

ADMINISTRATIVE SUPPORT SPECIALIST (ADVANCED)
College of Arts, Humanities, & Sciences – Center for Social Justice

The Center for Social Justice is a mid-sized social sciences based center housed in the College of Arts, Humanities, and Sciences. The Center is interdisciplinary in nature and brings together scholars and resources across the areas of Sociology, Economics, and Political Science. The Center is committed to educating students at both the undergraduate and graduate level with a passion in the areas of social, political, and economic justice and supporting faculty with a commitment to research in these areas.

This position reports to the Business Manager for the Center of Social Justice. This position’s primary purpose is to serve as the first point-of contact for all incoming communications to the center. This position serves as the receptionist for the center and triages all calls, visitors, and mail on behalf of the unit. This position also serves as the primary administrative contact on facilities issues and provides day-to-day transactional support on basic financial activities for the center.

POSITION DESCRIPTION – JOB DUTIES (percentages indicate time and effort of employee performing these duties)		
1	40%	<p>RECEPTION</p> <ul style="list-style-type: none"> • Receives and triages all incoming calls for the Center, redirecting calls and messages as necessary • Greets visitors and informs necessary parties of their arrival • Assigns visitor parking permits and maintains parking log for the department • Maintains reception area, ensuring area remains neat and professional • Monitors inventory of office supplies; coordinates and places office supply orders Center-wide • Assists with incoming and outgoing US mail; receives all incoming/outgoing packages on behalf of faculty and staff in the Center • Schedules meetings for departmental staff to include sharing directions, parking information, and agendas as directed by meeting coordinators
2	30%	<p>FACILITIES ASSISTANCE</p> <ul style="list-style-type: none"> • Assists Facilities Manager with building maintenance, recycling, room set-up, and other building-related needs • Oversees Center meeting rooms, reserving meeting space for department staff and ensuring meeting rooms are prepared for upcoming events • Posts conference/meeting room schedule daily • Triage work order requests and handles all administrative facilities requests; notifies Facilities Manager when needs arise that are not administrative in nature
3	25%	<p>FINANCIAL ASSISTANCE</p> <ul style="list-style-type: none"> • Assists Business Manager with transactional financial requests • Assists Business Manager with Accounts Payable and Accounts Receivable • Assists Business Manager with departmental procurement activities • Performs data entry using MS Excel • Deposits departmental checks when asked by Business Manager
4	5%	<p>OTHER DUTIES</p> <ul style="list-style-type: none"> • During peak recruitment season, assists Student Services Manager with mailing letters of acceptance, scheduling advising sessions, updating student records, and performing other administrative tasks related to student services as needed • Schedules and confirms candidate interviews for Master’s Program admission • Plans events (catering, room reservation, hotel logistics) for students during admissions weekend every fall and spring • Perform other duties as assigned within the Center

