WRITING AND CONDUCTING SUCCESSFUL PERFORMANCE EVALUTIONS

'Performance evaluations are like compasses.
They give your exact position and provide
direction'.

A resource
guide for
supervisors
and staff
employees

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Definition of performance evaluation

A performance evaluation is a formal management system that provides for the evaluation of the quality of an individual's performance in an organization.

For supervisors, evaluating the performance of your employee may be perhaps one of your most valuable tools. Evaluations that are well-planned and conducted with sensitivity will help you to accomplish three critical tasks:

1. develop staff
2. offer an opportunity to perform as a leader among the team and,
3. guide work performance

Performance evaluations also:

•   recognize good performance
•   jointly establish measurable expectations for the next evaluation period
•   outline a plan to facilitate improved performance
•   provide an accurate legal record of each employee's job performance
•   afford an opportunity to discuss career development needs
•   indicate evidence for increments
•   provide support for promotion

"In many ways, performance evaluations are celebrations of past successes and golden opportunities to start again and build new achievements."

Two Types of Evaluations

There are two formal performance evaluations: the six-month evaluation and the annual evaluation.

<u>The Six-Month Evaluation</u>

Six-month probation is completed by all associate and support staff members who are either new to the college or have changed positions within the college either by transfer or promotion, and there has been a grade change. The purpose of the six-month evaluation is to determine if regular status will be granted to the employee. If regular status is not recommended, the supervisor must provide the appropriate documentation required by the Office of Human Resource and Strategic Talent Management (HRSTM). If regular status is granted, no increase in salary occurs at this time.

Important! Unless HRSTM has been notified, and probation extension granted, regular status is <u>automatically granted</u> if the six-month evaluation is not conducted *prior* to the date ending the six-month probation.

<u>The Annual Evaluation</u>

Staff employees are reviewed annually between June and August. Employees may receive a salary increment at this time unless the increase is not recommended. Supervisors must provide the appropriate documentation required by HRSTM if an increment is not recommended. Remember: employees should not receive any surprise feedback— informal, continuous discussion and feedback between staff and supervisor throughout the year prevents surprises.

Important! An increment is <u>automatically granted</u> to the employee if the annual evaluation is not conducted *prior* to the August deadline.

Purpose of performance evaluations

Providing Feedback:

Providing feedback is the most common explanation for a performance evaluation system. Through this process the individual learns exactly how well he or she did during the previous review period.

Encouraging Performance Improvement:

A good performance evaluation points out areas where individuals need to improve their performance.

Setting and Measuring Goals:

Goal setting is a management process that generates high performance. The performance evaluation process is used to make sure that every member of the institution sets and achieves effective goals.

Counseling Poor Performers:

Performance evaluations force supervisors to confront those whose performance is not meeting expectations.

Encouraging Coaching and Mentoring:

Supervisors are expected to be good coaches and mentors. Performance appraisal identifies the areas where coaching is necessary and encourages supervisors to take an active coaching role.

Providing Legal Defensibility:

Almost any personnel decision—termination, denial of a promotion, transfer to another department can be subjected to legal scrutiny. If one of these is challenged, the institution must be able to demonstrate that the decision it made was not based on any protected aspect of the employee. A solid record of performance evaluations greatly facilitates legal defensibility when a complaint about discrimination is made.

Improving Overall Institutional Performance:

This is the most important reason to have a performance evaluation system. Performance expectations can be communicated to members of the team. When everyone on the team is clear on the expectations and knows exactly how he or she is performing against them, this will result in an overall improvement in Institutional success.

PEAR Model

Performance management is an ongoing process and follows a four-phase model.
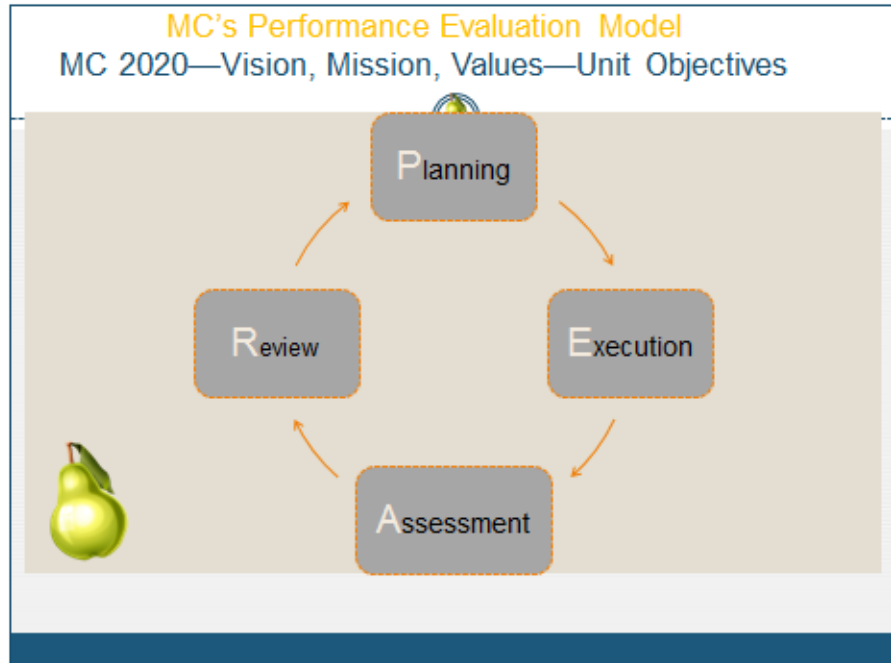
Phase 1: Performance Planning. At the beginning of the evaluation cycle, the supervisor and employee get together for a performance-planning meeting. In this session they discuss the employee's key responsibilities, goals and projects, behaviors and competencies, and professional development plans.

Phase 2: Performance Execution. Over the course of the year the employee works to achieve the key responsibilities and goals of the job. The supervisor provides coaching and feedback to the employee to increase the probability of success. The supervisor creates conditions that motivate and resolves any performance problems that arise. Mid-way through the year they meet to review the employee performance against the plans and goals discussed in the performance planning meeting.

