Performance Objectives Counseling Form

Name of Employee:

Performance Period: 07 March 2012 – 06 March 2013

Employee’s Duty Position: Recreation Assistant Outdoor Recreation; NF-0189-03

Salary range: $13.51 to $16.00

Rater’s Name and Position: Supervisor Finney

1. Primary Duty Description:

Serves as an Outdoor Recreation Assistant, providing service to a variety of customers renting all types of outdoor equipment throughout the year. Assists in planning/establishing objectives and goals for Outdoor Recreation Program. Works with other Family and MWR staff to plan and implement activities and programs. Helps plan, conduct, publicize, and arrange support for a variety of sponsored special events, social activities, tournaments and related functions. Issues/receives recreational equipment to authorized users. Collects applicable fees for items issued, accounts for monies, safeguards funds and makes daily deposits. Instructs customers in proper use of equipment. Cleans and performs minor maintenance on facility equipment.

1. Top three duties/responsibilities:

* Cashier-Check-out Functions
* Maintaining and Repairing Equipment
* Providing Excellent Customer Service

1. Performance goals for the evaluation period.

**Customer Service:** Consistently model high level of service excellence identified in C.U.S.T.O.M.E.R. service standards. Immediately take appropriate action to address customer complaints. Consistently use Smart Book to provide accurate and up-to-date information about all available Family and MWR activities and programs.

To exceed: Use customer feedback data to continuously plan, provide, and improve products and services; substantiate resulting improvements.

**Continual Learning:** Research community and industry trends in Outdoor Recreation and provide quarterly summary with recommendations for incorporation or inclusion in garrison program to anticipate customer demands. Complete all training on approved Individual Development Plan (IDP) located in [www.imcomacademy.com](http://www.imcomacademy.com) and improve at least one skill/ability and substantiate improvement. Maintain technical proficiency on the use of Outdoor Recreation equipment.

Exceed: Coach/train seasonal staff on proper use and maintenance of seasonal equipment in inventory.

**Teamwork/Family and MWR-Delivery System**: Working as a member of a Family and MWR team, contribute to team effectiveness by the following actions and substantiate contributions: Promote and build team continuity and cohesiveness, clarify the common goals and interdependencies between team members, regularly contribute ideas on projects /assignments, confront performance problems of the team, share wins and successes. Collaborate with partners from all Family and MWR programs/activities to ensure a seamless customer and team experience.

To exceed: During the rating period, lead a team to the plan, develop and execute a program using the Family and MWR Delivery System process; substantiate results.

**Cashier-Check out functions:** Use approved procedures and management information systems to collect and safeguard program funds. Use RecTrac to collect payment by cash, check or credit cards; at end of shift closeout, experience no more than one (1) error (shortage or overage) per performance year. Use RecTrac reports to reconcile drawer accounts and to assist in the preparation of the Daily Activity Report (DAR) in accordance with established procedures and AR 215. Restock and secure stock at the close of business.

To exceed: At the end of shift close out, experience no errors (shortages or overages) per performance year.

**Equipment Rental/Maintenance**: Maintain and rent Outdoor Recreation equipment in safe, useable condition. Adhere to and follow prescribed maintenance standards for assigned equipment. Repair equipment, as needed, according to the repair specifications; if unable to repair on site, report major repair requirement to supervisor as soon as identified. Instruct customers on proper use of rental equipment. Inspect equipment upon check-in for damage, maintenance and repair. If equipment returned in good condition with no damage, clean and return to inventory in timely manner.

To exceed: Provide input to budget on reasonable number, specifications, and costs to replace existing or purchase new types of equipment necessary to maintain high level of service and outdoor recreation opportunities for customers.

Policy on use and non-disclosure of personal information must be followed with no instances of inappropriate use or disclosure.

4. Signatures and date:

Rater:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Ratee:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date:

Quarterly Counseling Sessions

*1st Quarter Feedback on Performance/Goal Achievement:*

**Customer Service**: ICE comments continue to verify excellent customer service skills and positive attitude. Offer steps in to assist other staff solve customer service complaints.

**Continual Learning**: IDP includes: Customer Service Refresher course; mandatory training; Applied Financial Planning; Ski Maintenance Machine Repair; CES Foundation.

**Teamwork/DS**: Appointed to lead Family and MWR team to use delivery system process to increase customer focused programming, specifically for Wounded Warrior Families. Team consists of reps from SFAC, CYSS, ACS, LTS and organizations from the local community and ski resorts.