PERFORMANCE PLAN - INDIVIDUAL GOALS (percentages indicate weight toward performance rating)		
1	CUSTOMER SERVICE	Weight: 20%
<p>Represent the Center professionally at all times to serve as the “face” of the Center in order for our colleagues, clients, and students feel welcomed and attended to so that the Center is viewed positively by our stakeholders.</p> <ul style="list-style-type: none"> • Return all phone calls/respond to all messages within 4 business hours • Check mail daily at 10a and 2p; distribute to appropriate staff members within one hour of receipt • Ensure rooms and parking are reserved and that visitors have information needed (in terms of direction, parking, etc.) to make visit to the center positive • Achieve positive feedback of 95% or greater on room reservation/set up process from customer service tickets related to room reservation process • Maintain professional front office area, cleaning area and removing trash when needed <p>Exceeding expectations may include significant unsolicited feedback from customers on positive customer service.</p>		
2	STANDARD OPERATING PROCEDURE DOCUMENTATION	Weight: 15%
<p>Create SOPs for duties related to admissions and event planning in order to provide consistency, efficiency, and quality in our administration of these events so that we help to put a “best foot forward” in engaging and attracting top students to the Center.</p> <ul style="list-style-type: none"> • Meet with stakeholders involved in admissions process for MA program, determine roles in the process, and identify stress points in the efficient operation of the events (due June 30) • Establish a short follow-up survey for students to gain feedback on the events for future planning (due July 31); Student ratings of the events should average no less than a 4.0 on a 5-point scale over the course of the year (showing satisfaction with the process and feeling engaged and positively toward the department); The average rating should either maintain or improve over the course of the first year • Develop concise and clear template emails/itineraries for students interviewing for admission, including checklists for critical points in student recruitment process and a list of vendors / key contact information used for recruitment events (due Aug 31) • Develop flowchart that provides an overview of the admissions process and who in the Center participates at various points in the process (due Aug 31) • Implement new procedures by September 1 so that survey data can be collected with each event through the fall and spring semesters <p>Exceeding expectations may include determining additional processes needing documentation, taking initiative to develop helpful resources and tools, or making useful recommendations to streamline student recruitment process.</p>		
3	CREATE FACILITIES TRACKING SYSTEM	Weight: 10%
<p>As part of your responsibilities to assist with the administration of facilities requests, design a ticketing and tracking system for all facilities requests in order to triage and resolve facilities requests more efficiently and effectively so that our presenters, participants, and colleagues can productively work in a pleasant and conducive environment.</p> <ul style="list-style-type: none"> • Work with IT group to create facilities email request system to track work orders • Log requests in database within one hour of receipt • Triage requests and respond at least 85% of the time within 2 hours of receipt • Tracking system should be operational by March 31 <p>Exceeding expectations may include starting phase two of tracking system before end of cycle, which includes working with IT to establish tracking metrics to share with Business Manager in order to better assess facility needs.</p>		
4	PEOPLESOFT TRAINING AND PROFICIENCY	Weight: 5%
<p>Achieve proficiency in new PeopleSoft Finance System by end of performance cycle in order to process actions accurately so that our transactions are compliant with University policy.</p> <ul style="list-style-type: none"> • Attend required trainings necessary to obtain system access • Attain 80% accuracy/approval of actions from central finance within 24 hours of submission without actions being returned due to user error or being incomplete • Create FAQs related to system access/processing of transactions <p>Exceeding expectations may include obtaining mastery of system and providing assistance to other users in the department on finance/admin functions as needed.</p>		

Note: The following pages (*Talent Development Plans, Off-Cycle Reviews, and Annual Appraisals*) show examples for three different employees performing at three different levels of expectation. Some information may be similar across the examples.

In the examples below, all three employees are new/probationary employees, so you will see that their initial development plans are the same. The development goals may differentiate later on as the employee’s skills and work product are assessed.

TALENT DEVELOPMENT PLAN	Example: KORRIE – NOT MEETING Expectations
<ul style="list-style-type: none"> • Korrie will have mandatory training on the new PeopleSoft system for financial transactions. • Attend “Effective Communications” Class (scheduled: June 20). • Other training may be assigned throughout the probationary period as needs are identified. 	

TALENT DEVELOPMENT PLAN	Example: KEN – MEETING Expectations
<ul style="list-style-type: none"> • Ken will have mandatory training on the new PeopleSoft system for financial transactions. • Attend “Effective Communications” Class (scheduled: June 20). • Other training may be assigned throughout the probationary period as needs are identified. 	

TALENT DEVELOPMENT PLAN	Example: KELLY – EXCEEDING Expectations
<ul style="list-style-type: none"> • Kelly will have mandatory training on the new PeopleSoft system for financial transactions. • Attend “Effective Communications” Class (scheduled: June 20). • Other training may be assigned throughout the probationary period as needs are identified. 	