Phase 3: Performance Assessment. As the time for the formal performance evaluation nears, the supervisor reads the employee's self-review and any feedback by colleagues that has been provided, and reflects on how well the employee has performed over the course of the year.

Tip #1: Prior to the evaluation meeting, the supervisor may choose to meet with the employee to review the self-evaluation. This meeting is an opportunity for the employee to talk about his or her self-review and for the supervisor to listen and ask clarifying questions.

Tip #2: One to two days prior to the evaluation meeting, the supervisor may print the evaluation for the employee to read in advance of the meeting to allow time for the employee to review the contents, which results in a more meaningful evaluation discussion.

Phase 4: Performance Evaluation. The form the supervisor completed is reviewed with discussion about how well the employee performed during the year. At the end of the meeting a performance planning discussion occurs, or a follow-up meeting may be scheduled.

Human Resources and Strategic Talent Management
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What is 'performance planning'?

Performance planning is the foundation of an effective performance management system. The performance planning discussion gives the supervisor the chance to talk with the employee about expectations and what is genuinely important in the individual's job. It gives the employee clear direction so he or she can do the job with full certainty that he or she is working on the highest priority responsibilities.

Key responsibilities and goals comprise the "what" of the job: results, outcomes, or deliverables. The "how" of the job represents the behaviors, competencies, or performance factors. Reviewing these will allow the supervisor and the employee to identify anything of particular importance in the individual's specific job.

Most of the work involved in effective performance planning happens in advance of the actual meeting and includes the following:

Preparation

Supervisors can prepare by first evaluating yourself! What kind of supervisor have you been? More self-evaluation questions to ask include:

1.   Do you role model the qualities you want and expect of your staff?
2.   Have you made sure all instructions have been clearly understood?
3.   Have you provided feedback all year? What was working and what was not?
4.   Have you updated goals during the year to reflect changes in work expectations?
5.   Have you made yourself available to your staff to hear about concerns, problems, and suggestions?
6.   Have you kept your staff informed about changes in the organization, which might affect the team?

Before you start to evaluate your employee ask yourself

1.   What results do I want from this evaluation?
2.   What contributions is this employee making?
3.   Is the employee working to his or her potential?
4.   What training does this employee need?
5.   What are this employee's strengths (make a list)?

Position Descriptions

It is essential that supervisors have the position description (PD) for each position he or she supervises. The position description should accurately reflect the essential duties of the employee's job noting occasional or periodic duties.

Important! The position description is the foundation of the employee's performance evaluation. It is critical, therefore, that each employee has a copy of his or her own position description. Continuously reviewing the position description for accuracy and completeness ensures that the employee is being evaluated on actual work being performed.   Position descriptions are available through the Job Wizard.

Changes to Position Description

The Job Wizard is used to update or modify a position description. Employees may view and make changes to his or her position description and then forward it to his or her supervisor for approval.   This updated and approved position description is now the official position description.

How key responsibilities and goals differ

Key Responsibility	Goal
Major, on-going responsibility of a position	Major project or activity beyond existing responsibilities
Clearly defined and detailed in the position description	A statement about a desired outcome, with one or more specific objectives, that defines in precisely what is to be accomplished within a specific time frame
Describes outcomes, deliverables: what the person is responsible for regularly producing or providing	May change to meet department priorities
Remains relatively stable over time	Requires ample time to complete
	May be used for professional development planning

Goal Plans

Every employee is required to have a goal plan as part of the evaluation.

There is a strong relationship between a successful organization and an effective goal setting process. By setting goals, specifically SMART goals, employers engage their workforce and encourage employee across the organization to focus and successfully achieve these goals together.

Strong goal alignment and goal visibility allows for quicker execution of organizational strategy by enabling management to allocate proper resources across various projects. Supervisors can focus their staff on the organization's most important goals and reduce task redundancy throughout their team.   Employees will have a greater understanding of how their efforts will serve the Institution's goals.

Types of Goals

Defining individual goals which supports unit and institutional goals and priorities is a collaborative effort between a supervisor and employee. There are three types of goals:

1. Performance Goals

Performance goals relate to the employee's role within the department and the primary responsibilities of the position. A performance goal could involve problem-solving, innovation, or implementation of some type of improvement. When developing performance goals, ask:

- What are the results that need to be achieved?

- What are the most critical tasks and activities that the employee is responsible for in his/her day-to-day role at MC?

2. Professional Growth and Developmental Goals

Professional growth and development goals answer the question: "what skills and experience do I need to continue to develop and grow my career?' Key questions to ask may include:

- Where would I like to take my career within MC?

- What are the key skills and knowledge I need to develop to be even more effective in my current role?

- What skills and knowledge can I develop to help address future needs or challenges of our group?

3. Special Projects or Special Assignments Goals

Special projects or special assignments goals are designed to achieve a departmental plan and/or to support the College's mission. This includes participation in Collegewide or inter-departmental committees and task forces. An employee may be given a special project to take advantage of his or her unique talents or background. Remember that special project may change depending on the institution's strategy and priorities. To identify possible special projects, ask these questions:

- What must be accomplished this year in order to support the College's mission and institutional goals and priorities?

- Does the employee possess special skills or experience that would be a good match for a particular initiative?

Remember, goals are reachable when:

- the individual is able to do the work;

- has the tools, resources, and access required to get the work done, and;

- expectations are well-defined and reasonable.

Effective goals are SMART Goals

When supervisors and employees know how to write SMART goals, it helps take the subjectivity out of goal setting, and ensures they have a shared set of expectations.

SMART refers to an acronym built around the key characteristics of meaningful goals, which can be very helpful in writing performance expectations that can be used to evaluate the effectiveness of work and behaviors. The real aim is to specify who, what, where, when, and why for the goals and ensured shared understanding and expectations.

All of these elements are critical for helping align goals throughout the Institution. Remember, the ultimate purpose is always to help the employee, and by extension, the institution, succeed.

