

WRITING
PERFORMANCE EXPECTATIONS

PARTICIPANT'S MANUAL

Comprehensive Public Training Program (CPTP)

State of Louisiana

WRITING PERFORMANCE EXPECTATIONS

Comprehensive Public Training Program (CPTP)

Sponsored by the Louisiana State Civil Service

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WRITING PERFORMANCE EXPECTATIONS

COURSE DESCRIPTION

This class will allow participants to develop the skills needed to write performance expectations in order to identify responsibilities, priorities and measurable goals. The course will also allow supervisors to engage their employees in the expectation writing process and effectively link agency objectives with employee expectations of performance.

JOB OUTCOMES

- Communicates ideas and facts in writing in a clear and organized manner.
- Builds productive working relationships with key individuals and groups.
- Understands job expertise needed by subordinates to do their work.
- Sets performance expectations for subordinates and gives timely feedback about progress.
- Creates a direction for the work group that fits with the department's vision.

LEARNING OBJECTIVES

- Review the performance management process.
- Differentiate between results, actions, and behaviors in drafting performance expectations.
- Develop key actions for clarifying performance expectations.
- Understand the difference between performance objectives and performance standards.
- Effectively use the SMART method of drafting performance expectations.

WRITING PERFORMANCE EXPECTATIONS

① Performance Planning	② Observing Performance	③ Performance Review and Rating
Establish, clarify, and communicate individual performance expectations with an employee. *This class will focus on one aspect of the planning process - Writing Performance Expectations.	Continual performance observation, coaching, documenting and feedback. Measuring performance on the established expectations for the rating period.	Provide performance feedback in the PPR rating session to reinforce or change behavior.

The performance planning stage of the appraisal process is a critical stage of the cycle. Like with anything else in the workplace, proper planning will help to ensure that expectations are communicated, that standards of performance are established, and that employees have a clear understanding of how they will be measured and assessed. Most importantly, setting performance expectations eliminates the one thing that all employees and supervisors dislike the most – surprises. The PPR process should effectively construct a benchmark for performance and evaluation which will allow an employee to consistently track their performance against a mutually determined standard.

The PPR process is classified under the performance management umbrella. Performance management is one of the key processes that, when effectively carried out, helps employees know that their contributions are recognized and acknowledged. Performance management is an ongoing process of communication between a supervisor and an employee that occurs throughout the year, in support of accomplishing the strategic objectives of the organization. The communication process includes clarifying expectations, setting objectives, identifying goals, providing feedback, and evaluating results.

An effective performance management process sets the foundation for rewarding excellence.

- By linking individual employee work efforts with the organization's mission and objectives, the employee and the organization understand how that job contributes to the organization.
- By focusing attention on setting clear performance expectations (results + actions & behaviors), it helps the employee know what needs to be done to be successful on the job.
- Through the use of objectives, standards, performance dimensions, and other measures it focuses effort. This helps the department get done what needs to be done and provides a solid rationale for eliminating work that is no longer useful.
- By defining job-mastery and career development goals as part of the process, it makes it very clear how the current position supports employee growth and the additional opportunities the employee needs to explore.
- Through regular check-in discussions, which include status updates, coaching, and feedback, it promotes flexibility, allowing the supervisor and the employee to identify problems early and change the course of a project or work assignment.
- By emphasizing that a quarterly appraisal should simply be a summary of the conversations held between you and the employee during the entire cycle, it shifts the focus away from performance as an "event" to performance as an on-going process.

An effective performance management process, while requiring time to plan and implement, can save the supervisor and the employee time and energy. Most importantly, it can be a very effective motivator, since it can help you and the employee achieve the best possible performance.

PERFORMANCE EXPECTATIONS

To perform well, employees need to know what is expected of them. The starting point is an up-to-date job description that describes the essential functions, tasks, and responsibilities of the job. It also outlines the general areas of knowledge and skills required of the employee to be successful in the job.

