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 McGee

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 or contribute to the planning, developing and execution of 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:*

Came on board 07 March 2012 with two years experience working downtown at a lawn mower repair shop. Enthusiastic to join Outdoor Rec Team; assigned to Outdoor Equipment Check-out facility.

**Customer Service**: Shows appropriate but inconsistent service techniques. Strive for consistency even during high volume service. Customer Service is of upmost importance in this job; expect skills to improve as you become more familiar with procedures and equipment.

**Continual Learning**: Completed FMWR Orientation course, Customer Service training and Rec Trac training IAW approved IDP. Must demonstrate C.U.S.T.O.M.E.R. standards. Next month scheduled for vendor training on equipment maintenance. Next qtr to complete Delivery System online training.

**Teamwork/DS**: Appointed as Outdoor Rec representative to use delivery system process to plan and implement Garrison Fall Festival.

**Cashier/Check-out:** Received training on RecTrac but experiencing too many errors. Work on accuracy.

**Equipment Rental/Maintenance**: Please read manuals provided for equipment and work with team lead for OJT on maintaining equipment. Good job keeping inventory in good order.

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

**Customer Service**: Still room for improvement in serving customers. Must smile and be cordial to every customer. Don’t forget to wear provided OR shirt and use SmartBook to help in answering customer questions.

**Continual Learning**: Did not complete online FMWR DS course even though given adequate time on the job. Attended vendor training on equipment usage. Now able to repair out-of-service skis.

**Teamwork/DS**: Working on team for Fall Festival but have missed a couple of meetings. Because of that, Outdoor Rec is behind the power curse and playing catch-up to meet the requirements for the Festival.

**Cashier/Check-out:** Still experiencing too many RecTrac errors and cash shortages. Will schedule additional one-on-one training with lead.

**Equipment Rental/Maintenance**: Now able to repair most equipment. Good work. Be sure equipment is repaired and cleaned before returning to inventory. I noticed several items were not as clean according to standard. .

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

**Customer Service**: Inconsistent in showing courtesy to customers. You are trained and have demonstrated you know the requirements. I counseled you last month on a negative experience with a customer. In addition you received three negative ICE comments last quarter. Please take this counseling seriously.

**Continual Learning**: Completed online FMWR DS course and one-on-one coaching on Rec Trac.

**Teamwork/DS**: It seems you are not taking your responsibilities as Outdoor Rec representative on the Fall Festival planning team seriously enough. You have missed more meetings; this jeopardizes overall FMWR’s success in this event.

**Cashier/Check-out:** You have averaged five errors/chase shortages per rating period totaling $250.00. Continued errors will jeopardize your employment.

**Equipment Rental/Maintenance**: While you show interest and skill in equipment repair, you lack the same enthusiasm for cleaning and storing equipment. This is one area of customer complaint. They don’t like to pay good money to rent dirty equipment.

Your probationary period will end on 06 March, 2013. If you don’t improve in the areas above: specifically Customer Service, Teamwork/DS, Cashier/Check-out, and Equipment Rental/Maintenance I will have to recommend that you not be retained for this position.

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

**Customer Service**: You have not met these standards to provide excellent customer service to all customers. I counseled you this month on taking a personal phone call while taking payment from a customer.

**Continual Learning**: While you have completed the training on your IDP, you have not demonstrated that you learned the skills on which you were trained.

**Teamwork/DS**: I had to replace you on the Fall Festival team because of your continued failure to attend meetings and act for the Outdoor Rec Team.

**Cashier/Check-out:** Since your lastest coaching on Rec Trac, the number of errors has decreased although the two you had this period are still above standard.

**Equipment Rental/Maintenance**: Customers continue to complain about unrepaired and dirty equipment for which you are responsible. This is unacceptable.

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

2nd Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 08/10/12

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

4th Quarter Rater\_\_\_\_\_\_\_Ratee:\_\_\_\_\_Date: 02/27/13

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 McGee  Name of Employee:  Date Discussed with Employee: 5 June 2012 Initials: |
| **C**heerful Greetings for every customer | Cheerful and appropriate during high volume holiday service |
| **U**se Positive Communication in person, on the phone, and in email | Be mindful of tone of voice and abrupt responses—even when we are very busy, we have to give time and respect to each customer |
| **S**how a positive image and attitude | You seem a little frustrated and overwhelmed by heavy customer volume on Memorial Day weekend. Expect with more experience and more knowledge of equipment, you will be able to handle high traffic without becoming frazzled. |
| **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 | Expect you to demonstrate going the extra mile as you learn more about your job. |
| **R**emember to thank every guest | While you thanked every customer, you didn’t come across as sincere with everyone. Remember how important it is to give everyone a sincere thank you. We want our customers to not only come back, but to recommend our service to a friend. |

