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 Nelson

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 seasonable 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**: Always enthusiastic in greeting customers and in going the extra mile to provide service excellence. Good service recovery—an example is offering larger tent at reduced rate. Takes pride in her work and owns her job. Keeps her cool and does not demonstrates frustration even during high volume/high customer number periods. Developed a survey to get customer feedback on preferences on Outdoor Rec equipment.

**Continual Learning**: IDP includes: Customer Service Refresher course; mandatory training; Applied Financial Planning; Ski Repair. Enrolled in the online Applied Financial Planning course.

**Teamwork/DS**: Works well with team mates. Always willing to help.

**Cashier/Check-out:** Success with Rec Trac continues. No errors this period.

**Equipment Rental/Maintenance**: Continues to learn about repairing different types of equipment.

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

**Customer Service**: Continues to display great customer communication skills. Shows customer service excellence even when dealing with difficult customers. Completed survey to solicit customer preferences for Outdoor Rec equipment. Results of the survey were used to justify purchase of different equipment.

**Continual Learning**: Completed Customer Service Refresher training; nearly finished with Applied Financial Planning online course. To schedule Ski Repair training next month.

**Teamwork/DS**: Successfully worked with CYSS to incorporate Outdoor Rec activities in summer camp. Plans to follow up to extend some of those activities to the School Age Program this next school term.

**Cashier/Check-out:** Entered new equipment into RecTrac data base and printed reports needed for budget planning. No errors this period.

**Equipment Rental/Maintenance**: Still learning how to repair pop-up trailers, campers and propane stoves. Storage area is orderly and equipment is clean.

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

**Customer Service**: Continues to demonstrate excellent customer service. A role model in going the extra mile. An example is helping a customer install a tow bar on his car. Received two positive ICE comments this reporting period.

**Continual Learning**: Has shown improvement in repairing tents. Keep up the good work! Completed Ski Maintenance and Repair training. Expect to demonstrate those skills this quarter. Finished Applied Financial Planning. On track with mandatory training.

**Teamwork/DS**: Works well with staff members and often lends a helping hand—especially answering questions about Rec Trac. Volunteered to participate in the Garrison Holiday Lighting Ceremony.

**Cashier/Check-out:** No errors this quarter. Way to Go!

**Equipment Rental/Maintenance**: Heading into Ski season. Be prepared to maintain the skis in good repair with short time turn-around.

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

**Customer Service**: Has shown great progress in providing service to customers renting ski equipment. Much more confident in this area. Has taken ownership of Ski rental to ensure skis are ready and maintained and available.

**Continual Learning**: Completed all mandatory training as assigned. Recommend next performance year that we add CES Foundation course to IDP.

**Teamwork/DS**: Was a significant contributor as a member of the team to plan and execute the Garrison Holiday Lighting Ceremony. Coordinated with School Age Services to have a children’s’ chorus perform.

**Cashier/Check-out:** No errors this performance year. Outstanding! Diligent about inventory controls—always careful to keep inventory items secure.

**Equipment Rental/Maintenance**: Demonstrated competence in edging and waxing skis. Continues to increase proficiency in equipment repair.

Initials and Date: 1st Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 06/05/12

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

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

|  |  |
| --- | --- |
| Quarterly Observation Form | Date of Observation: 31 May 2012  Name Of Observer: Supervisor Nelson  Name of Employee:  Date Discussed with Employee: 5 June 2012 Initials: |
| **C**heerful Greetings for every customer | Cheerful and enthusiastic |
| **U**se Positive Communication in person, on the phone, and in email | Even during busy holiday week-end with high customer numbers, you used good tone of voice and handled phone calls with a pleasant demeanor. |
| **S**how a positive image and attitude | Yes |
| **T**eamwork—support the FMWR team | Yes |
| **O**wn your job—take responsibility for the role you play in service delivery | It seems you enjoy your job and have an understanding of your responsibilities. |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service | When a customer asked for a 2 person tent, you realized all had been check out. So you offered the next larger size at a reduced rate—which satisfied the customer. |
| **E**xtra mile—go the extra mile to exceed customer expectations |  |
| **R**emember to thank every guest | Yes |

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

|  |  |
| --- | --- |
| Quarterly Observation Form | Date of Observation: 04 Aug 2012  Name Of Observer: Supervisor Nelson  Name of Employee:  Date Discussed with Employee: 8 Aug 2012 Initials: |
| **C**heerful Greetings for every customer | Yes |
| **U**se Positive Communication in person, on the phone, and in email | Good job answering the phone in a timely manner. |
| **S**how a positive image and attitude | You presented good image with clean uniform and positive attitude when while handling a difficult customer. |
| **T**eamwork—support the FMWR team | Good rapport with other Outdoor Rec staff. |
| **O**wn your job—take responsibility for the role you play in service delivery | All equipment cleaned and properly stored. |
| **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 | Took time to repair the last propane stove on-the-spot so you could meet customer’s request. Good work! |
| **R**emember to thank every guest | Yes |

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 H. Hogan  Name of Employee:  Date Discussed with Employee: 15 Nov 2012 Initials: |
| **C**heerful Greetings for every customer | Greeted and welcomed each customer with a smile. |
| **U**se Positive Communication in person, on the phone, and in email | Engaged in conversation with customers but did not over-do it to the extent that you kept other customers waiting. |
| **S**how a positive image and attitude | Looked happy and interested in job. |
| **T**eamwork—support the FMWR team |  |
| **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 | You went the extra mile when you assisted a customer install a tow bar on a car so he could tow the camper that he rented. |
| **R**emember to thank every guest | Yes, and invited them back. |

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

|  |  |
| --- | --- |
| 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 | Enthusiastic welcome to each customer. |
| **U**se Positive Communication in person, on the phone, and in email | Noticed that no one answered phone even through it rang several times. |
| **S**how a positive image and attitude |  |
| **T**eamwork—support the FMWR team | Perhaps you can find time to demonstrate to new staff member how to edge and wax skis. |
| **O**wn your job—take responsibility for the role you play in service delivery | All skis are maintained and ready for check-out—edged and waxed, bindings checked and adjusted. |
| **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 | Customer brought back skies that were not in good condition. You gave her a free check out for the next visit. You are empowered! |
| **R**emember to thank every guest | Yes |

Significant Contributions April 04, 2013

Customer Service: I love serving customers. I’m always ready to help. I developed a customer survey to find out what Outdoor Recreation equipment customers want. My supervisor ordered some new and different equipment as a result. Customers are pleased with the opportunity to rent this equipment.

Continual Learning: I completed everything on my IDP and improved in repairing tents and edging and waxing skis.

Cashier: I’m an expert in operating Rec Trac. I often print reports for my supervisor. I entered new equipment into the Rec Trac data base. This year I had no end of shift errors.

Equipment Rental and Maintenance: I’ve learned a lot about repairing equipment and I’m always willing to show customers how to operate pop-up tents, camper trailers, and propane stoves. I like to keep the storage area near and clean. It makes it easier to find the right piece of equipment for customers.

Teamwork/DS: I worked with CYSS to incorporate Outdoor Recreation activities in summer camp for School Age children. I worked very well with all staff and I’m always willing to help out. I participated in the Garrison Holiday Lighting Ceremony. I got the School Age kids to sing at the ceremony.