Performance expectations go beyond the job description. When you think about high quality on-the-job performance, you are really thinking about a range of expected job outcomes, such as:

- What goods and services should the job produce?
- What impact should the work have on the organization?
- How do you expect the employee to act with clients, colleagues, and supervisors?
- What are the organizational values the employee must demonstrate?
- What are the processes, methods, or means the employee is expected to use?

In discussing performance expectations an employee should understand why the job exists, where it fits in the organization, and how the job's responsibilities link to organization and department objectives. This process is commonly referred to as connecting the dots - an employee must understand how their role directly impacts the organization. The following activity should help to illustrate this point.

Group Activity

What: Connecting the Dots

How: Review the following scenario, and as a group, determine the direct impact which the employee has on the organizational mission and goals.

The Department of Transportation and Development (DOTD) has the following stated mission:

To deliver transportation and public works systems that enhances quality of life and facilitates economic growth and recovery.

And has the following goals:

- *Continually improve the performance of DOTD.*
- *Deliver cost-effective products, projects, and services in a timely manner.*
- *Improve customer service and public confidence.*
- *Effectively develop and manage our human resources.*
- *Efficiently manage DOTD's financial resources.*

Marc is a Training and Development Specialist at the DOTD who is responsible for training all employees on effective human resource practices, policies, and procedures. He travels throughout the state providing training programs for all employees on topics such as sexual harassment, substance abuse, how to conduct PPR training, controlling absenteeism, and other human resources topics. Given his role, and the mission statement above, connect the dots for Marc with respect to the agency's mission and goals. How does Marc's role support the work outputs of the DOTD?

The range of performance expectations can be broad, but can generally be broken into two categories:

- **Results** - The goods and services produced by an employee often measured by *objectives* or *standards*.
- **Actions & Behaviors** - The methods and means used to make a product and the behaviors and values demonstrated during the process. Actions and Behaviors can be measured through *performance dimensions*.

Performance Expectations = Results + Actions and Behaviors

Performance expectations serve as a foundation for continuously communicating about performance. They also serve as the basis for assessing employee performance. When a supervisor and an employee set clear expectations about the results that must be achieved and the methods or approaches needed to achieve them, they have established a path for success.

Defining Results - SMART Expectations

Performance objectives and standards are two of the most common methods to define expected results. Both objectives and standards are most useful when, in addition to being written down and verifiable, they are:

- **Specific** - Objectives and standards should let employees know exactly which actions and results they are expected to accomplish.
- **Measurable** - Whenever possible, objectives and standards should be based on quantitative measures such as direct counts, percentages, and ratios.
- **Attainable** - The objective or standard should be achievable, but challenging, and attainable using resources available.
- **Relevant** - Individual goals, objectives and standards should be in alignment with those of the unit and the department in support of the agency's mission.
- **Timely** - Results should be delivered within a time period that meets the department and organization's needs.

Objectives and standards identify baselines for measuring performance results. From performance objectives and standards, supervisors can provide specific feedback describing the gap between expected and actual performance.

Class Discussion

Topic: SMART Expectations

Discussion: What benefit do you believe that writing SMART expectations brings to the employee, the supervisor, and to the agency?

Notes:

Group Activity

What: SMART Expectations

How: Given the SMART method of writing expectations, craft a minimum of three expectations that are written in SMART language. The expectations should be for a position that you directly supervise. Be prepared to share these with the class.

Notes:

Performance expectations should also quantify at least one of the following measurements: time, quantity, quality, and/or cost.