The acronym may be defined as follows:

1. **S**pecific—Define specifically what you expect the employee to do/deliver. Avoid generalities and use action verbs as much as possible. The level of detail you need to provide depends on the employee and his or her experience level. For example, a highly autonomous or experienced employee will need less detail than a less confident or new employee.

2. **M**easurable**—**You should be able to measure whether the employee is meeting the goal or not. Identify how you will measure success—usually stated in terms of quantity, quality, timeliness or cost

3. **A**chievable—Make sure that accomplishing the goal is within the employee's realm of authority and capabilities. While considering whether a goal is actionable and achievable, you also need to consider the employee's total set of goals. While each individual goal may be achievable, overall, you may be assigning the employee more goals than he or she could reasonably be expected to successfully complete.

4. **R**elevant-- Where appropriate, link the goal to a higher-level departmental or organizational goal, and ensure that the employee understands how these goals and actions contribute to the attainment of the higher level goal. This gives the employee a context for his or her work.

5. **T**ime-bound – When does the objective need to be completed? Specify when the goal needs to be completed (e.g., by the end of Q2, or every month).

Choosing Your Words

There are many slippery words that are open to a wide range of interpretation when writing effective goals. It is important not to use broad or vague terms when trying to convey a *specific* instructional intent, or you leave yourself open to misinterpretation. The following chart lists some of the most common unclear words used in goals and, as well as more specific, better alternatives. Ask yourself if you could observe someone doing the behavior.

| Common Ambiguous Words	"Better" Performance Words
• Know	• Choose (or select)
• Understand	• Solve
• *Really* understand	• Write
• Appreciate	• Identify
• *Fully* appreciate	• State
• Grasp the significance of	• List
• Enjoy	• Recite
• Become familiar with	• Apply
• Become aware of	• Sort
• Believe	• Assemble
• Learn	• Adjust
• Have faith in	• Build
• Internalize	• Align
• Be happy	• Compare
• Value	• Contrast
• Acquire	• Smile
	• Use
	• Perform
	• Execute
	• Classify
	• Draw
	• Construct

Collegewide Competencies

- **Staff**

- **Administrators and Academic Department Chairs**

Individual Development Plan

Together the supervisor and employee should create a development plan and identify any resources that will be needed to complete the plan.

What is 'performance execution'?

Performance execution is the second phase of an effective performance management process. For the employee, the critical responsibility in Phase 2 is getting the job done—achieving the goals. For the supervisor, there are two major responsibilities: creating conditions that motivate, and confronting and correcting any performance problems.
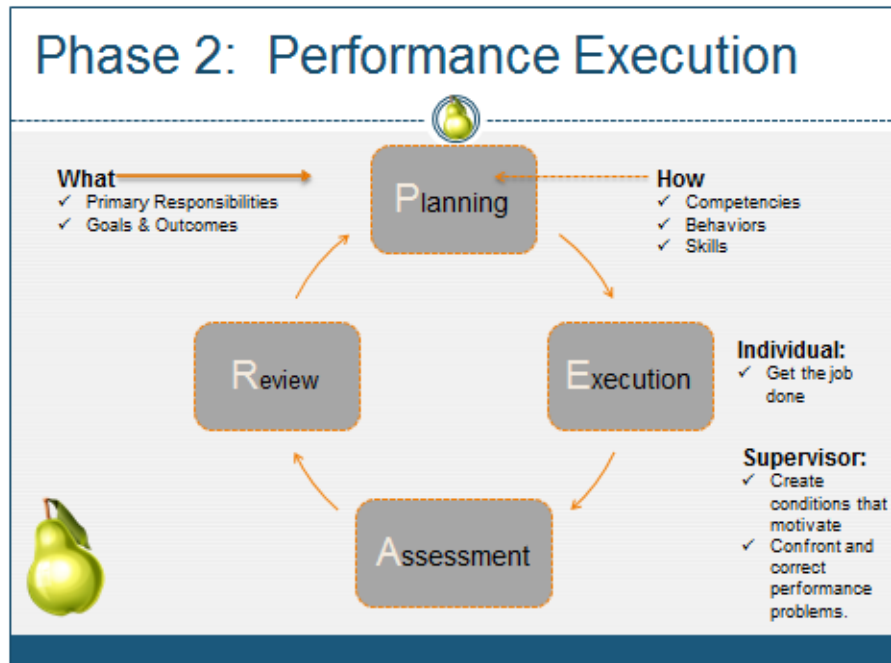
What can a supervisor do to create conditions that motivate? The supervisor can provide:

* opportunities for achievement and accomplishment
* recognition
* learning and growth
* worthwhile work

What is 'performance assessment?'

An important responsibility for supervisors is assessing and giving timely feedback to the employee on his or her performance. Feedback on performance that is given as soon as possible has proven to be the most effective. There should be no surprises for the employee if you have given feedback on a regular basis during the review year.

Phase 3: Performance Assessment
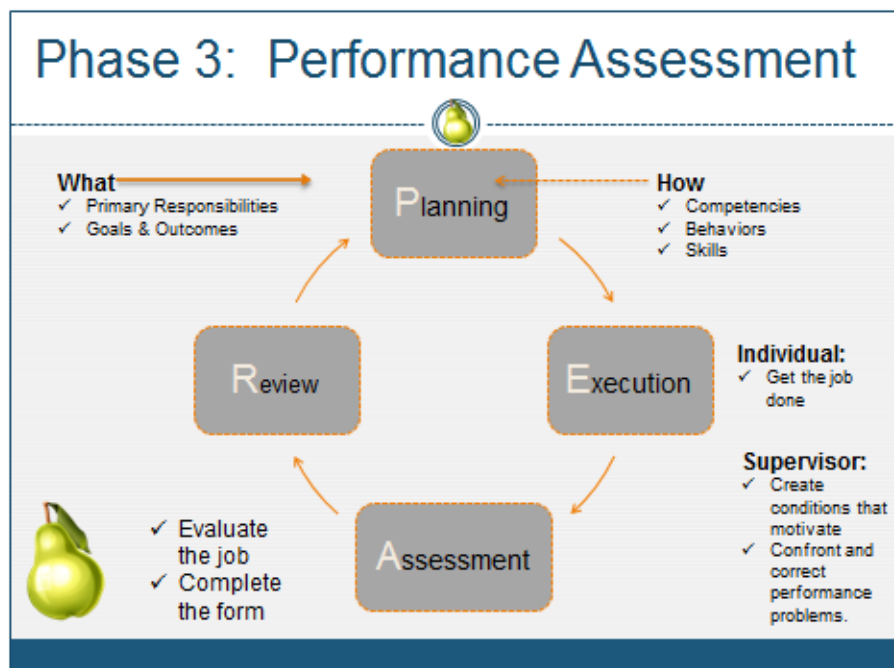
Responsibilities for performance assessment

