations.	0	0	0	0	0	0	0	0	0	0	0	0
	23. Obtains and evaluates the taxpayers' position and addresses the	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	merits of this in the course of case development.												
	24. Explains the taxpayer's options (i.e. agreement or appeal, installment payments, etc.) at all stages of the process/taxpayer relationship.	0	0	0	0	0	0	0	0	0	0	0	0
	25. Demonstrates innovative approaches in order to resolve differences of application of the tax laws.	0	0	0	0	0	0	0	0	0	0	0	0
	26. Demonstrates the ability to work autonomously in an effective manner, without supervision, within the limits of delegated authority.	0	0	0	0	0	0	0	0	0	0	0	0
Taxpayer Relations	27. Identifies taxpayer's education needs and concerns and addresses those needs and concerns in a proactive manner.	0	0	0	0	0	0	0	0	0	0	0	0
	28. Provides information that is complete, understandable and is presented in a logical and professional manner.	0	0	0	0	0	0	0	0	0	0	0	0
	29. Uses clear and precise communication methods appropriate to the listener.	0	0	0	0	0	0	0	0	0	0	0	0
	30. Actively listens to and considers the taxpayer's point of view.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	31. Follows all procedures and guidelines with diligence and confidence.	0	0	0	0	0	0	0	0	0	0	0	0
	32. Is innovative and independent in contacts with taxpayers.	0	0	0	0	0	0	0	0	0	0	0	0
Written Communication	33. Produces written products or case files that are complete, organized, understandable and presented in a logical manner even in the most complex situations.	0	0	0	0	0	0	0	0	0	0	0	0
	34. Demonstrates the ability to work effectively in an autonomous manner – appropriate to the level of delegated authority - in preparing written products except in complex situations where escalation to a more senior colleague may be necessary.	0	0	0	0	0	0	0	0	0	0	0	0
	35. Prepares work papers that are sufficiently detailed, easy to follow and clearly reflect the tasks completed and conclusions reached.	0	0	0	0	0	0	0	0	0	0	0	0
	36. Prepares audit reports that are complete, comprehensive and easy to understand.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

### IV.A. Business Results - Quality

This individual performance -critical job element describes how the employee promotes the achievement of business results by completing assignments thoroughly and accurately within established guidelines. The use of proper research and analytical tools and the protection of taxpayer privacy are key components of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Research Tools and Analytical Methods	37. Uses appropriate analytical methods (and resources such as peers, managers and staff or innovative techniques) to independently conduct research.	0	0	0	0	0	0	0	0	0	0	0	0
	38. Considers current tax law, court cases and taxpayer's position when researching or analyzing assignments.	0	0	0	0	0	0	0	0	0	0	0	0
	39. Interprets findings independently and correctly.	0	0	0	0	0	0	0	0	0	0	0	0
Completion of Assignments	40. Completes assignments thoroughly, accurately, in a timely fashion and within established guidelines.	0	0	0	0	0	0	0	0	0	0	0	0
	41. Develops issues to the extent necessary to resolve them to bring the taxpayer into compliance.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	42. Uses the appropriate report writing software (e.g. IRIS Belize program) for preparation of reports, including time reporting.	0	0	0	0	0	0	0	0	0	0	0	0
	43. Properly prepares closing documents to ensure proper handling and/or recording after the audit is closed.	0	0	0	0	0	0	0	0	0	0	0	0
Security	44. Adheres to computer system and document security requirements, using only authorized equipment and software.	0	0	0	0	0	0	0	0	0	0	0	0
	45. Secures sensitive documents.	0	0	0	0	0	0	0	0	0	0	0	0
	46. Safeguards tax returns and tax return information to prevent unauthorized disclosure.	0	0	0	0	0	0	0	0	0	0	0	0
	47. Adheres to the policy against accessing unauthorized IRIS Belize data, unauthorized computer programs, unauthorized computer web sites, and all other policies regarding unauthorized access or use of official equipment.	0	0	0	0	0	0	0	0	0	0	0	0
	48. Adheres to the laws and regulations regarding disclosure of tax returns and tax	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
		return-related information.											

### IV.B. Business Results - Efficiency

This individual performance-critical job element describes how the employee promotes achievement of business results by completing assignments in a timely fashion within established guidelines. The use of proper workload management and time utilization techniques is a key component of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Complete Work in a Timely Fashion	49. Completes work assignments so that both the total time spent and the time span of the activities is commensurate with the nature and complexity of the work.	O	O	O	O	O	O	O	O	O	O	O	O
	50. Identifies issues that have significant compliance impact and manages own time efficiently, relative to the volume, complexity and urgency of the personal and collective team workload and seldom spends time on items of little materiality.	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	51. Schedules work at the appropriate location in order to ensure maximum efficiency and productivity at all times.	0	0	0	0	0	0	0	0	0	0	0	0
Prioritizes Work	52. Prioritizes, plans and schedules work in a logical and timely manner even when workload is complex and presents conflicting demands.	0	0	0	0	0	0	0	0	0	0	0	0
	53. Efficiently plans and prioritizes own time in order to maximize case management efficiency.	0	0	0	0	0	0	0	0	0	0	0	0
	54. Follows procedures to protect the Government revenue in jeopardy and other special cases.	0	0	0	0	0	0	0	0	0	0	0	0
Gathers Information and Develops Facts	55. Uses appropriate analytical resources, fact- finding and innovative techniques to gather and develop facts that are complete, understandable and logically presented.	0	0	0	0	0	0	0	0	0	0	0	0
	56. Correctly interprets and adheres to applicable procedures, guidelines and standards.	0	0	0	0	0	0	0	0	0	0	0	0

## V. Narrative Questions

Instructions: Please read and respond to each question.