Measure	Defined	Best Use
Time	A timeframe in which a project, task, process, etc. is to be completed.	<p>When work is standardized or repetitive and needs to be consistent.</p> <p>When work must be achieved to meet a Department, State, or Federal timeline.</p>
Quantity	A desirable amount that should be maintained, increased, or decreased.	<p>When work is standardized or repetitive.</p> <p>It the quantity to be produced varies, the amount is referred to as “assigned.”</p>
Quality	A standard that defines the conditions in which the work is to be completed.	<p>When work needs to be achieved according to a stated policy from the Department, State, or Federal government.</p> <p>When the quality criteria varies each time but is stated and agreed to by both the employee and customer.</p>
Cost	A desired amount within which a project, task, process, etc. is to achieve or be completed.	<p>When a specific budget has been allotted for the completion of the work.</p> <p>When a target amount is identified that maintains the budget limits of that section or unit.</p>

Objectives and Standards

It can be very useful to define both objectives and standards for a position, but it is not necessary. Standards are directly linked to job-task completion; whereas, objectives are broader in scope, go beyond day-to-day standards, and are clearly linked to helping the organization or department meet its goals and objectives. The following are examples of each:

- **Standard:** Ensure that all grant requests are written, reviewed, and submitted to the granting agency by the required deadlines.
- **Objective:** Identify three new grant/funding sources by the end of FY 2009.

In some cases, the supervisor and the employee may find it better to set a series of standards with only a few objectives, while in other situations it may make more sense to set objectives alone. The decision to employ either, or both, should be made after a review of the job description and any other extant data sources available which directly impact the performance of the employee. The following chart presents some standard advantages and disadvantages of each.

Standard Advantages	Standard Disadvantages	Objective Advantages	Objective Disadvantages
Ties the unit/organization's objectives to employee's objectives.	Can focus on annual results, while ignoring routine aspects of job.	Tied to job duties and responsibilities.	Can become too task oriented.
Specific to the individual.	Care must be taken to ensure objectives are realistic.	Best when applied to any employee performing the same job duties.	Less flexible when responsibilities of a position change.
Facilitates employee and supervisor communication.		Facilitates communication.	If standards are not reviewed and updated regularly, it can hold the employee and unit back.
Future oriented.	Can be compromised by changing circumstances.	Makes it very clear how performance will be measured.	May not provide enough challenge for employee.
Flexible.	Too much flexibility.	Standards can exist for any job.	Takes time to develop.
Can be put into place for all employees, but more easily used for employees with a broader scope of responsibilities, and a mixture of non-routine and routine work.	Must be consistent with culture and can be time consuming to implement a fully integrated system.	They are also more easily put into place for jobs that have a large number of routine tasks required.	

Performance Objectives

A performance objective is a future state of achievement that helps the organization succeed and create value. It is a direct link between the work an employee does and the department and organization's overall objectives and mission. As the organization's needs change and direction shifts, so will an employee's performance objectives.

- Performance objectives express mutually understood agreements for results that an employee is expected to produce *during the performance assessment period*.
- Performance objectives are not separate from an employee's job, but part of the job.
- Performance objectives are "ends" towards which you and your employee direct effort and focus resources.

For these reasons it is best not to dictate objectives, but set them through discussion, negotiation, compromise, and agreement.

Objectives force the supervisor and the employee to think of planning for *results*, not just planning *activities*. Identifying objectives encourages both to continually look for ways to improve overall department effectiveness and efficiency, and link individual and departmental operations and results to the overall planning and mission of the agency. Objectives set through a collaborative process between the employee, supervisor, and department will elicit commitment.

Performance objectives are usually written in the following format:

To [Action verb] [Key Result] by [Date] at [Cost of (if applicable)]



Notice that each statement is comprised of an action verb or key result, a date, and a cost if one is associated with the task. Also, it is important to write one objective per task, and not group two or more into one performance objective. This makes measurement of performance easier to accomplish.

The following questions may help generate ideas for performance objectives. Based on departmental/unit objectives:

- What can this employee do to improve the overall effectiveness of the work unit?
- Has the employee suggested program or process changes that help us meet our objectives and can be completed during the appraisal period?
- What needs to be done to improve the quality of our service? What refinements can we make to our operations? What needs to be introduced or eliminated?
- What are we ready to do now that we could not do last year (due to increased resources, system modifications, changed priorities, updated skills, etc.)?
- What skills, processes, products must be updated to meet client demand?