Supervisor	Staff Member
Review • key responsibilities, goals, and competencies • self-review • notes from your observations • feedback from colleagues Schedule a pre-evaluation meeting	Review performance of your • key responsibilities, goals, and competencies Write a self-review—include: ○ accomplishments & achievements ○ feedback from colleagues, if requested Fully participate in the pre-evaluation meeting

Supervisor responsibility for performance assessment

Before meeting with an employee, it is important to review all documentation from the previous year. Review the goals that you and the employee agreed to and documented at the beginning of the year and any changes to those goals that were added or deleted during the year and recorded. Review any notes from meetings that may have occurred with the employee. Review the employee's self-evaluation, and include this as part of the documentation as well.

Employee responsibility for performance assessment

Before the meeting the employee should do the same kind of advance planning that the supervisor is expected to do. Think about what the most important responsibilities are, identify some possible goals for review during the planning session, and think about how the job performance will be measured.

Writing a Self-Evaluation

An employee's self-evaluation can be a tool to stimulate constructive dialogue regarding work performance; completing a self-evaluation is required. Writing self-evaluation encourages the employee to become engaged in his or her evaluation process by helping to establish direction for future activities and to assist in continuous improvement of the quality of service. Although supervisors are ultimately responsible for completing the ratings section, employees may

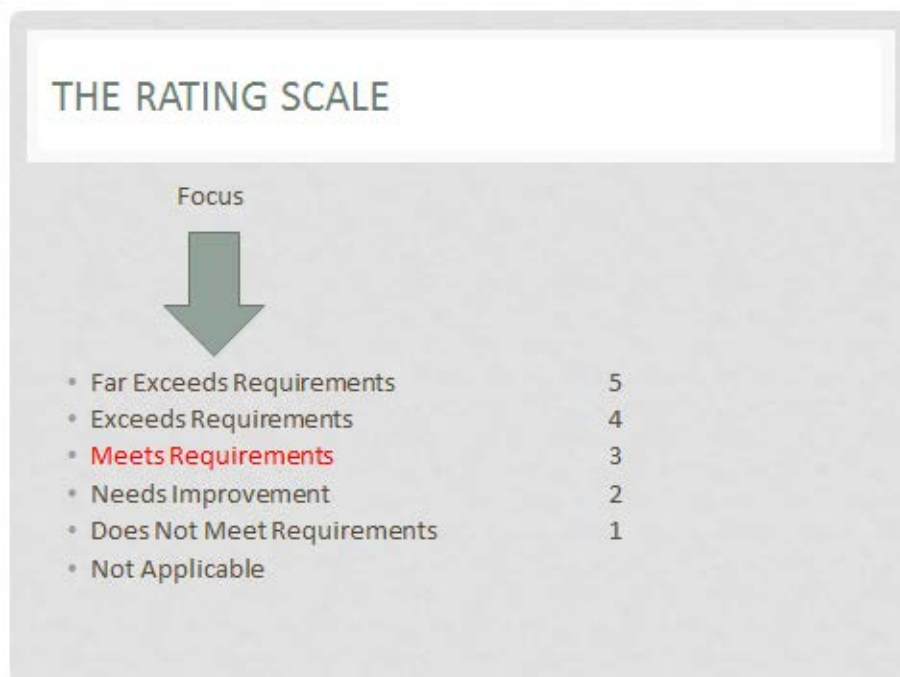provide input. An employee should submit his or her self-evaluation in advance of your scheduled meeting.

Tip: Supervisors can encourage employees to survey peers and colleagues for performance feedback using My Network in the Performance Module of the Talent Management System.

Ratings

It is the supervisor's responsibility to determine the final performance ratings.   Employees, however, may provide important input by completing a self-evaluation, ensuring involvement in their evaluation process. Employees should submit their self-evaluation advance of the scheduled meeting.

Numeric Rating of Key Responsibilities, Goals, and Collegewide Competencies

Each of the three components of an employee's evaluation, key responsibilities, goals, and Collegewide competencies, receive a numeric rating of 1 to 5. These three rating are averaged resulting in one overall performance rating.

THE RATING SCALE

Focus

Far Exceeds Requirements	5
Exceeds Requirements	4
Meets Requirements	3
Needs Improvement	2
Does Not Meet Requirements	1
Not Applicable	

Key Responsibilities

- All key responsibilities are entered into one dialogue box.
- The system does not provide an option for individually rating each key responsibility.
- Supervisors are advised to note ratings, 1 to 5, of each key responsibility either within the box or in a separate document, to ensure ratings are documented.
- The supervisor calculates the average for these resulting in an overall rating of 1 to 5 for this area.

Ratings Guide for Key Responsibilities

The following ratings definitions are intended for your use as an aid in determining performance ratings.

Tip: When writing an evaluation, use specific, concrete words such as: analyze; administer; manage; notify; operate; initiate, maintain; train; write; research; evaluate, and plan.

5—Far Exceeds Requirements: This employee far exceeds expectations, is an outstanding producer, and is extremely accurate. He or she achieves peak performance and completely understands the relationship and duties of related jobs. The employee is totally dependable in performing work, including non-routine assignments.

4—Exceeds Requirements: This employee is considerably above job standards and is a consistently above-average producer. His or her work is consistently well done, with minimal errors. The employee handles assignments with little direction or follow-up and is consistently dependable in accomplishing job assignments.