› Question 1: What training would you like to receive to improve your job performance?

## **Competency Profile Surveys/Quantitative Questions**

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- › Question 2: What obstacles prevent you from doing a better job?
- › Question 3: If you could make one improvement at BTSD, what would it be?

## Competency Profile Surveys/Quantitative Questions

### Tax Collector Competency Profile Survey (As of March 21, 2022)

Catalyst to Development (C2D) is conducting a series of competency surveys to support the Belize Tax Service Department (BTSD) in determining the current level of staff competency performance. The data collected from the competency surveys along with reviews of select BTSD documents and assessments will provide a competency profile of BTSD staff and operations. This will permit C2D to recommend actions and training to strengthen BTSD's human resources to strengthen organizational performance.

To begin the process, performance expectations or competencies were established for the following profiles: Audit Inspector, Tax Collector, Taxpayer Services Inspector and Non-Tax Personnel. Competencies are the knowledge, skills and behaviors that BTSD staff should demonstrate in order to meet a satisfactory standard of performance.

In this document are the required knowledge, skills and behaviors or competencies for a Tax Collector. We would like you to read each of the performance expectations or competencies along with their corresponding description and indicate the importance to your position (the extent to which the competency is required in order to perform your role effectively) and your current level of effectiveness using the rating scale below:

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Please do not confer with your fellow employees as to how you should answer this survey. There are no correct answers, only your self-assessment of your current competency performance.

This survey is anonymous. No details of individual evaluations will be shared with anyone. The results will be tabulated using all of the submitted surveys. The results will assist the BTSD in determining future training curriculum including training priorities for Tax Collectors. Therefore, we encourage you to read each question carefully and answer honestly. This survey can be important for your future training as well as capacity building at the BTSD.

# Competency Profile Surveys/Quantitative Questions

## I. Demographics

In this section of the survey, we would like you to tell us something about yourself. Your answers to these demographic questions will help us analyze the data. Only aggregate answers will be presented for each question. Therefore, no one will be able to identify your responses to the questions. If you are uncomfortable about answering any of the demographic questions, leave the question blank. If you are comfortable, please put an X next to the statement that best reflects your answer:

1. I am a:	<input type="checkbox"/> Male	<input type="checkbox"/> Female
2. I am:	<input type="checkbox"/> 24 and under	<input type="checkbox"/> Between 30 and 39
	<input type="checkbox"/> Between 25 and 29	<input type="checkbox"/> 40 or over
3. I work from:	<input type="checkbox"/> BTSD Headquarters	<input type="checkbox"/> BTSD District Office
4. I have worked for the BTSD for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
5. I have worked in my current position for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
6. My highest education level achieved is:	<input type="checkbox"/> High School	<input type="checkbox"/> University Degree
	<input type="checkbox"/> Some University courses	<input type="checkbox"/> Post-University Studies

## II. Employee Satisfaction – Employee Contribution

This critical job element measures the degree to which an employee's actions contribute to the overall office working conditions. The employee supports a positive and cooperative atmosphere in the office where everyone is treated with honesty, dignity, and respect, free from harassment and discrimination.

### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workplace Interaction	1. Interacts in a courteous and professional manner with other colleagues and managers to	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	foster and maintain excellent working relationships.												
Workplace Involvement	2. Participates in identifying and solving workgroup issues.	0	0	0	0	0	0	0	0	0	0	0	
	3. Participates in activities that maintain or improve workgroup efficiency.	0	0	0	0	0	0	0	0	0	0	0	
	4. Contributes proactively to the overall effectiveness of the workgroup, its morale, cohesion and productivity as a team.	0	0	0	0	0	0	0	0	0	0	0	
Workplace Environment	5. Actively supports a work environment free from harassment and discrimination.	0	0	0	0	0	0	0	0	0	0	0	
	6. Works actively to promote a cooperative working environment.	0	0	0	0	0	0	0	0	0	0	0	
	7. Willingly shares knowledge and skills within the workplace.	0	0	0	0	0	0	0	0	0	0	0	
	8. Welcomes managerial direction and adheres to managerial instructions and embraces constructive criticism on aspects of work performance.	0	0	0	0	0	0	0	0	0	0	0	
Workplace Integrity	9. Contributes to maintaining the integrity of the organization and displays high standards of ethical conduct.	0	0	0	0	0	0	0	0	0	0	0	

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	10. Understands the impact of violating these ethical standards on an organization, self, and others; is trustworthy.	0	0	0	0	0	0	0	0	0	0	0	0
	11. Behaves in an honest, fair, and ethical manner.	0	0	0	0	0	0	0	0	0	0	0	0
	12. Shows consistency in words and actions and models high standards of ethics.	0	0	0	0	0	0	0	0	0	0	0	0

