

Examples of Actual Performance Expectations Statement

An effective performance expectations = action verb + deliverable + qualifier + specification of a date due.

For example, "Resolve all citation appeals received on/before July 19, 2002 by August 19, 2002." or "By July 31, 2002, develop a revolving account reconciliation schedule to ensure timely distribution of reconciled information to principle investigators."

The following are a few examples of actual statements of performance expectations which may provide ideas and information about what other supervisors have created. While it is recognized that many of the actual expectation statements cited do not conform with the recommended formula, it is anticipated that in subsequent evaluations the expectations will be modified to more comprehensively communicate what is expected of an employee. Further, these are actual submissions and are not presented as model statements.

Attitude

- Demonstrates poise, maturity, positive attitude, & self-confidence in the accomplishment of tasks & communication w/others
- Accepts suggestions for improving quality of work & develops & implements appropriate plans for action to enhance effectiveness
- Projects and demonstrates respect, consideration, and professional bearing toward customer personnel
- Courteously deals with other staff and the general public
- Willing to take on new approaches and additional responsibilities

Customer Orientation

- Consider the customer...what is their perspective, what is their understanding? Hence, what kind of advance warning to give them? Nature of memo to write.
- Develops recommendations and plans of action on customer's integration, application, and use of technology
- Effectively applies knowledge and skills to individual circumstances of the customer/needs of the operating unit
- Demonstrates knowledge of customer's business, needs, and expectations
- Responds to customer's needs in a customer-service oriented manner
- Meets customer needs and provide services beyond customer's expectations

External Relations

- Establish contacts, develop relationships and evaluate opportunities with media to support UH initiatives including recruiting, funding, and expansion.
- Establish/Maintain active membership/presence with local community groups.
- Facilitates the involvement of the public relations and special events office in different areas and programs to increase media coverage.

Fiscal

- By the last day of each month, have entered into the AMHD BHIS program 80% of the staff's daily appointment logs. Advising and educating staff on errors made in billing codes as they occur.
- Achieve 90% efficiency in the proper and timely submission of travel, vacation, and purchase documents. Prepare fiscal & administrative documents with minimal supervision.
- Prepare reconciliation of University of Hawaii Foundation fund balance reports on a monthly basis and prepare UHF account summary spreadsheet on a monthly basis.
- Review and ensure fiscal documents are correct and in compliance with federal, state or UH regulations. Daily review during the rating period.
- 80% accuracy on all fiscal documents pre-audited within a 24-hour period regardless of funding. Pre-audited documents will be reviewed and logged as correct or incorrect. Judgment errors will not count as incorrect.

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- By May 2002, complete ATM specifications for request for bids for new bank machine in Campus Center
- Complete investment reconciliation within 15 days after month-end.

Initiative

- "Own" assignments. Take initiative; be proactive; think "what if" Anticipate and complete projects in a comprehensive manner...remember the details. Think through who in OHR is impacted...who needs to know.
- Aggressively enhance & promote image of College & its ohana, including students/faculty/staff/alumni: via creative use of professional networks, development of attractive & well-written materials & vibrant website, & support for high-impact College events.
- Prioritize work assignments during high volume PNF processing times to decrease corrections on a quarterly basis.
- Show initiative in dealings with principal investigators, project staff and other grants management staff by providing helpful advice, encouraging open communication and contributing useful solutions to difficult problems whenever possible.

Judgment

- Interpret/apply applicable laws, policies, rules, and regulations
- Resolve publications production problems over and above those normally handled by subordinates by determining cause and most reasonable solution in an effective yet timely manner.

Leadership

- Manage local exhibits and outreach programs efficiently to disseminate information about Press books, seek out new opportunities to increase public awareness and sales, and represent the Press in the Hawaii Book Publishers Association (HBPA).
- Manage all aspects of book catalogs and other direct mail. Streamline the catalog production process, maintain schedules, and create catalogs/direct mail which will result in increased sales.
- Manage all aspects of the design and production department, including design, typesetting, printing, binding, and shipping of books to UH Press warehouses.

Oral and Aural

- Communicates and understands instructions
- Demonstrates effective oral expression when presenting ideas or tasks

Professionalism

- Remains up-to-date on industry trends and developments and best practices in field of expertise
- Provides leadership or assistance to others in using/understanding information services technology
- Suggest and explore new ways to improve efficiency or reduce costs in journal production.
- Apply problem-solving techniques: identifying problems/issues; collect pertinent data/references; check with colleagues; brain storm possibilities; recommend alternatives.

Responsibility

- Ensures that required reports and other deliverables are submitted in accordance with established schedules
- Improve public relations for the school. Measured by the number and quality of communication pieces developed (e.g. news faxes, newsletter, media releases, brochures, website).
- Identify target markets and discuss market strategies with authors and others.

Supervision

- Provide training/supervision of fiscal and personnel matters to other project administration.
- Supervise and train student or clerical assistants to provide processing of various fiscal or personnel documents required within the University system
- Supervise student help who updates the website on a weekly basis
- Supervise the daily collection, recordation and deposit of tuition and fee revenue, including tuition waiver, refund, third party billing and financial aid transactions. Make corrections as necessary.

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Teamwork

- Work as part of a team and places its success and accomplishment of project goals above that of self
- Initiates and coordinates efforts with other departments, staff, and peers

Technical Skills Application

- Demonstrates knowledge and use of technology to improve services and operations
- Create technical drawings based on rough drafts and content as follows: 1 to 2 days for each simple product; 3 to 7 days for each complex product; 8 to 14 days for each highly complex product

Work Performance

- Prepares mathematical equations in manuscripts as follows: 1 to 5 minutes for each simple equation; 5 to 10 minutes for each somewhat complex equation; 10 to 30 minutes for each complex and/or lengthy equation
- Strive to keep journal production on schedule and on budget while maintaining high production standards.

Written or graphics

- Prepares clear and concise letters, memos, and reports
- Prepares scientific tables in manuscripts as follows: up to 1 hour for each simple table; 1 to 8 hours for each somewhat complex and/or lengthy table
- Reliably make all edits to all publications and web site by upholding quality control, even in rush situations
- Edit, to professional standards, scientific and technical papers and proposals for institute faculty with turnaround of 24 hr for short documents and 48 hours for long documents.
- Tell the College's story to print, electronic and other media via effective outreach to various media sources and the preparation of timely, entertaining and informative press releases and supplemental materials.
- Prepare and produce reports and informational and publicity material for the Center's Biography Hawai'i: Five Lives public presentation series, Fall 2002 Brown Bag Biography lecture series, and co-produced Biography Hawai'i television documentary series
- Prepares draft reports, memos, letters, position papers which demonstrates a good grasp of the issues