3—Meets Expectations: This employee meets all job standards. His or her output is consistent with expectations on most assignments and work is completed with a minimum amount of error. The employee fulfills responsibilities and follows instruction with minimal supervision but may require assistance on non-routine assignments.

2—Needs Improvement: Employees who are new to the position may require additional time and or assistance.

1—Does not meet requirements: This employee is frequently below standards. He or she organizes assignments poorly and work assignments seldom meet specified quantity or quality standards. The employee does not perform full scope of job responsibilities.

Goals

- Goals were previously entered in the Goals section of the Talent Management System (TMS).
- Each goal receives a rating of 1 to 5.
- The TMS calculates the average for all goals resulting in an overall rating of 1 to 5 for this area.
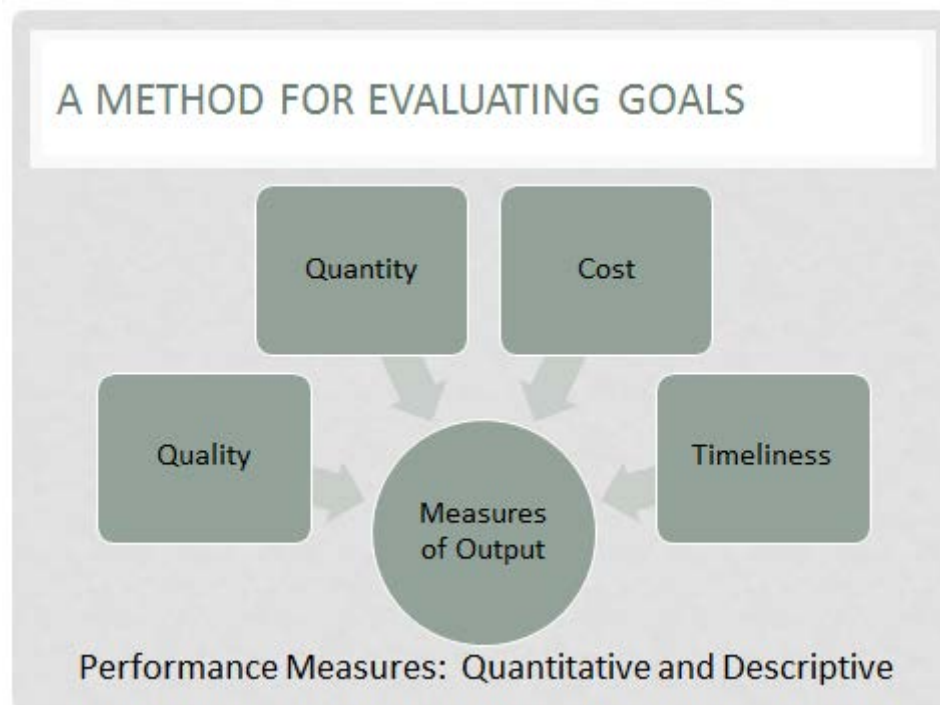
How do you determine a method for evaluating someone's performance? There are four—and only four—general measures of output:

1. Quality
2. Quantity
3. Cost
4. Timeliness

Notice the last measure is timeliness, not time. In measuring output, it is more useful to focus on timeliness—adherence to schedule, meeting deadlines—than it is to think about clock and calendar time.

There are also two kinds of specific performance measures: Quantitative and Descriptive

In determining the way the individual's goals will be measured, start by identifying which of the four general measures of output are the most important. It is likely that more than one output measure is important. That's good—the more measures you have of performance, the more accurate and valid the assessment of performance is likely to be.

The supervisor then determines how well the job has been done. What will be the sources of information? And exactly what does "high quality" mean? If the key issue is quantity, it should be fairly easy to find numerical measures that will indicate production. Numerical measures will also be easy to find when the issue is cost or timeliness.

How do you evaluate quality when there does not seem to be anything to count?

Start by looking for numerical indicators that will tell you about the quality of the performance. Remember that valid quantitative, numerical measures of quality are frequently difficult to assess.   How do you evaluate the quality of a pianist's performance? It is not the number of notes struck. Too often, the search for quantitative, numerical, countable measures of quality is fruitless, and false measures are used simply because they are easily quantifiable.

Particularly when assessing the quality of an individual's performance, the measures that are most appropriate are not quantitative but descriptive. There may be little to count, but a qualified evaluator can accurately describe the quality of the performance.

Objectivity has nothing to do with count-ability. As long as a supervisor meets the following three tests, he or she is, in fact, an objective evaluator:

1. He or she has a clear model of excellence.
2. He or she is trained and experienced.
3.   He or she acts with integrity.

It is a common mistake to think that descriptions of the quality of someone's performance are subjective unless there is some number attached.

Remember: What people really want to know is the boss's opinion of their work. They want "subjective" information, to misuse the term. They want the answers to the questions: Boss, how am I doing? Do I have a bright future here? Should I be concerned about how well I'm doing my job? Are you pleased with my work?

There are no countable measures to answer those questions. However, every supervisor who is trained and experienced, who has a clear model of excellence, and who acts with integrity can answer those questions without difficulty.

What is 'performance review?'

