

GOAL SETTING AND (OS1)

Incorporating (OS1) Logistics And Tracking
Into Employee Performance Appraisals



WAKE FOREST
UNIVERSITY

SAN ANTONIO, TX | JULY 14, 2014

What is the value of Performance Management?

In (OS1) we have been talking about this for YEARS!

- Common Goals
- Measurement
- Identify Best Practices
- Satisfaction
 - Motivation
 - Value
- Return on Investment
- Reduced Costs

(OS1) Logistics and Goals



Goal-Setting Framework

- Developmental goals result in outcomes that directly contribute to departmental success.
- Well-written goals meet specific criteria:
 - **Specific**
 - **Measurable**
 - **Action-oriented**
 - **Realistic**
 - **Time-bound**



Performance Goal:

Demonstrate proficiency as an (OS1) Specialist

Performance Activities:

Use the (OS1) training materials and attend training sessions

Success Measures:

Score at least 70% on a Team Checklist by the mid-year review, and 80% by the next annual review.



The image shows a 'Team Checklist' form for custodians. At the top, it features the Wake Forest University logo and the title 'Team Checklist'. The form is organized into several sections, each with a title and a list of tasks to be checked off. Each task is preceded by a checkbox and a 'of #' indicator. The sections are: KITTING (6 items), ACCESSORIES (4 items), CONTROL ITEMS (4 items), LIGHT DUTY (6 items), VACUUM (6 items), RESTROOM (6 items), UTILITY (6 items), BEYOND COMPLIANCE (6 items), and PANTRY (4 items). Below these sections is a 'GOALS' section with a grid for tracking progress. At the bottom, there are fields for 'Facility', 'Location', 'Date', and 'Signature', followed by a 'Comments' section. The form is branded with the 'Maintenance' logo and the text '©2008 • WakeForest • All Rights Reserved • www.maintenance.com • Doc. 8-12'.

Facility	Location	Date	Signature

Comments

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Performance Goal:

Report matters of maintenance, safety and security using the (OS1) Service Request Form.

Performance Activities:

Submit at least one per week by the mid-year review, and two per week by the next annual review.

**Success Measures:**

Show a history of submitted forms over the review period

Performance Goal:

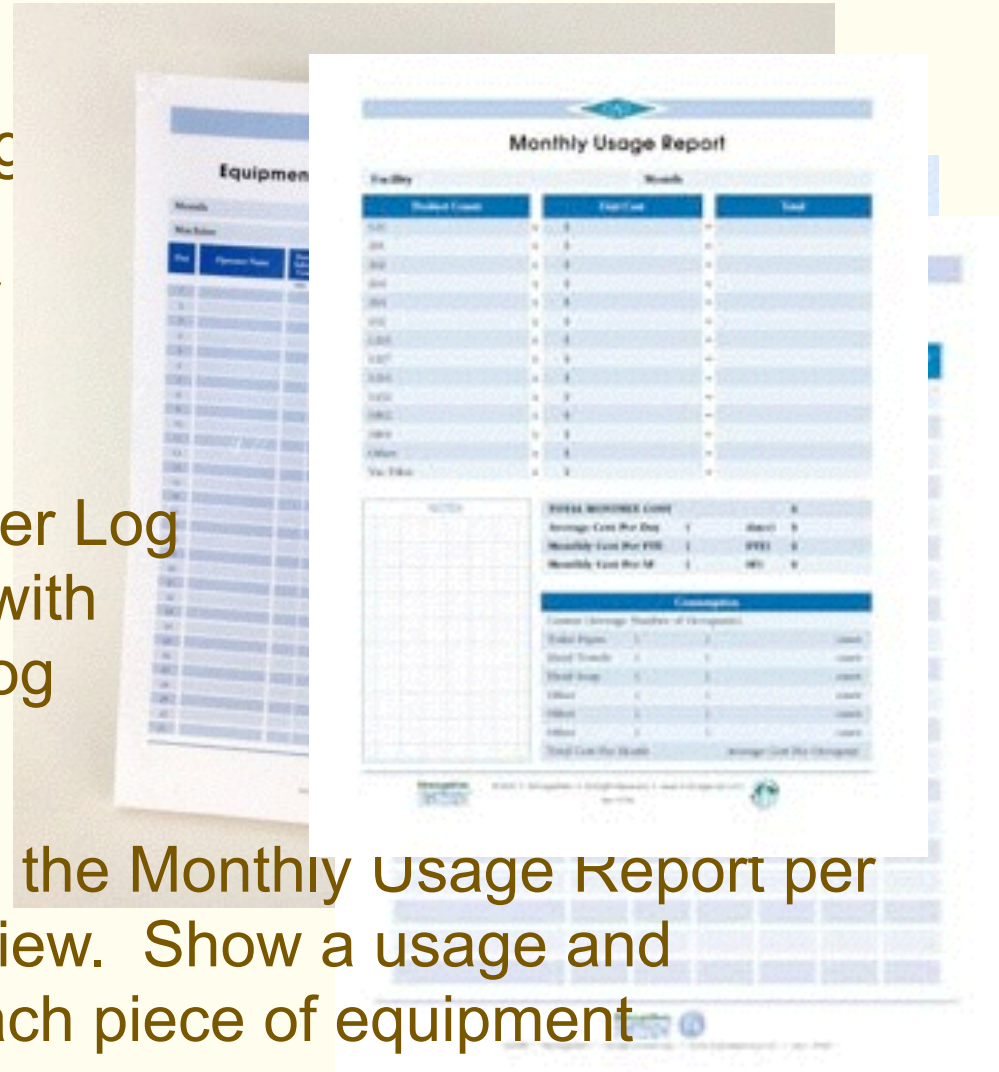
Ensure that the Daily Kitting Safety Log and Equipment Logs are filled out correctly