The supervisor and the employee should collaborate on setting these performance objectives. Some other key considerations include:

- Set short-term goals with a long-term view. Objectives are generally set for periods of a year or less, which may sacrifice long-term gain to generate results in the short-term.
- Identify critical issues and possible obstacles.
- Do not underestimate resource needs.
- Build in flexibility. Regular status update and check-in meetings make it much easier to identify problems or shifts in unit priorities and change course.

Examples of performance objectives:

- Implement update of on-line filing application program by October 1, 200x
- Reduce telephone expenses by 15% within the first half of the fiscal year.
- Identify three new funding sources by the end of FY 200x, and ensure that all grant requests are written, reviewed, and submitted to the granting agency/foundation by the respective deadlines.

Individual/Group Activity

What: Writing Performance Objectives

How: Turn to the last pages in the manual and review the job descriptions included. Select one. For this position, individually draft five performance objectives which fit within the parameters of the job described. Share your results with the group. As a group, discuss each of the objectives presented and select the most appropriate ones to post on chart paper.

Objective 1:

Objective 2:

Objective 3:

Objective 4:

Objective 5:

Group Objectives:

Performance Standards

Standards describe the conditions that must exist before the performance can be rated satisfactory (meets expectations). Performance standards are approved expressions of the...

- Performance threshold(s),
- Requirement(s), or
- Expectation(s)

...that employees must meet to be assessed at particular levels of performance.

A standard focuses on task *completion*. It is specifically tied to duties/responsibilities. A performance standard should:

- Be realistic, in other words, attainable by any qualified, competent, and fully trained person who has the authority and resources to achieve the desired result.
- Be “exceedable.” Employees should know that they can and should exceed expectations. Standards should not be used as an excuse to maintain the status quo if change is needed.
- Describe the conditions that exist when performance meets expectations.
- Be expressed in terms of quantity, quality, time, cost, effect, manner of performance, or method of doing.
- Be measurable, with specified method(s) of gathering performance data and measuring performance against standards.

Performance standards should be written for each key area of responsibility on the employee's job description. Focus on tasks that have the greatest importance; *it is not necessary to write standards for every task.*

Standards are usually established when an assignment is made, and should be reviewed if the employee's job description is updated. Whenever possible, have employees participate in developing standards. The discussion of standards should include the criteria for achieving satisfactory performance and the proof of performance (methods you will use to gather information about work performance).

In departments where more than one person does the same task or function, standards may be written for the parts of the jobs that are the same and applied to all positions doing that task. This allows for uniformity amongst staff, and ensures that performance standards are equitable for all employees performing a function.

Standards are written in a different style from objectives. The terms for expressing performance standards are outlined below:

- **Quantity:** specifies how much work must be completed within a certain period of time.
 - Conducts 5 external audits per month.
- **Quality:** describes how well the work must be accomplished. Specifies accuracy, precision, appearance, or effectiveness.
 - 95% of documents submitted are accepted without revision.
- **Timeliness:** answers the questions: By when, how soon, or within what period.
 - All work orders completed within five working days of receipt.
- **Effective Use of Resources:** used when performance can be assessed in terms of utilization of resources: money saved, waste reduced.
 - The tax audit will be completed with only internal resources.
- **Effects of Effort:** addresses the ultimate effect to be obtained; expands statements of effectiveness by using phrases such as: so that, in order to, or as shown by.
 - Establish inventory levels for storeroom so that supplies are maintained 100% of the time.
- **Manner of Performance:** describes conditions in which an individual's personal behavior has an effect on performance.
 - Assists other employees in the work unit in accomplishing assignments.
- **Method of Performing Assignments:** describes requirements; used when only the officially-prescribed policy, procedure, or rule for accomplishing the work is acceptable.
 - Unemployment Forms are completed in accordance with established agency procedures.

Group Activity

What: Writing Performance Standards

How: Using the performance objectives you drafted previously, write two (2) performance standards for each of the objectives. Share these with your group. As a group, return to the group objectives you wrote earlier and draft two performance standards for each objective. Add these to the chart paper you created earlier.