Performance review is the final phase of an effective year-long performance management system. It involves the employee and the supervisor discussing the performance evaluation document that the supervisor has completed.
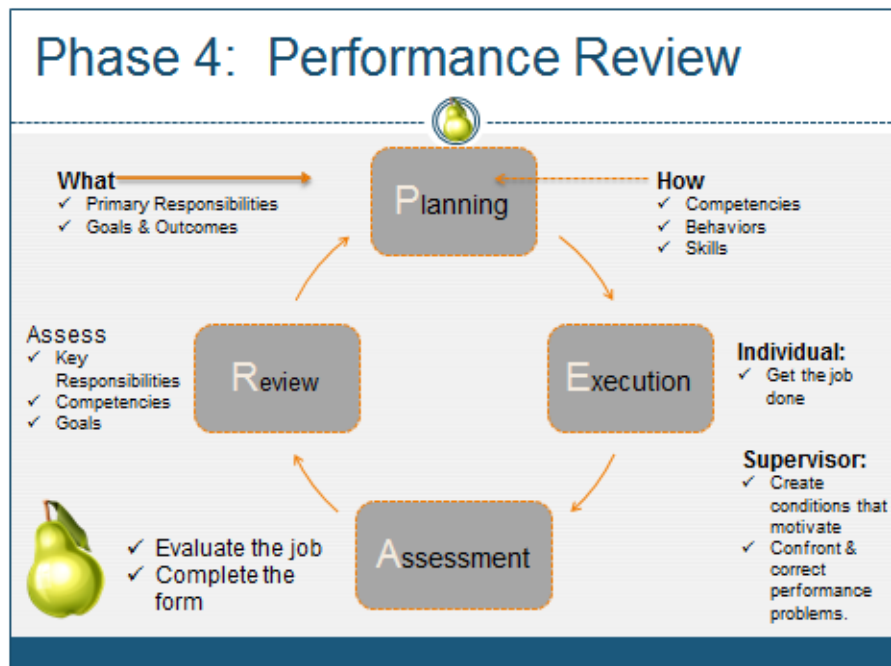
Appropriate setting

- Decide on the best time of day and schedule more time than you think will be necessary.
- Decide on the best place—it should be private, comfortable, preferably a conference room—not the supervisor's office.
- Give the employee you are evaluating advance notice of the meeting.
- Start on time and guarantee no interruptions.
- Gather all of your information and materials.

Tip: One to two days before the evaluation meeting, give the employee access to the evaluation. This will allow the employee to be better prepared with questions and comments at the evaluation meeting.

Delivery

Deliver the performance evaluation in simple language. Don't use jargon or mince words. Tell the employee what he or she has done well and where he or she needs to improve.

Encouragement

Your job is to encourage! You want to motivate the employee to continue doing that which he or she does well and to improve in the areas where there is room for growth. This is the best way to make these meetings productive and positive. Even if the person's evaluation has not been as high as he or she might have hoped, remind the employee that he or she is still valued and that you will support him or her in this development.

CASE STUDY

You are Margaret's manager and are about to prepare her annual performance evaluation. You have her position description, your observations and notes and, her self-evaluation. Please read and prepare your evaluation and rating for her key responsibilities, two competencies, and one goal. You will share your evaluation with others and compare ratings describing how you arrived at your decisions.

CASE STUDY: Position Description

Position Title: Administrative Aide II
Position Working Title: Administrative Aide I
Class Grade: G

Key Work Responsibility 1: To perform support and clerical duties for the office. 35%

List of Duties:
- Receives, screens, and refers telephone calls; queries callers and transfers or refers calls to appropriate staff or other offices; uses knowledge of office operations and activities to respond to inquiries and to assist callers.
- Receives and assists visitors to the office; queries visitors and directs them to appropriate staff or offices; answers visitor inquiries regarding office operations.
- Provides exceptional customer service to those contacted in the course of work; and resolves routine customer service issues.
- Produces a variety of documents, such as letters, memoranda, forms and/or reports; transcribes oral and/or machine dictation, or types copy from drafts; proofs and edits typed materials for accuracy of grammar, spelling, punctuation, and format and makes corrections; and ensures adherence to established style guides and formats.
- Composes correspondence, memoranda, and reports in response to recurring inquiries and as deems appropriate.
- Attends meetings and takes verbatim or summary notes; and transcribes notes and prepares and distributes minutes.
- Reviews forms and documents submitted to the academic or administrative department and verifies information, performs necessary calculation or coding, and enters data into manual or electronic systems.
- Assists in planning meetings and events, including arranging location, food service, and equipment.
- Sets -up and maintains files for the office's project.
- Tracks appointments to the office.

- Receives, screens and responds to e-mail inquiries; queries contacts and transfers or refers contacts to appropriate staff or other offices; uses knowledge of office operations and activities to respond to inquiries and to assist contacts.
- Maintains minute records and follows up on decisions and actions taken at meetings.
- Represents the office at committee meetings, work groups and other events as assigned.

Key Work Responsibility 2: To ensure the database management system is accurate and maintained. 30%

List of Duties:
- Creates updates and maintains manual and electronic files and records; and ensures confidentiality of files and records by controlling access and release of information.
- Collects, organizes, records and verifies accuracy of data and information for databases.
- Records and reports; compiles and tabulates data into lists, summaries, tables and charts.
- Researches records and other sources to obtain information for reports and other purposes.

Key Work Responsibility 3: To provide support and assistance to visitors, the unit team, and the College. 20%

List of Duties:
- Opens, screens, and routes mail; directs items to other staff or units of the College for appropriate action or response.
- Tracks and monitors office supply inventory and arranges for replenishment of items as necessary.
- Generates and submits requisitions, purchase orders and online purchase requests for supplies, equipment and instructional/promotional materials as necessary.
- Manages office's web pages, which may include adding, modifying, or removing content as to reflect the office's programs and operations.
- Ensures compliance with established policies and procedures regarding office services, College protocols, and administrative requirements.
- Updates and distributes promotional materials (flyers, brochures, postcards and electronic/social media) to a wide audience including community based organizations, local, state and regional leaders and agencies; higher education officials.
- Monitors and distributes incoming fax materials.
- Maintains ownership records for office equipment (fax machine, copier and printers).
- Maintains/calls for service of office equipment and software.

Key Work Responsibility 4: To manage and maintain administrative and financial files. 15%

List of Duties:
- Establishes and maintains manual and /or automated financial, accounting, personnel and other administrative and management files and records; ensures confidentiality of files and records and uses discretion in controlling access to and release of information.
- Perform related work as required.

Section II
Working Relationships:
Listed below are the titles of people or groups (e.g., boards, commissions, committees) inside or outside the organization that you regularly contact as a part of your job. Do not include your supervisor and employees you may supervise.