Performance Activities:

Maintain the Solution & Filter Log book. Monitor Equipment with the Equipment Inventory Log

Success Measures:

Have less than 5 errors on the Monthly Usage Report per month by the mid-year review. Show a usage and maintenance history for each piece of equipment



Performance Goal:

Work with your manager to ensure the highest possible level of compliance with (OS1) standards

Performance Activity:

Use the (OS1) training material and attend the (OS1) re-tuning sessions

Success Measures:

Show an improving trend: score at least 80% on the TCS by the mid-year review. Score at least 90% by the next annual review



Wake Forest University			
Manager/Assistant Manager Team Checklist Summary			
	YTD %	90%	100%
1. Demonstrate team spirit			
2. Demonstrate team spirit			
3. Demonstrate team spirit			
4. Demonstrate team spirit			
5. Demonstrate team spirit			
6. Demonstrate team spirit			
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Performance Goal:

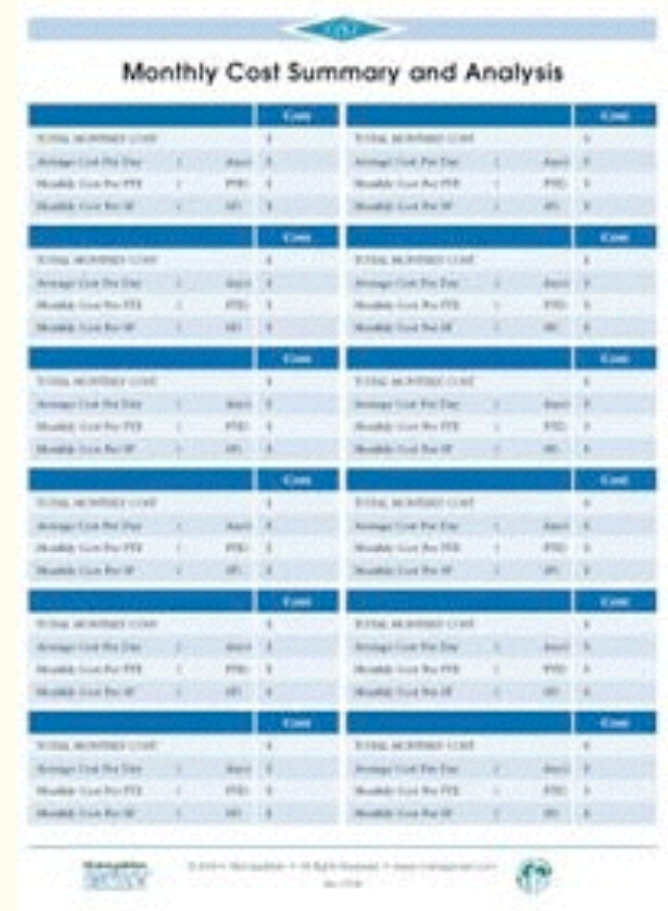
Prepare a Monthly Cost Summary and Analysis form for each building every month

Performance Activities:

Summarize the data from the MUR submitted by your team leaders. Ensure that all forms submitted to you are complete and error free

Success Measures:

Have fewer than 3 errors per month by the next annual review. Be able to explain variances



Monthly Cost Summary and Analysis			
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0
	Cost		Cost
WORLD HEADQUARTERS LEAD	0	WORLD HEADQUARTERS LEAD	0
Average Cost Per Day	0	Average Cost Per Day	0
Monthly Cost Per FTE	0	Monthly Cost Per FTE	0
Monthly Cost Per SF	0	Monthly Cost Per SF	0

Performance Goal:

Ensure that all Team Leaders turn in the required Team Checklists each month

Performance Activities:

Use the Team Checklist Log sheet and Team Checklist Master Summary to track compliance

Success Measures

with 80% compliance by the mid-year review, and 90% compliance by the next annual review.



The image shows a screenshot of a spreadsheet titled "Team Checklist Master Summary". The spreadsheet has a header row with columns for "Date", "No.", "Yes", "No", "N/A", and "Comments". Below the header, there are multiple rows for data entry, with the first few rows containing dates from 1/1 to 1/10. The spreadsheet is used for tracking compliance with team checklists.

Date	No.	Yes	No	N/A	Comments
1/1					
1/2					
1/3					
1/4					
1/5					
1/6					
1/7					
1/8					
1/9					
1/10					

Performance Goal:

Present one Baker's Dozen lesson by the next annual review

Performance Activities:

Have your topic chosen and an outline by the mid-year review

Success Measures:

Elicit feedback from your class

