

PERFORMANCE MANAGEMENT: MAKING IT SIMPLE

UTAH ASSOCIATION OF COUNTIES

Presented by:

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Executive Assistant Template - (Template 06/08/2010)

Alignment with the Agency Strategic Plan

Goal 1: Administrative Support for Commissioners

Expectation: Prepare agendas and minutes for Office of the Commission meetings in a timely and accurate manner. Prepare reports for the Governor, including weekly, monthly and Legislative bill tracking. Assist in preparation and monitoring of annual budget. Order and purchase equipment, supplies and services for Commission Office.

Strategy: Agendas should be sent out prior to meetings; minutes from executive staff meeting should be prepared in time for the following meeting; approved meetings for executive staff meeting should be sent to division directors the day they are approved. Reports to the Governor should be sent in the following manner: 1) Weekly - by noon each Thursday; 2) Monthly - by noon the last Thursday of each month; 3) Balanced Scorecard - by 6 p.m. on the 15th of each month; 4) Legislative tracking as requested by Governor's office. Brief Commission on budget status monthly or as requested.

Support Required: Additions and changes to agendas, minutes and Governor's reports provided in a timely manner. Receive budget information from Administration in a timely manner.

Expected Outcome: Deadlines met and budget information provided to Commissioners.

Timetable: 09/07/2010 to 06/30/2011

Goal 2: Calendars and Schedules

Expectation: Provide accurate and timely calendars for Commissioners. Facilitate travel arrangements and meetings.

Strategy: Use GroupWise to keep schedule current and updated. Work with Travel unit to make travel arrangements and file required paper work.

Support Required: Communication regarding schedule plans. Provide travel preferences and documentation for reimbursements.

Expected Outcome: Travel policies compiled with and Commissioners satisfied with their schedules and accommodations.

Timetable: 09/07/2010 to 06/30/2011

Goal 3: Special Projects

Expectation: Complete special projects upon Commissioners' request

Strategy: Accept assignments and complete projects to the satisfaction of the Commission in a timely fashion.

Support Required: Clear communication and expectations from Commissioners.

Expected Outcome: Requested projects are completed in efficient and effective manner.

Timetable: 09/07/2010 to 06/30/2011

Goal 4: Administrative Legal Documents

Expectation: Prepare Administrative Rules; provide administrative support and follow-through on Private Letter Rulings; prepare and organize all Tax Commission cases appealed to District Court,

Strategy: Use desktop and laptop computers consistently observing all appropriate use, safety and security guidelines provided by the agency and the network administrators. Learn and use all agency applications such as BASE, etc. appropriately and with expertise. Learn and use agency provided production software with ease and expertise. Participate in technology training when available.

Support Required: Technology training. Computer software and network access. Supervisor(s) support. Local Network Administrator support.

Expected Outcome: Positive feedback from co-workers, education customers and the public. Attendance at technology training offered.

Timetable: 04/30/2015 to

Goal 5: Teamwork

Expectation: Maintain an active and viable role in the accounting section through excellent service, participation, and communication.

Strategy: --Actively engage in and support team efforts and activities including staff meetings. -- Provide technical assistance to complete additional assignments as needed. --Provide suggestions for improvements to the office environment. --Openly communicate workload or additional training or assistance needs. --Maintain punctuality and communication regarding work schedule and work related activities with supervisor(s) and fellow support staff per state, agency, and section expectations. --Provide excellent customer service to other team members as needed.

Support Required: Assistance from accounting co-workers and supervisors.

Expected Outcome: Measured by feedback from accounting co-workers and supervisors.

Timetable: 04/30/2015 to

GENERIC: PROFESSIONAL Template - (Template 02/23/2010)

Alignment with the Agency Strategic Plan

Goal 1: Professionally perform core job responsibilities

Expectation: * Demonstrate competence in your job functions * Maintain helpful and courteous relationships with customers and the public * Respond to emails and telephone calls in a timely manner * Make and keep commitments * Complete tasks within reasonable time and/or within established timelines * Seek out opportunities to expand and/or improve agency programs and services * Remain flexible in interactions

Strategy:

Support
Required:

Expected
Outcome:

Timetable: 02/23/2010 to 06/30/2011

Goal 2: Work effectively as a team member

Expectation: * Maintain high quality work relationships with associates * Treat all team members with respect and make them feel valued * Avoid conflict which contributes to anger, resentment, or hurt feelings * Network and collaborate with associates to develop 'best' practices * Actively participate on cross functional workgroups or projects as requested

Strategy:

Support
Required:

Expected
Outcome:

Timetable: 02/23/2010 to 06/30/2011

Goal 3: Comply with agency policies and work standards

Expectation: * Be professionally discrete and maintain confidential information in accordance with GRAMA * Maintain regular and predictable attendance and punctuality * Dress appropriately * Use work time efficiently and effectively

Strategy:

Support
Required:

Expected
Outcome:

Timetable: 02/23/2010 to 06/30/2011

Goal 4: Work effectively with supervisor

Expectation: * Regularly provide progress reports and keep supervisor apprised of important customer issues and potential problems in a timely manner * Be open to feedback and direction * When identifying problems, strive to also identify and propose solutions

Strategy:

Support

Strategy:

Support

Required:

Expected

Outcome:

Timetable: 02/23/2010 to

Goal 5: Comply with policies and work standards

Expectation: * Maintain regular and predictable attendance and punctuality * Dress appropriately per established agency guidelines * Follow agency, State and DHRM policies and standards * Document justification and approval regarding exceptions

Strategy:

Support

Required:

Expected

Outcome:

Timetable: 02/23/2010 to

Goal 6: Develop professionally

Expectation: * Identify and pursue opportunities to enhance your knowledge and skills * Take advantage of opportunities to help others to learn systems, processes and programs * Learn to use changing technology effectively, as appropriate for the job

Strategy:

Support

Required:

Expected

Outcome:

Timetable: 02/23/2010 to

Possible Agenda Items for Monthly/Quarterly Performance Management Discussions

1. Professionally perform your assigned job tasks (Do your job)

- a. What are you working on right now? What have you most recently accomplished?
- b. Have you faced any challenges in doing your job?
- c. Do you have any questions about the expectations I have of you?
- d. Is there anything I can do to facilitate your work?
- e. What do you like most about your responsibilities? What do you like least?
- f. May I share with you a couple of observations I've made?

2. Complete your projects in a timely manner

- a. Can we review your project status report?
- b. What are you working on right now? What's next up?
- c. How are you doing on time lines? Are you going to be able to get it all done?
- d. What successes have you had with project X?
- e. What challenges are you facing with project Y?
- f. What assistance do you need from me or others to complete your projects?
- g. May I share with you a couple of observations I've made?

3. Work effectively as a team member (Get along with others)

- a. Who have you most regularly collaborated with? In what ways?
- b. Have you had any challenges in working with other members of our team?
- c. Is there anything I can do to help you build better relationships?
- d. May I share with you a couple of observations I've made?

4. Comply with policies and work standards

- a. Do you have any questions about the requirements of the policies and standards listed here?
- b. May I share with you a couple of observations I've made?

5. Work effectively with supervisor (Keep me informed)

- a. Is there anything you want to make me aware of that I may not know about yet?
- b. May I share with you a couple of observations I've made?

6. Develop professionally

- a. How are you doing on your professional development goals?
- b. What are you doing right now? What's next?
- c. How can I assist you in accomplishing your goals?
- d. May I give you some feedback on observations I've made in relation to your career development?