### III.A. Taxpayer Satisfaction - Knowledge

This individual performance critical job element describes how the employee promotes the satisfaction of taxpayers and customers by providing the technical expertise to serve the customers with professional and helpful service. Accurate identification and resolution of issues and the correct interpretation of laws, rules, regulations and other information sources are key components of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Taxpayer Rights	13. Educates the taxpayer of their rights throughout the collection process.	0	0	0	0	0	0	0	0	0	0	0	0
	14. Ensures that the taxpayer's rights are observed and protected throughout the collection process.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	15. Protects the confidentiality of taxpayer return and case related information.	0	0	0	0	0	0	0	0	0	0	0	0
	16. Accurately explains the collection process throughout the case progression.	0	0	0	0	0	0	0	0	0	0	0	0
Case Analysis	17. Properly analyzes the case file and other necessary data to work toward efficient case resolution in a thorough and timely fashion.	0	0	0	0	0	0	0	0	0	0	0	0
	18. Analyzes financial information appropriately in order to ensure effective case resolution.	0	0	0	0	0	0	0	0	0	0	0	0
	19. Demonstrates the ability to recognize difficult or unusual issues and proceeds toward proper case resolution by utilizing a wide range of investigative and/or analytical techniques as appropriate.	0	0	0	0	0	0	0	0	0	0	0	0
Protection of Public Interest	20. Uses appropriate enforcement action(s) to resolve the case.	0	0	0	0	0	0	0	0	0	0	0	0
	21. Timely records tax liens in accordance with procedures.	0	0	0	0	0	0	0	0	0	0	0	0
	22. Demonstrates appropriate balance between the need to protect taxpayer's rights with recognition of the impact of	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
		enforcement decisions on all stakeholders.											

### III.B. Taxpayer Satisfaction - Application

This individual performance critical job element describes how the employee promotes the satisfaction of taxpayers and customers through professionally and courteously identifying taxpayer needs and/or concerns and providing quality products and services. Communication to the taxpayer is understandable and appropriate for the issue and encourages voluntary compliance.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Responsive, Courteous Service	23. Responds to customer requests or concerns with courtesy, professionalism and impartiality while balancing a workload with competing priorities.	0	0	0	0	0	0	0	0	0	0	0	0
	24. Establishes and maintains cooperative relationships at all times in order to expedite issue resolution.	0	0	0	0	0	0	0	0	0	0	0	0
	25. Demonstrates a positive professional courteous behavior in the course of serving the public.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	26. Explains taxpayer options (i.e., full payment, submit declaration, installment payments, etc.) in a straightforward, professional and courteous fashion.	0	0	0	0	0	0	0	0	0	0	0	0
	27. Demonstrates the ability to work efficiently and effectively in an autonomous manner, appropriate to the level of delegated authority, with minimum supervision.	0	0	0	0	0	0	0	0	0	0	0	0
Communication	28. Communicates taxpayer's legal obligations, responsibilities and the consequences for failure to comply.	0	0	0	0	0	0	0	0	0	0	0	0
	29. Employs effective listening skills and probing techniques to minimize misunderstanding and facilitate effective case resolution.	0	0	0	0	0	0	0	0	0	0	0	0
	30. Prepares written communications of a high standard (i.e. that are accurate, professional and well structured).	0	0	0	0	0	0	0	0	0	0	0	0
	31. Provides information – whether verbally or in writing - that is complete, understandable and is presented in a logical	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	and professional manner.												
	32. Uses clear and precise communication methods appropriate to the taxpayer or recipient.	0	0	0	0	0	0	0	0	0	0	0	0
Compliance	33. Conducts full compliance checks on all cases.	0	0	0	0	0	0	0	0	0	0	0	0
	34. Educates and assists taxpayers in filing and paying responsibilities.	0	0	0	0	0	0	0	0	0	0	0	0
	35. Takes action to prevent further delinquencies after initial contact.	0	0	0	0	0	0	0	0	0	0	0	0

### IV.A. Business Results - Quality

This individual performance critical job element describes how the employee promotes the achievement of business results by completing assignments thoroughly and accurately within established guidelines. The use of proper research and analytical tools and the protection of taxpayer privacy are key components of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Investigation	36. Attempts to secure sufficient relevant financial information on initial contact to establish a plan of	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	action for case resolution.												
	37. Demonstrate a thorough knowledge of internal and external information sources and applies this knowledge to go beyond the obvious basic sources in order to locate taxpayers and/or their assets.	0	0	0	0	0	0	0	0	0	0	0	0
	38. Uses a full range of investigative techniques to locate assets and verify financial information, while protecting the privacy of the taxpayer.	0	0	0	0	0	0	0	0	0	0	0	0
Problem Solving Techniques	39. Identifies problems by utilizing innovative analytical techniques to identify problems and identify solutions.	0	0	0	0	0	0	0	0	0	0	0	0
	40. Considers all available information, including information provided by the taxpayer, to develop appropriate approaches to reach fair and equitable resolution.	0	0	0	0	0	0	0	0	0	0	0	0
	41. Uses appropriate communication techniques which minimizes taxpayer inconvenience, avoids confrontation and which promotes and enables voluntary compliance.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Documentation	42. Documents case history in a complete, accurate and understandable manner and in sufficient detail to support the outcome of the case.	0	0	0	0	0	0	0	0	0	0	0	0
	43. Maintains case files that are complete and in a neat and orderly manner within established guidelines.	0	0	0	0	0	0	0	0	0	0	0	0
	44. Prepares histories that are sufficiently detailed so that the basis for steps taken and conclusions reached are evident.	0	0	0	0	0	0	0	0	0	0	0	0