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

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| Quarterly Observation Form | Date of Observation: 08 Aug 2012  Name Of Observer: Supervisor McGee  Name of Employee:  Date Discussed with Employee: 10 Aug 2012 Initials: |
| **C**heerful Greetings for every customer | I noticed that you were inconsistent in greeting customers. Some got a hearty greeting, others did not. Please be cheerful to all—it’s so important. |
| **U**se Positive Communication in person, on the phone, and in email | You were prompt in answering the phone but you put the customer on hold for quite a while. How might you have dealt with this need to keep a customer waiting on the phone? |
| **S**how a positive image and attitude | Don’t forget to wear a clean Outdoor Rec shirt! |
| **T**eamwork—support the FMWR team | The store room needs attention. Equipment is not properly cleaned and stored. Be sure to work together with your team to improve this area. |
| **O**wn your job—take responsibility for the role you play in service delivery | Rather than taking responsibility for the messy store room, you indicated it was not your job to clean equipment that you didn’t check in. It’s everyone job’s to keep equipment clean! |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service | We discussed ways you can go the extra mile and you said you would do your best. You can do it! |
| **E**xtra mile—go the extra mile to exceed customer expectations | Expect you to demonstrate going the extra mile as you learn more about your job. |
| **R**emember to thank every guest | I see much improvement in your sincerely thanking customers. Way to go! |

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

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| Quarterly Observation Form | Date of Observation: 09 Nov 2012  Name Of Observer: CSPC Dell Ray  Name of Employee:  Date Discussed with Employee: 15 Nov 2012 Initials: |
| **C**heerful Greetings for every customer | Not every customer gets a cheerful welcome from you even though you have completed Customer Service Training. Would refresher training be helpful? |
| **U**se Positive Communication in person, on the phone, and in email |  |
| **S**how a positive image and attitude | I observed a slow response to customers walking in. You appear to be engaged in a private phone call while customers are waiting for service. |
| **T**eamwork—support the FMWR team |  |
| **O**wn your job—take responsibility for the role you play in service delivery | When customer returned with equipment that he said was not working properly, you suggested that the customer must have broken it. |
| **M**ake it up to the customer—when things go wrong, know your range of authority and offer service | I didn’t hear you make any attempt to make it up to the customer who returned the broken equipment. What options do you have? |
| **E**xtra mile—go the extra mile to exceed customer expectations | I noticed that you had the opportunity to help the customer load equipment into his truck but you didn’t do it—even though there were no other customers waiting for service. Do you think this is a way to go the extra mile? |
| **R**emember to thank every guest | You thanked everyone but sometimes the volume of your voice was very low. Please be sure that customers hear your “thank you”. |

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

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| Quarterly Observation Form | Date of Observation: 25 Feb 2013  Name Of Observer: Supervisor McGee  Name of Employee:  Date Discussed with Employee: 27 Feb 2013 Initials: |
| **C**heerful Greetings for every customer | Observed you taking a personal phone call while keeping a customer waiting at the front desk to pay for equipment rental. This is unacceptable.  If this call was an emergency, you should have alerted your supervisor. |
| **U**se Positive Communication in person, on the phone, and in email | Because of you being distracted on the phone and unavailable to take the payment, the customer decided not to rent the equipment and walked out muttering that he was never coming back. |
| **S**how a positive image and attitude | Taking personal phone calls when you are at the front desk does not demonstrate a positive image or attitude. |
| **T**eamwork—support the FMWR team |  |
| **O**wn your job—take responsibility for the role you play in service delivery | You have been trained in the use of all equipment, but I noticed you had trouble demonstrating how to erect a family tent for a customer. You threw the tools on the ground and yelled for your co-worker to finish the job. Then you walked off and said you were going on a break. |
| **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 | When a customer asked about the hours of another Family and MWR activity, you shrugged your shoulders and said you didn’t know. This would have been the time to refer to the Smart Book so you could provide the customer with the information she wanted—and go the extra mile. |
| **R**emember to thank every guest |  |

Significant Contributions Feb 28 2013

Continual Learning: I learned a lot about the job. I completed Customer Service Training and a course on line and everything that you told me to do.

Customer Service: I would wear the uniform shirt but I don’t see why it’s needed because everyone knows this is Outdoor Rec. I did my best to be nice to customers but some of them were not easy to be nice to.

Cashier: I tried to learn REcTrac to take payments but is a very difficult and confusing system. It will take a long time to get it right.

Equipment Rental and Maintenance: I really like to repair equipment and I’m very good at it. I just don’t have time to keep everything clean and neat.

Teamwork/DS: I didn’t attend all Fall Festival Meetings because we were too busy at Outdoor REc. When I did go, the other workers seemed to leave me out. Maybe because I’m new.