OFF-CYCLE REVIEW				<i>Example: KORRIE – NOT MEETING Expectations</i>	
Date of Review	Interim	Probationary	Other	Supervisor Initials	Employee Initials
12/08/2016		X			
Comments:	Korrie has been with us 6 months now and is making progress on adapting to the position. She has worked intently on the SOP project (Goal #2) for the first part of this performance year, but must be careful not to let that project overwhelm the rest of her responsibilities. She has begun work on the tracking project (Goal #3) so needs to be sure for the rest of this cycle that her work on that project does not occur at the expense of her other responsibilities. She has kept up with her training requirements as set in her performance plan. We have discussed feedback from her customers about interactions that have been described as “abrupt” and that she needs to maintain herself as the “face” of the Center for both internal and external clients.				

OFF-CYCLE REVIEW				<i>Example: KEN – MEETING Expectations</i>	
Date of Review	Interim	Probationary	Other	Supervisor Initials	Employee Initials
12/08/2016		X			
Comments:	Ken has been with us 6 months now and is meeting all expectations outlined in the initial performance plan. He comes from a project management background and has hit the ground running on his individual goals, and completed the SOP project (Goal #2) on time and to specifications and has already begun work on the tracking project (Goal #3). He is getting up to speed on the financial system and processing transactions appropriately (Goal #4). He is still learning the people, players, and culture of our Center, and I encourage Ken to take more initiative over the next few months in getting to know his colleagues and customers better (Goal #1, Goal Customer-Oriented).				

OFF-CYCLE REVIEW				<i>Example: KELLY – EXCEEDING Expectations</i>	
Date of Review	Interim	Probationary	Other	Supervisor Initials	Employee Initials
12/08/2016		X			
Comments:	Kelly has been with us 6 months now and continues to do an excellent job. We launched the new admissions program this fall using Kelly’s SOPs (Goal #2) and the event was a significant success thanks in large part of Kelly’s thoughtful and detailed work. She is making significant progress on her next project (Tracking; Goal #3) and appears to be on target to complete by deadline. I have received many positive comments from clients and colleagues about working with Kelly. We are happy to have her on our team as she continues to make positive contributions to the office.				

ANNUAL APPRAISAL	Example: KEN – MEETING Expectations
<ul style="list-style-type: none"> Rate each Individual and Institutional Goal. <ul style="list-style-type: none"> 1 = Not Meeting Expectations 2 = Meeting Expectations 3 = Exceeding Expectations Multiply the Weight by the Rating to get the Score for each goal. Use two decimal places. (Example: 10% x 2 = 0.20) 	<ul style="list-style-type: none"> Add all of the Scores together to assign a Final Overall Rating. <ul style="list-style-type: none"> 1.00 to 1.69 = Not Meeting Expectations 1.70 to 2.69 = Meeting Expectations 2.70 to 3.00 = Exceeding Expectations Provide comments and signatures on the next page.

#	INSTITUTIONAL GOALS	Weight	x	Rating	=	Score
1	Expertise	10%	X	2	=	0.20
2	Accountability	15%	X	3	=	0.45
3	Customer-Oriented	15%	X	2	=	0.30
4	Team-Oriented	5%	X	2	=	0.10
5	Compliance & Integrity	5%	X	2	=	0.10
6	Supervision (if applicable)	-	X	-	=	-
Subtotal						1.15

#	INDIVIDUAL GOALS	Weight	x	Rating	=	Score
1	Customer Service	20%	X	2	=	0.40
2	Standard Operating Procedure Documentation	15%	X	3	=	0.45
3	Create Facilities Tracking System	10%	X	3	=	0.30
4	PeopleSoft Training and Proficiency	5%	X	2	=	0.10
5	-	-	X	-	=	-
Subtotal						1.25

FINAL OVERALL RATING	TOTAL SCORE	=	2.40
Has the employee received a disciplinary action during this performance cycle <u>and/or</u> received any rating of 1 (Not Meeting Expectations) on this appraisal? If <u>YES</u> , then the final overall rating <u>cannot</u> equal Exceeding Expectations, regardless of the total score.		YES	
		NO	X