### IV.B. Business Results - Efficiency

This individual performance critical job element describes how the employee promotes achievement of business results by completing assignments in a timely fashion within established guidelines. The use of proper workload management and time utilization techniques is a key component of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Timely Actions	45. Responds quickly and effectively to changing priorities while balancing a complex workload and taking	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	timely and appropriate case actions.												
	46. Keeps manager informed of circumstances that may cause delays in case activity and takes steps to minimize any delays.	0	0	0	0	0	0	0	0	0	0	0	0
	47. Addresses interruptions or unscheduled activities in a manner which has minimal impact on timely case actions.	0	0	0	0	0	0	0	0	0	0	0	0
Inventory Management	48. Independently resolves inventory management problems in complicated or unusual situations and in accordance with established guidelines.	0	0	0	0	0	0	0	0	0	0	0	0
	49. Identifies systemic problems and initiates corrective action.	0	0	0	0	0	0	0	0	0	0	0	0
	50. Ensures that taxpayer account and assigned inventory information is current and accurate.	0	0	0	0	0	0	0	0	0	0	0	0
Planning and Scheduling	51. Plans and schedules office and field work based upon inventory needs.	0	0	0	0	0	0	0	0	0	0	0	0
	52. Sets priorities as competing and varied work assignments arise.	0	0	0	0	0	0	0	0	0	0	0	0
	53. Recognizes and deals with complicated or	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/ Competency	Performance Expectations/ Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	unexpected situations that may develop.												
	54. Uses effective planning and organization skills in order to minimize disruptions in case work resolution.	0	0	0	0	0	0	0	0	0	0	0	0

## V. Narrative Questions

Instructions: Please read and respond to each question.

- › Question 1: What training would you like to receive to improve your job performance?
- › Question 2: What obstacles prevent you from doing a better job?
- › Question 3: If you could make one improvement at BTSD, what would it be?

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## Competency Profile Surveys/Quantitative Questions

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### Taxpayer Services Inspector Competency Profile Survey (As of March 21, 2022)

Catalyst to Development (C2D) is conducting a series of competency surveys to support the Belize Tax Service Department (BTSD) in determining the current level of staff competency performance. The data collected from the competency surveys along with reviews of select BTSD documents and assessments will provide a competency profile of BTSD staff and operations. This will permit C2D to recommend actions and training to strengthen BTSD's human resources to strengthen organizational performance.

To begin the process, performance expectations or competencies were established for the following profiles: Audit Inspector, Tax Collector, Taxpayer Services Inspector and Non-Tax Personnel. Competencies are the knowledge, skills and behaviors that BTSD staff should demonstrate in order to meet a satisfactory standard of performance.

In this document are the required knowledge, skills and behaviors or competencies for a Taxpayer Services Inspector. We would like you to read each of the performance expectations or competencies along with their corresponding description and indicate the importance to your position (the extent to which the competency is required in order to perform your role effectively) and your current level of effectiveness using the rating scale below:

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Please do not confer with your fellow employees as to how you should answer this survey. There are no correct answers, only your self-assessment of your current competency performance.

This survey is anonymous. No details of individual evaluations will be shared with anyone. The results will be tabulated using all of the submitted surveys. The results will assist the BTSD in determining future training curriculum including training priorities for Taxpayer Services Inspector. Therefore, we encourage you to read each question carefully and answer honestly. This survey can be important for your future training as well as capacity building at the BTSD.

# Competency Profile Surveys/Quantitative Questions

## I. Demographics

In this section of the survey, we would like you to tell us something about yourself. Your answers to these demographic questions will help us analyze the data. Only aggregate answers will be presented for each question. Therefore, no one will be able to identify your responses to the questions. If you are uncomfortable about answering any of the demographic questions, leave the question blank. If you are comfortable, please put an X next to the statement that best reflects your answer:

1. I am a:	<input type="checkbox"/> Male	<input type="checkbox"/> Female
2. I am:	<input type="checkbox"/> 24 and under	<input type="checkbox"/> Between 30 and 39
	<input type="checkbox"/> Between 25 and 29	<input type="checkbox"/> 40 or over
3. I work from:	<input type="checkbox"/> BTSD Headquarters	<input type="checkbox"/> BTSD District Office
4. I have worked for the BTSD for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
5. I have worked in my current position for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
6. My highest education level achieved is:	<input type="checkbox"/> High School	<input type="checkbox"/> University Degree
	<input type="checkbox"/> Some University courses	<input type="checkbox"/> Post-University Studies

## II. Employee Satisfaction – Employee Contribution

This critical job element measures the degree to which an employee's actions contribute to the overall office working conditions. The employee supports a positive and cooperative atmosphere in the office where everyone is treated with honesty, dignity, and respect, free from harassment and discrimination.

### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workplace Interaction	1. Interacts in a courteous and professional manner with other colleagues and managers to foster and maintain excellent working relationships.	O	O	O	O	O	O	O	O	O	O	O	O
Workplace Involvement	2. Participates in identifying and solving workgroup issues.	O	O	O	O	O	O	O	O	O	O	O	O
	3. Participates in activities that maintain or improve workgroup efficiency.	O	O	O	O	O	O	O	O	O	O	O	O
	4. Contributes proactively to the overall effectiveness of the workgroup, its morale, cohesion and productivity as a team.	O	O	O	O	O	O	O	O	O	O	O	O
Workplace Environment	5. Actively supports a work environment free from harassment and discrimination.	O	O	O	O	O	O	O	O	O	O	O	O
	6. Works actively to promote a cooperative working environment.	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	7. Willingly shares knowledge and skills within the workplace.	0	0	0	0	0	0	0	0	0	0	0	0
	8. Welcomes managerial direction and adheres to managerial instructions and embraces constructive criticism on aspects of work performance.	0	0	0	0	0	0	0	0	0	0	0	0
Workplace Integrity	9. Contributes to maintaining the integrity of the organization and displays high standards of ethical conduct.	0	0	0	0	0	0	0	0	0	0	0	0
	10. Understands the impact of violating these ethical standards on an organization, self, and others; is trustworthy.	0	0	0	0	0	0	0	0	0	0	0	0
	11. Behaves in an honest, fair, and ethical manner.	0	0	0	0	0	0	0	0	0	0	0	0
	12. Shows consistency in words and actions and models high standards of ethics.	0	0	0	0	0	0	0	0	0	0	0	0

### III.A. Taxpayer Satisfaction - Knowledge

This individual performance critical job element describes how the employee promotes the satisfaction of taxpayers and customers by providing the technical expertise to serve the customers with professional and helpful service. Accurate identification and resolution of issues and the correct interpretation of laws, rules, regulations and other information sources are key components of this critical job element.

## Competency Profile Surveys/Quantitative Questions

### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Tax Laws	13. Interprets and applies tax laws appropriately in order to determine the taxpayer's situation and demonstrate the ability to explain probable consequences logically and articulately.	0	0	0	0	0	0	0	0	0	0	0	
	14. Demonstrates an authoritative knowledge of tax laws and regulations, policies and procedures.	0	0	0	0	0	0	0	0	0	0	0	
	15. Identifies issues and anticipates related issues by utilizing effective probing techniques, paraphrasing and demonstrating skill in reviewing technical information.	0	0	0	0	0	0	0	0	0	0	0	
	16. Identifies and appropriately refers issues that need to be resolved by other BTSD personnel.	0	0	0	0	0	0	0	0	0	0	0	
General Knowledge	17. Demonstrates a sufficient understanding of business practices, general legal	0	0	0	0	0	0	0	0	0	0	0	

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	concepts, financial practices and basic accounting concepts.												
	18. Applies these concepts and practices for the purposes of correctly responding to taxpayer inquiries with confidence.	0	0	0	0	0	0	0	0	0	0	0	0
	19. Follows all applicable and established procedures and office guidelines.	0	0	0	0	0	0	0	0	0	0	0	0
	20. Exercises good judgment in decision-making in such areas as calling to request further required information, resolving the issue, requesting advice or referring the matter elsewhere for resolution/completion .	0	0	0	0	0	0	0	0	0	0	0	0
Research Ability	21. Conducts research that utilizes the appropriate resources in a manner which is thorough, accurate and effective in correctly responding to the inquiry.	0	0	0	0	0	0	0	0	0	0	0	0
	22. Demonstrates a strong ability to research tax laws, administrative instructions, BTSD procedures, and other appropriate materials, applying the knowledge in the correct way.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	23. Demonstrates ability to research IRIS Belize and other electronic information and correctly interpret and apply information obtained.	O	O	O	O	O	O	O	O	O	O	O	O