Regular Dealings With:	Frequency:	Purpose:
Workforce Development and Continuing Education	Regular	Non Credit Classes Information Room Reservations
Office of Information Technology Service Desk	Regular	Hardware and Software Support
Admissions and Enrollment Management	Regular	Admissions Inquiries and Updates
Facilities	Regular	Maintenance Service Requests Room Reservations
Media Services	Regular	A/V Equipment
Accounts Payable	Regular	Requisitions, reimbursements and accounts inquiries
Procurement	Regular	Special Purchases Requests, MC logo stationary and inquiries
Security	Regular	Room access, parking, report suspicious activity and escort
Heiberg Consulting Inc.	Regular	Student Access Service Contract
Rudolph's Supply	Regular	Office supplies
Maryland Department of Labor, Licensing and Regulation	Regular	GED Information
U.S. Department of Education	Regular	Financial Aid Publications Annual Performance Review
Balmar	Regular	MC logo stationary
Community Based Organizations (Partners)	Regular	Referrals Workshops and information dissemination
Channing Bete	Regular	Promotional Publications

Pearson	Regular	Career Assessment Materials
Educational Testing Service	Regular	GED Testing Materials
ABC Associations DEFGH, IJKLMNO, PQR	Regular	Professional Development
4 imprint	Regular	Promotional Items

Comments and Clarifications:

Working Conditions:
Describe any dangerous conditions, unusual physical demands, and/or unpleasant working conditions connected with your job and how these affect you.
N/A

Physical Requirements:
Indicate any physical requirements of the job, such as significant and unusual walking, lifting, climbing, bending, kneeling, stooping, crawling, reaching, handling, standing, pushing, and pulling. (Specify lbs. lifted)
- The office environment typically involves normal safety precautions with limited risks. There are some heavy and unusual physical demands such as lifting objects that weight between 20-50lbs. The administrative aide is required to handle, obtain, and pull files for inquiries and stow them away. The use of a stool assists the administrative aide with pulling, pushing and reaching documents that are out of his/her reach. Mainly, the nature of the job requires flexibility of these daily tasks.

Machines, Hardware/Software Tools, etc.:
Machines, Hardware/Software Tools, Chemicals and Equipment Used: List types or names and indicate per cent of time spent on each. Percents need not total 100. Identify the items for which you are assigned maintenance responsibility.
- Student Access (50 %)
- Real Time Database (15%)
- Microsoft Office, Acrobat, Outlook, Banner Finance (20%)
- Fax machine, copier, scanner and printers (10%)

Administrative Aide has assigned maintenance responsibility for the hardware and software listed above.

What is the most complex part of your job?
The most complicated and difficult part of my work is to deal with the behavior of an individual. In a way to solve criticism and negativity of each individual situation behavior differently; therefore, I handle patiently and tactfully.

Impact:
Describe how the work you do helps your organization (division, department, etc.). In what ways can your work performance improve operation, for example, increase effectiveness of services, reduce or control costs, or prevent losses?

- The nature of my responsibility is to apply judgment. Scrutinize participants on the telephone or in person by asking them questions of residency and actual legal status helps my department to increase effectiveness of services and reduce the cost of time. It is important for EOC to have eligible participants that meet program requirements in order to comply with the rules and regulations.

What kind of errors or mistakes can occur in your position?

- Some of the common mistakes that may occur in my position are when participants do not provide accurate personal information on the Confidential Intake Form.

What are the probable results of such errors or mistakes?

- The probable results of such errors and/or mistakes would be having invalid information from the participants.

How are such errors or mistake prevented or corrected (e.g., review by supervisor)? Are there written guidelines or rules you are required to follow in these areas?

- These errors and/or mistakes can be prevented by having the participant provide the correct information when completing their Confidential Intake Form. The guidelines I must follow are the following: review, verify, and validate all entries before entering them into the system. This would eliminate any falsified information.

Section III
Qualifications: Minimum Education:
Indicate the level of education that a person would be expected to have in order to qualify for the position (that is, performance on the first day of work). This education can be acquired through home study, special courses or in ways other than the usual academic process. The level required, however, should be expressed in terms of years of academic study and degree in order to provide a uniform basis for analysis. (If education beyond the minimum required is considered desirable but not essential, enter the additional amount but indicate that is not part of the basic requirement).

- The position requires graduation from high school, or a G.E.D. and the ability to type 40 wpm. An associate's degree or a clerical training program certificate is preferred.

Qualifications: Specialized Training Programs, Licenses, etc.:
Identify required special courses during formal education, as well as through additional specialized training, that are considered essential to qualify for the position. Also identify any special licenses (operator, chauffeur, and so forth) or certificates required.

- N/A

Qualifications: Minimum Work Experience:

Identify the occupations or fields of specialization in which experience, if any, is needed in order to qualify an individual for the position. Also enter the minimum desirable amount of such experience, expressed in years.

Kind of Experience:	Number of Years:
General office experience performing secretarial duties.	2
Experience with reconciling financial records.	2
Experience with Banner SCT is preferred.	2
Experience with web page development and maintenance.	2

Qualifications: Required Knowledge, Skills, & Abilities:

Please specify any minimum KSAs required (e.g., ability to communicate orally and verbally, etc.).

- Thorough knowledge of the responsibilities of the EOC project.
- Thorough knowledge and application of proper grammar, punctuation and spelling in English and Spanish.
- Thorough knowledge of office management principles and practices, and computer software packages utilized by the College.
- Ability to take initiative and follow-through on projects.
- Ability to respond quickly and effectively to ever-changing and complex situations.
- Ability to work with a culturally diverse staff, populations, and community.
- Ability to work independently with little or no supervision.
- Must be a self-starter and a team player, possess above average organizational skills, excellent interpersonal, oral and written communication skills and the ability to prioritize.
- Fluency in written and spoken Spanish.

Case Study: Background and Observations

Margaret is an administrative aide II for a college-wide service department at MC and has been in this position for about 10 years. During her tenure, changes have occurred in technology and the unit has moved buildings. In addition, her supervisor and some colleagues have changed due to resignations, retirements, and transferring to another unit as a promotion. She is one of the more long-lived staff members and holds quite a bit of institutional and department history in her memory. You have been her supervisor for three years and have conducted two performance evaluations with her.