NOT MEETING EXPECTATIONS	MEETING EXPECTATIONS	X	EXCEEDING EXPECTATIONS
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ANNUAL APPRAISAL

Example: KEN – MEETING Expectations

SUPERVISOR COMMENTS ON EMPLOYEE'S PERFORMANCE

Ken's greatest successes this year have been in overseeing and managing the two primary projects outlined in his performance plan: Individual Goal 2 - working on standard operating procedures for the office; and Individual Goal 3 - creating a facilities tracking system.

Ken has demonstrated an outstanding ability to manage projects, coordinate with stakeholders, and achieve deliverables on/ahead of schedule. He has already moved on to phase 2 of the tracking system ahead of schedule, has completed the SOPs outlined, and has made recommendations for (and begun creating) additional SOPs that will be beneficial for our office. The guidance documents he created for the admissions events were incredibly well-designed, and I received many comments from students and parents on how helpful, concise, and clear they were. I have shared them with several colleagues in the College who are planning to adapt them for their use. This is an impressive contribution for someone so new to the team, and speaks to Ken's strengths. Others in the organization have taken note of his project management skills and have begun asking his for advice on their own projects, and Ken has been very willing to assist his colleagues. This is the type of teamwork and collaboration we strive for in our Center.

Ken is consistently presents a pleasant attitude and is professional and helpful to all clients and co-workers. He represents the Center in a positive light. His background in project management has assisted him in excelling at his project work. Ken continues to develop proficiency in the general office tasks and, like the rest of campus, he is working to understand our new financial system and has attended all required trainings. The system is at times counterintuitive, which I think has been challenging for Ken to adapt to, but I also see him actively working out the kinks in his communications with me and the help desk.

Ken has developed strong working relationships with our IT contacts through his project work. He struggles sometimes understanding the nuances of the university environment and the challenges associated with interacting with and adapting to faculty, staff, student, and parent populations. We have discussed some stressful conversations with upset customers, and Ken has struggled to know how to address these situations in the moment from the customer-relations side (he is proficient with most of the technical aspects in these interactions).

I encourage Ken to take time in the coming year to find opportunities to connect with others on a more personal level to better anticipate customer needs and behaviors in the moment. He is meeting all other expectations in these areas, and I am confident once he develops a better grasp of the culture of our center and its players and gets a few more communication strategies under his belt, he will function more confidently and successfully in these duties. I am pleased that, as a new employee, he has stepped up to serve on the Center's social committee, as this may help him learn more about the people and personalities at the Center.

I also encourage Ken to continue to speak up with his ideas – his unique background helps him see things from a new and different perspective for our team. This new energy and these creative ideas can only benefit the work of our Center.

ANNUAL APPRAISAL	Example: KORRIE – NOT MEETING Expectations
<ul style="list-style-type: none"> Rate each Individual and Institutional Goal. <ul style="list-style-type: none"> 1 = Not Meeting Expectations 2 = Meeting Expectations 3 = Exceeding Expectations Multiply the Weight by the Rating to get the Score for each goal. Use two decimal places. (Example: 10% x 2 = 0.20) 	<ul style="list-style-type: none"> Add all of the Scores together to assign a Final Overall Rating. <ul style="list-style-type: none"> 1.00 to 1.69 = Not Meeting Expectations 1.70 to 2.69 = Meeting Expectations 2.70 to 3.00 = Exceeding Expectations Provide comments and signatures on the next page.

