Samples of employee work expectations

When writing a work expectation, think of S M A R T as a guide.

<p>| | |</p>
<table>
<thead>
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<tbody>
<tr>
<td>S</td>
<td>Specific</td>
</tr>
<tr>
<td>M</td>
<td>Measurable</td>
</tr>
<tr>
<td>A</td>
<td>Attainable</td>
</tr>
<tr>
<td>R</td>
<td>Relevant</td>
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<tr>
<td>T</td>
<td>Timely</td>
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A work expectation needs to be specific and describe exactly what is expected. How specific a work expectation needs to be depends on the level of the employee. A department head might have a work expectation: *satisfaction with a City service improved by 5% as measured by the resident survey*. That’s specific enough to be really clear about the result wanted. A customer service representative, on the other hand, by virtue of his level of responsibility, likely requires more definition in his work expectations – for example: *customer service scripts and online decision support system used during service calls to reduce average call escalation rates to less than 3% in any given week*.

Generally:

- **Upper Level Manager/Executive** work expectations focus on overall department performance
- **Managers/Supervisors** focus on unit and functional results and performance of the work team: managing the operation, managing the team, managing the budget and managing external relationships
- **Professional/Technical** work expectations are often project related
- **Individual Contributor** work expectations focus on results of assigned tasks, contribution to the work team
- **Major Project/Initiative** work expectations include major projects or department initiatives that will briefly be within your job responsibilities but not be permanent

Use these SAMPLES, as ideas for developing your own work expectations.

### Upper Level Managers/Executives

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Lead the department/division/unit</th>
</tr>
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</table>
| Outcomes (results) | Vision translated and communicated to staff  
Environment of trust and cooperation established  
Financial information reported  
Unanticipated or difficult situations resolved  
Responsibility for the unit accepted |
| Performance Standards | So that…  
Staff is mobilized to accomplish unit goals  
Suitable oversight is provided  
Financial decisions are informed and well documented  
Staff can take realistic and appropriate actions |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Administer the department/division/unit</th>
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</table>
| Outcomes (results) | Optimal staffing levels are identified and maintained  
Plans created; authority delegated and workflow monitored  
Information conveyed  
Obstacles that hinder progress removed  
Performance management tasks completed |
| Performance Standards | So that…  
Unit’s business is conducted effectively  
Priorities and deadlines are met  
Operation is within budget  
Employees know where they stand  
Employees observe with policies, procedures and work norms and values |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Manage budget</th>
</tr>
</thead>
</table>
### Outcomes (results)
- Budget developed
- Budget communicated
- Budget monitored

### Performance Standards
- So that...
  - Budget documents are filed by deadline and in acceptable format
  - No more than x requests for budget justification
  - All employees have access to budget
  - Performance against budget monitored monthly and adjustments communicated

### Major Job Duty
- Manage operations

### Outcomes (results)
- Objectives listed in the business plan are accomplished
- Progress monitored

### Performance Standards
- So that...
  - Objectives are accomplished within the measures described in the business plan
  - Department managers have quarterly input into plans for executing objectives
  - Progress against objectives monitored quarterly and adjustments made

### Major Job Duty
- Assist Director with the day-to-day Operations of the Department

### Outcomes (results)
- Budgets proposed
- Reports submitted
- Staffing levels are optimal
- Performance management tasks completed

### Performance Standards
- So that...
  - Division budget balanced
  - Core program budget plus any additional innovative programs proposed at a professional level so that the Mayor and City Council can consider it for funding
  - Monthly progress, bi-annual division and Results Minneapolis reports submitted so that timely consideration for action can be made by city leadership
  - All staffing needs are promptly addressed so that the work group's business is conducted effectively and with minimum disruption (i.e., turnovers)
  - Plans and evaluations are created so that employees are noticed of their performance and any obstacles that hinder progress removed
  - Make responsible spending decisions so that the division's budget is optimal with minimal waste

### Mid-level Managers/Supervisors

### Major Job Duty
- Manage the team

### Outcomes (results)
- Team is engaged, effective, competent and reliable
- Performance is managed
- Work is balanced
- Team works well together

### Performance Standards
- So that...
  - Customers are satisfied 95% of time
  - Employees adhere to work rules
  - Any 2 team members can work together
  - Work is done within budget

### Major Job Duty
- Manage Staff

### Outcomes (results)
- Work expectations set
- Individual and group performance monitored
- Feedback delivered
- Employees involved in work
- Information about unit is shared monthly