**Cashier/Check-out:** Success with Rec Trac continues. No errors this period. Trained new staff to use Rec Trac.

**Equipment Rental/Maintenance**: Recommended purchase of cooking and table wear packs to meet customer need. Researched costs and specifications for adding to budget.

*2nd Quarter Feedback on Performance/Goal Achievement:*

**Customer Service**: Always friendly with customers and greets many by name. Professional demeanor is a model. When unable to provide the size tent a customer wanted, referred the customer to off-post vender and arranged a discount.

**Continual Learning**: Completed Customer Service Refresher training and Ski Maintenance Machine repair training. Started CES course. Trained seasonal staff on now to operate pop-up camper and tents and provided over site until they were proficient

**Teamwork/DS**: Volunteered to adjust schedule to allow teammate to go on vacation. Working on team assignment to enhance programming for Wounded Warrior Families.

**Cashier/Check-out:** Researched Rec Trac manual to solve reoccurring equipment inventory error. No errors this month at end of sift. Keeps inventory control in mind at all times, making sure all inventory is secure.

**Equipment Rental/Maintenance**: Set up a card catalog to record rental ski specifications for each regular customer to expedite out-process. Using knowledge learned in Ski Maintenance Machine repair training to reduce down time for skis being unavailable for use.

*3rd Quarter Feedback on Performance/Goal Achievement*:

**Customer Service**: Models C.U.S.T.O.M.E.R principles for teammates. Good listening skills—shows respect to all customers. Excellent greetings and thank you to all.

**Continual Learning**: Completed Applied Financial Planning online course. Continuing to work on CES Foundation. Demonstrated skill in repairing Ski Maintenance Machines and skis.

**Teamwork/DS**: Drafted a great plan for enhancing ski programming for Wounded Warrior Families. IPRs on track. Program advertised and preparing for 1st trip next month.

**Cashier/Check-out:** No errors at end of shift closeout. Maintains accurate resale inventory.

**Equipment Rental/Maintenance**: To promote rental check-out, organizing a “Get Familiar” event with Outdoor Rec check out equipment—an Open House at the Garrison to acquaint customers with scope of equipment available for rent.

*4th Quarter Feedback on Performance/Goal Achievement:*

**Customer Service**: Very good at reminding customers to come back again soon to take advantage of seasonal promotions. Received more positive ICE comments than any other MWR employee—Way to Go!

**Continual Learning**: Completed all training on IDP. Trained other staff to operate and maintain equipment.

**Teamwork/DS**: Wounded Warrior Family Ski Program was successful. 80% of families participated in at least 1 trip with 100% satisfaction. Several families went on multiple trips. Good model for an Army Program. This program results also in increased rental for Outdoor Rec and trip participants for LTS.

**Cashier/Check-out:** 100% error free at end of shift during this performance year. Created a job aid to assist other staff to operate RecTrac. Rental and resale stock always secured.

**Equipment Rental/Maintenance**: Coordinated with local vendors to establish contract to offer equipment that is not available at Outdoor Rec at a reduced cost to customers. This gives more rental options to customers while providing a percentage of profit to Outdoor Rec. A very business minded and innovative thinker.

Initials and Date: 1st Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 06/15/12

2nd Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 08/12/12

3rd Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 11/15/12

4th Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 03/18/13

Operation Excellence C.U.S.T.O.M.E.R. Service Standards

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| --- | --- |
| Quarterly Observation Form | Date of Observation: 31 May 2012  Name Of Observer: Supervisor Finney  Name of Employee:  Date Discussed with Employee: 5 June 2012 Initials: |
| **C**heerful Greetings for every customer | Greeted and welcomed very customer |
| **U**se Positive Communication in person, on the phone, and in email | Yes, you made eye contact and smiled. |
| **S**how a positive image and attitude | Conversations were upbeat and friendly. |
| **T**eamwork—support the FMWR team | Good rapport among staff. |
| **O**wn your job—take responsibility for the role you play in service delivery | You stepped in to assist new staff in learning how to operate a pop-up camper |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service |  |
| **E**xtra mile—go the extra mile to exceed customer expectations | Recognized Outdoor Rec was not able to meet customer requests for cooking and table wear packs, researched cost and specifications and recommended pks for purchase to meet customer demand. |
| **R**emember to thank every guest | Yes, and reminded customers to reserve camp grounds for summer picnics. |