#	INSTITUTIONAL GOALS	Weight	x	Rating	=	Score
1	Expertise	10%	X	2	=	0.20
2	Accountability	15%	X	1	=	0.15
3	Customer-Oriented	15%	X	1	=	0.15
4	Team-Oriented	5%	X	2	=	0.10
5	Compliance & Integrity	5%	X	2	=	0.10
6	Supervision (if applicable)	-	X	-	=	-
Subtotal						0.70

#	INDIVIDUAL GOALS	Weight	x	Rating	=	Score
1	Customer Service	20%	X	1	=	0.20
2	Standard Operating Procedure Documentation	15%	X	2	=	0.30
3	Create Facilities Tracking System	10%	X	1	=	0.10
4	PeopleSoft Training and Proficiency	5%	X	2	=	0.10
5	-	-	X	-	=	-
Subtotal						0.70

FINAL OVERALL RATING	TOTAL SCORE	=	1.40
Has the employee received a disciplinary action during this performance cycle <u>and/or</u> received any rating of 1 (Not Meeting Expectations) on this appraisal? If YES , then the final overall rating <u>cannot</u> equal Exceeding Expectations, regardless of the total score.		YES	X
		NO	

NOT MEETING EXPECTATIONS	X	MEETING EXPECTATIONS		EXCEEDING EXPECTATIONS	
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ANNUAL APPRAISAL

Example: KORRIE – NOT MEETING Expectations

SUPERVISOR COMMENTS ON EMPLOYEE'S PERFORMANCE

It has been a challenging first year for Korrie since she began June 5, and she has struggled to complete many of her assigned duties in the manner outlined in her performance plan.

Korrie has struggled significantly in terms of her time management skills. She has failed to meet established deadlines such as completing the Facilities Tracking System by March 31 (Goal 3) meeting established deadlines to check mail daily on a set schedule, which has impacted the overall efficiency of the office. We have talked about the need for Korrie to be more mindful of the time and her schedule and have begun mapping out a schedule for her work day to accommodate her getting everything required done for the office.

While she has made good progress on developing the SOP documentation (Goal 2) and met most of the deadlines for that goal, it has been at the expense of other work getting completed in the office. That project was a significant portion of her first few months on the job, and her focus on that work may have contributed to not establishing a regular workflow for her other duties.

We have had numerous discussions regarding her interactions with colleagues and clients (Institutional Goals 3 and 4). Co-workers and clients have stated that Korrie often seems sullen and/or disengaged. Feedback from customer service tickets response averaged 76% for the year (below the expected 85% on the performance plan), and aggregate data indicates that Korrie has been inefficient in her response time and is perceived as unprofessional when following up with customers (there were frequent comments from a variety of customers that described the interactions as "abrupt" and that she looks "unhappy" at the front desk). This is true from my own observation, and Korrie and I have discussed this on several occasions throughout the year. Within our 2-person "team," Korrie has been more responsive and more positive with me, but that needs to carry forward to our internal and external clients as well.

As the face of the office, Korrie is expected to always greet visitors and callers with a friendly demeanor. This is not happening with regularity and must be improved. Korrie has shared that when she is 'stressed out' or trying to concentrate, she has a hard time keeping her customer and team orientation going at the same time, so finds it difficult to "shift gears" in the moment. We have discussed training possibilities to help address this.

I need to see improvement in Korrie's professionalism and prioritization. Too much time is being spent on one project at a time, which causes other projects to fall behind. We are a dynamic, growing Center, and Korrie needs to sustain the necessary multi-tasking skills to meet expectations for this position. I would like for her to attend "Developing Organizational Skills" training this year. And I also want her to continue to work with me on outlining a daily/weekly schedule to follow to ensure all tasks are getting done in the time prescribed.

Korrie's probationary period ends June 4.

ANNUAL APPRAISAL	<i>Example: KELLY – EXCEEDING Expectations</i>
<ul style="list-style-type: none"> • Rate each Individual and Institutional Goal. <ul style="list-style-type: none"> ▪ 1 = Not Meeting Expectations ▪ 2 = Meeting Expectations ▪ 3 = Exceeding Expectations • Multiply the Weight by the Rating to get the Score for each goal. Use two decimal places. (Example: 10% x 2 = 0.20) 	<ul style="list-style-type: none"> • Add all of the Scores together to assign a Final Overall Rating. <ul style="list-style-type: none"> ▪ 1.00 to 1.69 = Not Meeting Expectations ▪ 1.70 to 2.69 = Meeting Expectations ▪ 2.70 to 3.00 = Exceeding Expectations • Provide comments and signatures on the next page.