During this past year you have noticed that Margaret has been offering more drafts of e-mails that you need to send and office publications than in the past. They have been well-written and succinctly capture the message you need to give to others. In addition, the publications have been created in English and Spanish. While you do not speak Spanish, you assume that it is well-written and grammatically correct to parallel the English version. Just last week, Margaret developed a new publication that she felt would assist the office's outreach to students and it seems at a quick, first-read that it is a novel idea that has potential benefits and nicely combines some of the information from several disparate brochures. It seems odd that other brochures from the past continue to be displayed in the reception area and no updates have been made to them.

Your office was fortunate to have some surplus funds that allowed you to purchase a few new pieces of furniture and a new coffeemaker and microwave. Margaret researched these options, made a recommendation presentation at the staff meeting showing price comparisons and the group supported her efforts. Now everyone is more comfortable and office morale has increased with being able to have fresh, K-cup coffee whenever they want.

Twice this year, you saw Margaret leaving for lunch and her computer screen was displaying confidential information. Given her work space is in an open area, you were concerned that internal office staff could view the data. Of course, IT has a setting that makes the log-in screen appear after a period of inactivity.

Staff members have reported to you that routine data reports produced by Margaret had several errors each time and they have not been corrected. However, the special report you asked her to develop that compared data from past years was excellent and may help your unit expand its offerings based on the growth trends shown.

Margaret takes minutes for at the staff meetings, a special project team you chair, and also for one of the governance councils where she serves as secretary. The staff meeting minutes are often done the morning of the next meeting and your staff complains since they can't receive them in time as a reminder of what they are supposed to complete before the next meeting. The special project team receives their minutes within two days of the meeting and they are complete and well-organized. You don't know about the governance council meeting minutes but are aware that a special format exists so that all council minutes are consistently formatted.

You are aware that Margaret is the first person visitors see and speak to in person and on the phone. She seems to do a good job because you don't hear any complaints but you do notice that each customer encounter is handled very quickly. You don't know if she is efficient or just responding to the specific question asked and not more.

You are beginning to prepare Margaret's performance evaluation and while you think Margaret is an asset to your office, there are areas for improvement. What concerns do you address? How do you draft the remarks? In what area do you record your remarks? What rating do you assign her?

Case Study: Self-evaluation

Margaret has prepared her self-evaluation which follows.

PRIMARY WORK RESPONSIBILITIES
Respond to what Margaret wrote his or her accomplishments this year that met the various listed items in the position description. Use the rating criteria found in the resource manual.

Supervisor Comments:	Employee Comments:
	I support the office by providing clerical assistance, data entry and database management, office outreach, and management of the administrative and financial files.
	Specifically, I typically handle 15 to 18 phone inquiries and about 10 visitors (mainly students) daily. I produced 10 sets of staff meeting minutes, and 10 governance council meeting minutes. This year also required me to produce 8 special project committee meeting minutes. The database has been kept to-to-date and 24 bi-monthly reports have been produced. I keep the office stocked with supplies and added new pantry equipment this year. The office Website required much time to update and change given the reorganization. I balanced the budget and recommended items for purchase with a small surplus. I also created a new publication for the office that combined several old brochures into one and translated it into Spanish. With all this, I also maintained the front office

	operations for the department.

Rating:

☒ 5 – Far Exceeds Expectations
☐ 4 – Exceeds Expectations
☐ 3 – Meets Expectations
☐ 2 – Needs Some Improvement
☐ 1 – Does Not Meet Expectations

COLLEGEWIDE COMPETENCIES

Two of Margaret's competencies are listed below with her comments and ratings.   How would you respond and what rating would you give using the rubric for guidance? You will be asked to share your comments with a small group and the ratings given and the supporting reasons.

Competency: **Initiative/Innovation**	Rating: **5**
Supervisor Comments:	*Employee Comments:* I created a new office publication that merged information from three separate brochures into one cohesive brochure. This effort eliminated duplicate data and included new services we offer with the reorganization. I also took the initiative to translate it into Spanish and had it proofread by a faculty member who teaches the language (it came back with only two word changes!). I hope you are pleased since I didn't hear any feedback. I am also proud that in managing the financial records I was able to find enough money for three new desk chairs and a new coffee machine that allows everyone to brew a cup of coffee they like at the time they want. It has reduced waste and having pots warming all day and burning at times. I was happy that the staff supported my recommendations. I also want to note that the special project committee meets so frequently that I have taken the initiative to make sure that the minutes are published within two days so the important committee work can continue

	smoothly and on-time. This new effort is so exciting with possibilities! I hope you are happy with my work to support your success.
Competency: **Quality of Work**	Rating: **3**
Supervisor Comments:	*Employee Comments:* I think my work is complete and accurate. I do acknowledge that my staff meeting minutes are done barely in time. It has become such a routine and the outcomes don't often have follow up work so I have delayed getting them done. Instead, I have put my time to the special projects committee and the governance council. In all other aspects of my work, I believe I do a good job and want to produce quality work. I balanced the budget. Visitors concerns have been handled quickly and correctly especially with the new brochure that answers many of their concerns. This year of reorganization has just caused me to fall behind in one area and I hope to correct that next year.

GOALS

Use the comment box to explain how you met/did not met your goals. Use the criteria of quality, quantity, cost, and timeliness to help quantify your explanation and explain your rating.

Did you meet your goal as written? **Yes** or no

What did you do to meet or surpass your goal? If not met, what occurred that prevented you from meeting the goal?

Goal: To increase my knowledge of how the Spanish-speaking employees at MC keep informed of the various services, programs, and benefits.	Rating: 5
Supervisor Comments:	*Employee Comments:*

	I attended In Their Own Voices on September 18 in celebration of National Hispanic Heritage Month. It was motivating to hear how employees use the services MC provides them to move up in their jobs and it inspired me to translate the brochure I created. I used my knowledge to also distribute the brochure to key locations within MC for these employees. I also participated in the Chinese New Year celebration with the Chinese Students Association. It was a lunch program that offered foods and a fashion show with a question-and-answer portion later. I learned about the historical development of Chinese fashion and how symbolism is used in the fabric design.