### Performance Standards
- So that...
  - All employees know what is expected of them
  - All employees know how well they are performing
  - Employees contribute x suggestions per month to improve work processes
  - No more than x instances of employees reporting not having needed information
<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Manage staff</th>
</tr>
</thead>
</table>
| **Outcomes (results)** | Performance managed  
Staff informed  
Staff deployed to projects  
Staff engaged  
Positive things happen |
| **Performance Standards** | So that...  
All employees know work Performance Standards and measures  
All employees follow work norms  
Employees have opportunities to meet and discuss  
All employees know their decision-making authority  
Employees have an active role in work decisions  
All employees exhibit competence  
Boss and employees are happy (stress level is manageable) |

**Professional/Technical**

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Manage Department-Specific Software Program</th>
</tr>
</thead>
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| **Outcomes (results)** | software tools implemented  
software tools function  
Software problems resolved  
Training delivered |
| **Performance Standards** | So that...  
Software problems not requiring BIS are resolved within 4 hours  
Software problems requiring BIS are resolved within 2 days  
Workarounds are made when needed |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Coordinate projects with other City Departments and other gov’t agencies</th>
</tr>
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</table>
| **Outcomes (results)** | project delivered  
changes to project plan documented |
| **Performance Standards** | So that...  
expenses are within 5% of budget  
work that City controls is on schedule  
trends are noted |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Manage projects</th>
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| **Outcomes (results)** | Project delivered  
Users satisfied |
| **Performance Standards** | So that...  
On time  
On budget  
To specifications listed in the project proposal |

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<thead>
<tr>
<th>Major Job Duty</th>
<th>Provide advice/consultation/guidance</th>
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| **Outcomes (results)** | Information and advice provided  
Options for solutions identified  
Risk associated with each option is assessed  
Relationships/partnerships built and maintained |
| **Performance Standards** | So that...  
Organizational/Department initiatives and strategic goals supported  
Solutions presented are appropriate  
• legally defensible, according to accepted practice  
• within x timeframe  
• customer follows the advice |
<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Human Resources Consulting to customer departments</th>
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</table>
| Outcomes (results) | Strategic consulting  
Employee/Labor relations provided  
Regulatory compliance consulting  
Organizational Design development |
| Performance Standards | So that...  
No escalation up to management (timely, accurate, legally defensible & effective)  
Customer feedback that is acceptable to manager |

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<th>Individual Contributor</th>
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<tbody>
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<td>Major Job Duty</td>
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</table>
| Outcomes (results) | Physical files in order  
Electronic files in order |
| Performance Standards | So that...  
Files 100% in place  
No reports of missing files  
Naming convention followed  
Data retention schedules followed |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Customer Service</th>
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| Outcomes (results) | Customer questions answered  
Requests for material handled  
Paperwork processed |
| Performance Standards | So that...  
Requests handled within 24 hours  
Phone answered within 3 rings  
Calls returned within 24 hours  
Information given is 100% accurate  
No more than x customer complaints per week |

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Complaint resolution</th>
</tr>
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| Outcomes (results) | Complaint resolved  
Records of action taken maintained |
| Performance Standards | So that...  
90% of customers accept decision  
Action starts within 24 hours  
No more than 10% of complaints escalate |

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<thead>
<tr>
<th>Major Job Duty</th>
<th>Administrative support</th>
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| Outcomes (results) | Paperwork processed  
Data verified and entered online  
Meetings planned and calendar maintained  
Reports reviewed  
Routine correspondence written and sent out |
| Performance Standards | So that...  
Deadlines for paperwork are met  
Calendar is 100% accurate  
Items of note in reports are highlighted for manager  
Correspondence is 100% correct |
## Major Projects/Initiatives

<table>
<thead>
<tr>
<th>Major Job Duty</th>
<th>Implement Performance Management with Staff</th>
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| **Outcomes (results)** | Act as “champion” during implementation (work expectation setting through appraisal)  
Staff informed of PerformMinneapolis  
Staff expectations regarding PerformMinneapolis is identified and communicated  
Coaching or training provided  
Progress updates provided |
| **Performance Standards** | So that...  
Supervisors and staff meet at least monthly to discuss performance  
Staff understand and is engaged in the 3 main processes of PerformMinneapolis (Plan, Monitor, and Recognize our work)  
Staff uses the language of PerformMinneapolis  
Staff consistently demonstrate behaviors associated with initiative (6 Job Success Factors) |