### III.B. Taxpayer Satisfaction - Application

This individual performance critical job element describes how the employee promotes the satisfaction of taxpayers through professionally and courteously applying the tax laws and appropriate procedures in providing assistance to taxpayers and in other official tax administration activities. Communications to the taxpayer address the issues in an understandable and professional manner that encourages voluntary compliance.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Verbal Communication	24. Communicates with taxpayers in a firm, courteous, businesslike and professional manner.	O	O	O	O	O	O	O	O	O	O	O	O
	25. Uses effective communication techniques to secure the cooperation of both taxpayers and colleagues during the course of the work.	O	O	O	O	O	O	O	O	O	O	O	O
	26. Demonstrates skill and tact in explaining conclusions and	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	alternatives in order to minimize misunderstandings and avoid provoking adverse taxpayer reaction.												
	27. Uses effective listening skills and is courteous and tactful in ensuring that taxpayers and colleagues understand the explanations provided and information given.	0	0	0	0	0	0	0	0	0	0	0	0
	28. Provides accurate, clear, complete and concise verbal communication appropriate to the taxpayer's level of understanding.												
Verbal Communication	29. Demonstrates the ability to diffuse actual or potential confrontational situations.	0	0	0	0	0	0	0	0	0	0	0	0
	30. Takes corrective action to ensure appropriate follow-up and closure where the customer has been provided with incorrect advice or unsatisfactory service levels.	0	0	0	0	0	0	0	0	0	0	0	0
	31. Apologizes appropriately for any BTSD errors and explains corrective actions when necessary, taking	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	ownership for the correction and any necessary follow-up/resolution.												
	32. Fully explains actions BTSD may take, actions the taxpayer must take, and, if applicable, taxpayer options (i.e. agreement or appeal, installment payments, etc.). Checks taxpayer understanding of the process and ensures they understand their rights and obligations.	0	0	0	0	0	0	0	0	0	0	0	0
Written Communication	33. Prepares tactful, well structured, accurate and clearly written communications.	0	0	0	0	0	0	0	0	0	0	0	0
	34. Explains factual conclusions and cites applicable tax law fully and concisely in understandable terms.	0	0	0	0	0	0	0	0	0	0	0	0
	35. Prepares written communications that are complete, understandable and presented in a logical and professional manner, avoiding the requirement for any subsequent clarification or correction.	0	0	0	0	0	0	0	0	0	0	0	0
	36. Works efficiently and effectively in an autonomous manner - appropriate to the level of delegated	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	authority - in preparing written products except in complex situations where the intervention of a more expert or senior colleague is procedurally required.												
Taxpayer Relations	37. Fosters good taxpayer relations through listening to taxpayers to identify and respond to their needs in a proactive fashion.	0	0	0	0	0	0	0	0	0	0	0	0
	38. Educates or advises taxpayers of tax law responsibilities to foster compliance so that they fully understand the consequences of non-compliance.	0	0	0	0	0	0	0	0	0	0	0	0
	39. Ensures that new businesses fully understand their filing and paying obligations and provide accurate registration information.	0	0	0	0	0	0	0	0	0	0	0	0
	40. Provides taxpayers with a clear explanation of their rights and obligations in accordance with established laws and regulations.	0	0	0	0	0	0	0	0	0	0	0	0

### IV.A. Business Results - Quality

## Competency Profile Surveys/Quantitative Questions

This individual performance critical job element describes how the employee promotes the achievement of business results by completing assignments thoroughly and accurately within established guidelines. The use of proper research and analytical tools and the protection of taxpayer privacy are key components of this critical job element.

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
<b>Security and Disclosure</b>	41. Secures sensitive documents, such as tax declarations and tax records, properly.	O	O	O	O	O	O	O	O	O	O	O	O
	42. Safeguards tax declaration information to prevent unauthorized disclosure or unauthorized access.	O	O	O	O	O	O	O	O	O	O	O	O
	43. Limits inquiries to information necessary to complete assigned tasks.	O	O	O	O	O	O	O	O	O	O	O	O
	44. Adheres to the policy against accessing unauthorized IRIS Belize data, unauthorized computer programs, unauthorized computer web sites, and all other policies regarding unauthorized access or use of official equipment.	O	O	O	O	O	O	O	O	O	O	O	O
	45. Adheres to the laws and regulations regarding disclosure of tax declarations and tax declaration-related information.	O	O	O	O	O	O	O	O	O	O	O	O
<b>Forms and Reports</b>	46. Completes assignments thoroughly, accurately, in a timely	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	fashion and within established guidelines.												
	47. Completed reports are professional and accurate, include all appropriate information and require minimal rechecking or correction by other colleagues/managers.	0	0	0	0	0	0	0	0	0	0	0	0
	48. Uses the appropriate electronic process or program for preparation or input of forms, declarations, and reports.	0	0	0	0	0	0	0	0	0	0	0	0
	49. Knows the correct forms (both taxpayer and BTSD) to complete in all circumstances.	0	0	0	0	0	0	0	0	0	0	0	0
	50. Is able to assist customers in the completion of forms where this is necessary.	0	0	0	0	0	0	0	0	0	0	0	0
Technical Application	51. Applies IRIS Belize input and research procedures.	0	0	0	0	0	0	0	0	0	0	0	0
	52. Applies appropriate corporate income tax, individual income tax, value-added tax, and withholding tax laws to assist taxpayers to meet their obligations.	0	0	0	0	0	0	0	0	0	0	0	0
	53. Determines and explains status of taxpayer account(s), explains notices, and	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	takes corrective action, or explains actions the taxpayer must take, as appropriate.												

