

## Clarifying Expectations

This template can be customized and aligned to your team goals and departmental expectations. Be sure to communicate these expectations verbally as well as in an email follow up.

The language used here can be used throughout the year and during annual performance reviews when you are:

- Recognizing your staff for when they meet/exceed the expectations
- Holding staff accountable when you need to correct behavior that is not meeting these expectations.

| Performance Factor               | How You Define Excellence for This Factor   |
|----------------------------------|---|
| Job Skills /<br>Technical Skills | <ul style="list-style-type: none"> <li>• Understands job, has the expertise to perform and seeks assistance when needed.</li> <li>• Is considered a subject matter expert people go to for advice and assistance.</li> <li>• Possesses a clear vision of process as well as of the final objectives for each job task.</li> <li>• Anticipates change and keeps current on tools, technology, and information needed to meet new challenges.</li> <li>• Effectively implements new tools, information and approaches in production of consistently high quality work.</li> </ul> |
| Communication                    | <ul style="list-style-type: none"> <li>• Freely shares information and ideas in an open, consistent, and effective manner.</li> <li>• Engages in active listening and has the ability to empathize with others.</li> <li>• Seeks feedback and provides it constructively to all team members and management.</li> <li>• Willing to resolve conflict and uses conflict situations to create better working relationships and solution.</li> <li>• Uses email appropriately, keeping others informed and being clear about what is needed.</li> </ul>                             |
| Meetings                         | <ul style="list-style-type: none"> <li>• Creates agendas and carefully determines appropriate content and audience.</li> <li>• Starts on time, tracks action items and ends on time.</li> <li>• Avoids meetings unless necessary.</li> </ul>  |



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| Customer Service                                | <ul style="list-style-type: none"><li>• Understands our customers and takes responsibility to reflect their diverse needs in the work we do.</li><li>• Handles customer questions and concerns with a sense of urgency.</li><li>• Actively seeks customer feedback and explores creative approaches to enhance service and increase efficiency.</li></ul>  |
| Productivity<br>(Quantity/Quality<br>of Output) | <ul style="list-style-type: none"><li>• Is able to get the job done and willing to step up to new challenges.</li><li>• Sets priorities and organizes work efficiently and effectively. Knows how to manage multiple projects and balance workload. Sets deadlines for all projects and tracks progress.</li><li>• Delivers high quality work products</li><li>• Consistently “prepared” in terms of ability to organize work efforts and anticipate needs, issues and concerns.</li></ul>   |
| Project<br>Performance                          | <ul style="list-style-type: none"><li>• Creates a plan for each project and manages to the plan.</li><li>• Demonstrates accountability for the project regardless of the issues that arise outside of his/her control.</li><li>• Proactively works issues and keeps management informed of schedule, budget, or other major issues.</li></ul>  |
| Teamwork/<br>Collaboration                      | <ul style="list-style-type: none"><li>• Contributes to the success of the team by working effectively, helping solve problems, and meeting deadlines.</li><li>• Builds trust with staff and coworkers across organizational and functional boundaries.</li><li>• Offers to help others when they need it.</li><li>• Willing to take on extra work if a colleague has a major project deadline and needs assistance.</li><li>• Seeks the input of others to ensure projects/events are organized in a way that will meet the needs of a diverse population.</li></ul> |
| Problem Solving                                 | <ul style="list-style-type: none"><li>• Breaks complex tasks into manageable parts.</li><li>• Identifies the most important issues and gets enough information to verify or negate assumptions.</li><li>• Gathers and analyzes relevant information systematically and plans a course of action.</li><li>• Condenses data to a useful, understandable, relevant level.</li><li>• Identifies the benefits, drawbacks, and probable outcome for each proposed solution.</li></ul>  |



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| Change and Agility        | <ul style="list-style-type: none"><li>• Effectively deals with change situations and shifts gears comfortably.</li><li>• Is productive and can move forward on work efforts without having all the information and facts.</li><li>• Doesn't get irritated or upset when issues arise that cause challenges in getting work done.</li><li>• Is able to comfortably handle risk and uncertainty when working projects.</li></ul>   |
| Creativity and Innovation | <ul style="list-style-type: none"><li>• Develops new insights into situations and applies innovative solutions to make organizational improvements.</li><li>• Fosters an environment that encourages creative thinking and innovation.</li><li>• Resourceful when challenged by obstacles.</li></ul>   |
| Leadership                | <ul style="list-style-type: none"><li>• Serves as a role model for others.</li><li>• Inspires respect and trust; fosters a culture that has high standards of ethics.</li><li>• Reacts well under pressure; maintains focus and intensity and remains optimistic and persistent in the face of adversity. Recovers quickly from setbacks.</li><li>• Takes a long-term view and acts as a catalyst for organizational change, building a shared vision with others. Influences others to transfer vision into action</li><li>• Persuades others. Can build consensus through give and take; gains cooperation of others to obtain information and accomplish goals.</li></ul> |

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| Performance Factor                              | How You Define Excellence for This Factor |
|---|---|
| Job Skills /<br>Technical Skills                |   |
| Communication                                   |   |
| Meetings  |   |
| Customer Service                                |   |
| Productivity<br>(Quantity/Quality<br>of Output) |   |



| Performance Factor        | How You Define Excellence for This Factor |
|---------------------------|---|
| Project Performance       |   |
| Teamwork/Collaboration    |   |
| Problem Solving           |   |
| Change and Agility        |   |
| Creativity and Innovation |   |
| Leadership                |   |