Operation Excellence C.U.S.T.O.M.E.R. Service Standards

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| --- | --- |
| Quarterly Observation Form | Date of Observation: 04 Aug 2012  Name Of Observer: Supervisor Finney  Name of Employee:  Date Discussed with Employee: 8 Aug 2012 Initials: |
| **C**heerful Greetings for every customer | Yes, greeted many by name. |
| **U**se Positive Communication in person, on the phone, and in email | Engaged in conversation with customers/ great interactions. |
| **S**how a positive image and attitude | Outstanding demeanor in representing Outdoor Recreation! |
| **T**eamwork—support the FMWR team | Volunteered to adjust schedule to cover staff on vacation. |
| **O**wn your job—take responsibility for the role you play in service delivery | Setting up card catalog to record info on rental ski specification for each regular customer to expedite check-out process. |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service | When unable to provide tent in size customer needed, referred him to off-post vendor and arranged for a discount. |
| **E**xtra mile—go the extra mile to exceed customer expectations |  |
| **R**emember to thank every guest | Absolutely! |

Operation Excellence C.U.S.T.O.M.E.R. Service Standards

|  |  |
| --- | --- |
| Quarterly Observation Form | Date of Observation: 09 Nov 2012  Name Of Observer: CSPC B. Smiley  Name of Employee:  Date Discussed with Employee: 15 Nov 2012 Initials: |
| **C**heerful Greetings for every customer | Yes, appeared genuinely happy to see each customer. |
| **U**se Positive Communication in person, on the phone, and in email | You do a great job treating customers as individuals and in demonstrating active listening skills |
| **S**how a positive image and attitude |  |
| **T**eamwork—support the FMWR team | You model C.U.S.T.O.M.E.R. standards for all! |
| **O**wn your job—take responsibility for the role you play in service delivery |  |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service |  |
| **E**xtra mile—go the extra mile to exceed customer expectations |  |
| **R**emember to thank every guest | Every customer was thanked for coming in. |

Operation Excellence C.U.S.T.O.M.E.R. Service Standards

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| --- | --- |
| Quarterly Observation Form | Date of Observation: 15 March 2013  Name Of Observer: Supervisor Nelson  Name of Employee:  Date Discussed with Employee: 18 March 2013 Initials: |
| **C**heerful Greetings for every customer | Always |
| **U**se Positive Communication in person, on the phone, and in email | Prompt and courteous in responding |
| **S**how a positive image and attitude | Very |
| **T**eamwork—support the FMWR team | Observed you using down time to teach new staff member how to fit skis to customer and adjust binding. Way to go! |
| **O**wn your job—take responsibility for the role you play in service delivery | Great display of Ski Trips offered thru Leisure Travel. Thanks for your efforts to enhance the marketing of these pkgs to customers. |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service |  |
| **E**xtra mile—go the extra mile to exceed customer expectations |  |
| **R**emember to thank every guest | Yes and by name—And invites customers to come back again. |

Significant Contributions April 04, 2013

Customer Service: I’ve had at least four positive ICE comments this year. I use the Smart Book on a regular basis and keep it updated. I help other program staff to solve customer complaints. I set up a card catalog to record ski specifications so when customers call in advance to request skis, we can have them ready and waiting for customer pick-ups. Not having to wait makes customers happy.

Continual Learning: Completed all training on my IDP (Customer Service refresher, Mandatory training, Applied Financial Planning, Ski Maintenance Machine Repair, CES Foundation. I requested enrollment in online Sports Tournament course to broaden my knowledge base and help with Family and MWR Delivery System Programming. I trained season staff to operate and maintain pop up trailers, campers and tents and provided over site until new had had mastered the skills.

Cashier: No errors at end of shift this year. Trained new staff to use Rec Trac. I always restock and secure stock at the end of the day.

Equipment Rental and Maintenance: I maintained all equipment in good repair and ensured every item was cleaned before returning to shelf. I am often called upon to instruct customers on how to properly operate equipment. After I learned to repair the Ski Maintenance Machine, there was an improvement in down-time for skis being unavailable for rent. I observed that customers often requested packs of pots and pans and table ware which we didn’t have. So I researched the cost and specifications to satisfy this customer demand. I provided this information to my supervisor and she put it in the budget for purchase.

Teamwork/DS: I led a team using the Family and MWR Delivery System process to expand non-facility based programming and increase customer focused programs, specifically for wounded warrior families. Team included reps from SFAC, CYSS, ACS, LTS and outside organizations from the community and local ski resorts. Results included 100% satisfaction on Customer Satisfaction Survey. It leveraged garrison personnel resources across multiple programs rather than having to hire additional MWR staff. I work very well with all staff members and am often asked for help by others which I willingly provide.