### IV.B. Business Results - Efficiency

This individual performance critical job element describes how the employee promotes achievement of business results by completing assignments in a timely fashion within established guidelines. The use of proper workload management and time utilization techniques is a key component of this critical job element.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workload Management	54. Prioritizes work assignments appropriately.	0	0	0	0	0	0	0	0	0	0	0	0
	55. Prepares work papers in a timely fashion.	0	0	0	0	0	0	0	0	0	0	0	0
	56. Follows procedural guidelines, tax laws, regulations, rulings, and other materials in assisting taxpayers.	0	0	0	0	0	0	0	0	0	0	0	0
	57. Maintains case files and reference materials in a highly organized manner to ensure that the correct information is readily available.	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Planning and Scheduling	58. Makes efficient use of scheduled and unscheduled time to complete assignments, to ensure availability to taxpayers requiring assistance, and ensure correspondence and other work assignments are current and up-to-date.	0	0	0	0	0	0	0	0	0	0	0	0
	59. Identifies information and data needed to address inquiries and explain the tax procedures (including registration, declaration submission, payment requirements, collection, and audit) to taxpayers.	0	0	0	0	0	0	0	0	0	0	0	0
	60. Prioritizes, plans and schedules work in a logical and time-efficient manner, even when the workload is complex and presents conflicting demands.	0	0	0	0	0	0	0	0	0	0	0	0
Time Utilization	61. Completes work assignments such that both the total time spent and the time-span of the activities is commensurate with the nature, complexity and significance of the work.	0	0	0	0	0	0	0	0	0	0	0	0
	62. Takes steps to predict and avoid delays	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/ Competency	Performance Expectations/ Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	during the work process.												
	63. Avoids irrelevant issues and controls the conversations in order to provide the necessary information in a concise and prompt manner.	O	O	O	O	O	O	O	O	O	O	O	O

## V. Narrative Questions

Instructions: Please read and respond to each question.

- › Question 1: What training would you like to receive to improve your job performance?
- › Question 2: What obstacles prevent you from doing a better job?
- › Question 3: If you could make one improvement at BTSD, what would it be?

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## Competency Profile Surveys/Quantitative Questions

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### Non-Tax Personnel Competency Profile Survey (As of March 21, 2022)

Catalyst to Development (C2D) is conducting a series of competency surveys to support the Belize Tax Service Department (BTSD) in determining the current level of staff competency performance. The data collected from the competency surveys along with reviews of select BTSD documents and assessments will provide a competency profile of BTSD staff and operations. This will permit C2D to recommend actions and training to strengthen BTSD's human resources to strengthen organizational performance.

To begin the process, performance expectations or competencies were established for the following profiles: Audit Inspector, Tax Collector, Taxpayer Services Inspector and Non-Tax Personnel. Competencies are the knowledge, skills and behaviors that BTSD staff should demonstrate in order to meet a satisfactory standard of performance.

In this document are the required knowledge, skills and behaviors or competencies for Non-Tax Personnel. We would like you to read each of the performance expectations or competencies along with their corresponding description and indicate the importance to your position (the extent to which the competency is required in order to perform your role effectively) and your current level of effectiveness using the rating scale below:

**RATING SCALE:**

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Please do not confer with your fellow employees as to how you should answer this survey. There are no correct answers, only your self-assessment of your current competency performance.

This survey is anonymous. No details of individual evaluations will be shared with anyone. The results will be tabulated using all of the submitted surveys. The results will assist the BTSD in determining future training curriculum including training priorities for Non-Tax Personnel. Therefore, we encourage you to read each question carefully and answer honestly. This survey can be important for your future training as well as capacity building at the BTSD.

# Competency Profile Surveys/Quantitative Questions

## I. Demographics

In this section of the survey, we would like you to tell us something about yourself. Your answers to these demographic questions will help us analyze the data. Only aggregate answers will be presented for each question. Therefore, no one will be able to identify your responses to the questions. If you are uncomfortable about answering any of the demographic questions, leave the question blank. If you are comfortable, please put an X next to the statement that best reflects your answer:

1. I am a:	<input type="checkbox"/> Male	<input type="checkbox"/> Female
2. I am:	<input type="checkbox"/> 24 and under	<input type="checkbox"/> Between 30 and 39
	<input type="checkbox"/> Between 25 and 29	<input type="checkbox"/> 40 or over
3. I work from:	<input type="checkbox"/> BTSD Headquarters	<input type="checkbox"/> BTSD District Office
4. I have worked for the BTSD for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
5. I have worked in my current position for:	<input type="checkbox"/> Under a year	<input type="checkbox"/> 5 to 10 years
	<input type="checkbox"/> 1 to 4 years	<input type="checkbox"/> Over 10 years
6. My highest education level achieved is:	<input type="checkbox"/> High School	<input type="checkbox"/> University Degree
	<input type="checkbox"/> Some University courses	<input type="checkbox"/> Post-University Studies

## II. Employee Satisfaction – Employee Contribution

This critical job element measures the degree to which an employee's actions contribute to the overall office working conditions. The employee supports a positive and cooperative atmosphere in the office where everyone is treated with honesty, dignity, and respect, free from harassment and discrimination.

### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Workplace Interaction	1. Interacts in a courteous and professional manner with customers and other colleagues and	O	O	O	O	O	O	O	O	O	O	O	O

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	managers in such a way as promotes excellent working relationships.												
Team Involvement	2. Actively participates in identifying or solving team issues; anticipates activities that maintain or improve team efficiency and contributes to the solution.	0	0	0	0	0	0	0	0	0	0	0	0
	3. Contributes proactively to the overall effectiveness of the team, its morale, its cohesion and its productivity.	0	0	0	0	0	0	0	0	0	0	0	0
Workplace Environment	4. Actively supports a work environment free from harassment and discrimination.	0	0	0	0	0	0	0	0	0	0	0	0
	5. Works actively to promote a cooperative working environment; willingly shares knowledge and skills within the workplace.	0	0	0	0	0	0	0	0	0	0	0	0
	6. Welcomes managerial direction and adheres to managerial instructions; embraces constructive criticism from the line manager in order to improve performance.	0	0	0	0	0	0	0	0	0	0	0	0
Workplace Integrity	7. Contributes to maintaining the integrity of the organization and	0	0	0	0	0	0	0	0	0	0	0	0

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	displays high standards of ethical conduct.												
	8. Understands the impact of violating these ethical standards on an organization, self, and others; is trustworthy.	0	0	0	0	0	0						
	9. Behaves in an honest, fair, and ethical manner.	0	0	0	0	0	0						
	10. Shows consistency in words and actions and models high standards of ethics.	0	0	0	0	0	0						

### III.A. Customer Satisfaction - Knowledge

How the employee promotes the satisfaction of customers by providing them with professional and helpful service through the application of their technical expertise, at the same time applying that knowledge and technical skill to the task of correctly determining the customer's concerns, needs and expectations. Accurate identification and resolution of issues and the correct interpretation of laws, rules, regulations and other information sources are key components.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
General Knowledge	11. Possesses and demonstrates an authority of knowledge relevant to the role and explains	0	0	0	0	0	0						

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
	this in a manner readily understandable by the customer.												
<b>BTSD Procedure Requirements and Guidelines</b>	12. Applies own expertise of role-specific, procedural and guideline knowledge in the appropriate way and is able to explain own knowledge in a manner readily understandable by the customer.	0	0	0	0	0	0	0	0	0	0	0	0
<b>Customer Service Delivery</b>	13. Applies application of own knowledge in order to support effective completion of defined activities.	0	0	0	0	0	0	0	0	0	0	0	0

### III.B. Customer Satisfaction – Application

How the employee promotes the satisfaction of customers through professionally and courteously applying the tax (and other applicable) laws, BTSD and Governmental policies and procedures; and, in terms of technical guidance, development of procedural instructions, conducting internal audits, processing appeal cases etc. and other official tax administration activities. Communications with the customer address the issues in an understandable and professional manner.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Attention to Customer	14. Demonstrates the centrality of customer thinking in actions and interactions with customers to agreed standards and deadlines; continuously seeks to enhance the customer experience.	0	0	0	0	0	0	0	0	0	0	0	0
Critical Thinking or Analytical Thinking	15. Is able to analyze information using a variety of methods and applies the information in a logical and deductive way in order to clarify issues and solve problems.	0	0	0	0	0	0	0	0	0	0	0	0
Verbal and Written Communications	16. Adopts an appropriate confident professional tone in all written and verbal communication exchanges and imparts and interprets information effectively.	0	0	0	0	0	0	0	0	0	0	0	0

### IV.A. Business Results - Quality

How the employee promotes the achievement of business results by completing assignments thoroughly and accurately within established guidelines. The use of proper research and analytical tools and the protection of customer privacy are key components.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Proactive	17. Plans and executes activities in a logical and structured fashion in order to achieve the desired results.	O	O	O	O	O	O	O	O	O	O	O	O
Problem Solving	18. Utilizes a variety of techniques and demonstrates sufficient tenacity in order to consider key factors, analyze alternative approaches and apply the right approach to reach the desired outcomes.	O	O	O	O	O	O	O	O	O	O	O	O
Making Decisions	19. Exercises sound judgment and reasoned discipline in decision-making appropriate to the level of delegated authority.	O	O	O	O	O	O	O	O	O	O	O	O

### IV.B. Business Results - Efficiency

How the employee promotes achievement of business results by completing assignments in a time-efficient manner within established guidelines. The use of proper workload management and time utilization techniques are key components.

#### RATING SCALE:

NA	1	2	3	4	UD
Not Applicable	Below Average	Average	Above Average	High	Undecided

## Competency Profile Surveys/Quantitative Questions

Performance Expectations/Competency	Performance Expectations/Competency Description	Please rate the importance to your position						Please rate your current level of effectiveness					
		NA	1	2	3	4	UD	NA	1	2	3	4	UD
Planning and Scheduling	20. Manages own time effectively, prioritizes in a disciplined fashion and always strives to utilize own time to support customers where additional availability is identified/planned.	0	0	0	0	0	0	0	0	0	0	0	0
Follow-up and Control	21. Demonstrates tenacity to complete work in every aspect and proactively initiates necessary follow-up where procedures or sound judgment determines that this is necessary to achieve the desired outcomes.	0	0	0	0	0	0	0	0	0	0	0	0
Timely Work Completion	22. Demonstrates the ability to consistently meet completion targets and deadlines through effective planning, self-management and efficient execution.	0	0	0	0	0	0	0	0	0	0	0	0

## V. Narrative Questions

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