#	INSTITUTIONAL GOALS	Weight	x	Rating	=	Score
1	Expertise	10%	X	3	=	0.30
2	Accountability	15%	X	3	=	0.45
3	Customer-Oriented	15%	X	3	=	0.45
4	Team-Oriented	5%	X	3	=	0.15
5	Compliance & Integrity	5%	X	2	=	0.10
6	Supervision <i>(if applicable)</i>	-	X	-	=	-
Subtotal						1.45

#	INDIVIDUAL GOALS	Weight	x	Rating	=	Score
1	Customer Service	20%	X	3	=	0.60
2	Standard Operating Procedure Documentation	15%	X	3	=	0.45
3	Create Facilities Tracking System	10%	X	3	=	0.30
4	PeopleSoft Training and Proficiency	5%	X	2	=	0.10
5	-	-	X	-	=	-
Subtotal						1.45

FINAL OVERALL RATING		TOTAL SCORE	=	2.90	
Has the employee received a disciplinary action during this performance cycle <u>and/or</u> received any rating of 1 (Not Meeting Expectations) on this appraisal? If YES , then the final overall rating cannot equal Exceeding Expectations, regardless of the total score.			YES		
			NO	X	
NOT MEETING EXPECTATIONS		MEETING EXPECTATIONS		EXCEEDING EXPECTATIONS	X

(see comments on next page)

ANNUAL APPRAISAL

Example: KELLY – EXCEEDING Expectations

SUPERVISOR COMMENTS ON EMPLOYEE'S PERFORMANCE

Kelly has had an excellent first year since starting with the Center June 5. She has presented herself as a model employee and has exceeded most of the expectations outlined in her performance plan. I have received unsolicited positive feedback almost weekly about her positive attitude, professionalism, and helpfulness. I have observed her treat the full range of her clients with the same care and attention, whether they are a prospective student or a ranking faculty member. Her customer service feedback data related to room reservations/set up was 100% positive for the year. Clients noted her willingness to troubleshoot and negotiate when there were room conflicts that needed to be resolved (Ind. Goal 1).

Kelly took the lead on two big projects for our office this year: the standard operating procedure guidelines (Ind. Goal 2) and the creation of the facilities tracking system (Ind. Goal 3). She completed the SOP project on time and was able to identify and eliminate several redundant and conflicting activities from the old process, which resulted in a significant reduction in the complexity of our processes (to the immense satisfaction of our admissions group). I was impressed that she was able to make these changes without alienating any colleagues or casting blame. It is sometimes challenging for a new employee to get long-standing employees to change how they are doing things, but Kelly's collegial and respectful "we're in this together" approach generated buy-in and goodwill rather than resistance.

Kelly lights up when working with the students and their parents, and I received many comments from parents about her helpfulness and clarity; one called her "an absolute gem." Even though her role is primarily administrative and supportive for our admissions events, she has become an integral part of the program's success.

Kelly's work on the Facilities Tracking System is already a huge success, and its implementation has streamlined many processes in our work with that group. She far exceeded expectations in implementing phase one (two months ahead of schedule), is almost through with phase two (which originally was planned for completion by October), and is already working with our student services group to recommend how a similar process may work for tracking their applications. I appreciate her ability to pull information together and find innovative solutions to long-standing issues.

As the rollout of the PeopleSoft system has been a challenge for all of our campus, Kelly has shared in that struggle. Despite frustrations with the system, she has maintained a positive attitude and is continuing to learn what is expected of her in using the system (Goal 4).

We are so fortunate to have her on our team representing the Center!