Objective 1	Standard:
	Standard:
Objective 2	Standard:
	Standard:
Objective 3	Standard:
	Standard:
Objective 4	Standard:
	Standard:
Objective 5	Standard:
	Standard:

Group Activity

What: Correcting Performance Expectations

How: Review the following expectations and rewrite them to reflect the standards that have been discussed in class.

Poor: Provides good customer service.

Good:

Poor: Processes claims in a timely manner.

Good:

Poor: Complete purchase authorizations.

Good:

Poor: Provides customer service classes as requested.

Good:

Actions and Behaviors

In addition to objectives and standards (which focus on end results) it is important to consider other aspects of performance. As discussed earlier, *Performance Expectations = Results + Actions & Behaviors*.

Understanding the actions and behaviors that employees can use to perform the job is often as important to success as end results. Behavior is the day-to-day activity in which people engage to produce results and relates closely to the process side of work.

Focusing on the way people go about their work is based on the belief that doing things correctly will lead to positive organizational results. However, many actions and behaviors are not easy to measure. For this reason, managers and employees should discuss difficult to quantify aspects of performance in terms that are:

- Specific,
- Observable,
- Job-related, and
- Behavioral.

When described in this way, behaviors and actions can be grouped into *performance dimensions* that can be used to assess job performance. For example, if success in meeting an objective such as “implement update of on-line filing application program by October 1, 2009” requires strong interpersonal skills, then the employee should know that they will have to build solid relationships, collaborate, and incorporate ideas and suggestions made by colleagues. Performance will be assessed on how well behaviors associated with the dimension, interpersonal skills, are demonstrated in reaching the objective.

Performance dimensions are defined based on the job and the work itself. Creating performance dimensions start with the job and states the range of behaviors employees must exhibit to successfully meet or exceed job expectations. These behaviors are then grouped into broad categories that are called “dimensions.” Performance dimensions help answer the question: “How does someone act and/or behave when s/he does the job well?”

Since dimensions are broad categories, a specific dimension generally applies to any employee working in a given job. It is also possible for departments and units and even entire organizations to have dimensions that apply to any employee who works in the group.

PPR categories where performance dimensions may be found on the LWC PPR include:

- Dependability
- Cooperativeness
- Adaptability
- Communication
- Daily Decision-Making/Problem Solving
- Service to Clients/Public
- Work Group Management and Leadership

Performance dimensions focus on the *actions* that need to be taken by anyone doing that job to get the work done. As discussed above, performance dimensions are groupings of behaviors/actions and are defined based on the requirements and expectations of the job.

In contrast, a competency is a cluster of knowledge, skills and abilities that describes a general trait that an employee has or should have to perform a job. While competencies relate to the individual, performance dimensions relate to the job.

For example, a performance dimension for a Budget Analyst's position may be to "Prepare budget documents and reports." It will then be useful to measure how well an employee holding the job:

1. "Presents information in a clear, concise manner that illustrates budget issues that need to be resolved."
2. "Produces timely budget documents and reports that are tailored to each customer's needs."
3. "Frequently uses graphics and other aids to summarize and synthesize data."

Group Activity

What: Actions and Behaviors

How: Given the objectives and performance expectations that you have already created from the job description previously, draft 2 SMART actions and behaviors, which can be measured, for each of the objectives. Add these to the chart list already created.

Objective 1	Action/Behavior:
	Action/Behavior:
Objective 2	Action/Behavior:
	Action/Behavior:
Objective 3	Action/Behavior:
	Action/Behavior:
Objective 4	Action/Behavior:
	Action/Behavior:
Objective 5	Action/Behavior:
	Action/Behavior:

VERIFYING EXPECTATIONS

Performance expectations should be verifiable. Early in the performance management cycle, a supervisor, with input from the employee, should identify how and where evidence about the employee's performance will be gathered.

Measurable (quantitative) expectations are the easiest ones to verify. Frequently, however, expectations cannot be put into measurable terms easily or accurately. At this point, consider developing qualitative expectations, which can generally be made verifiable by spelling out the criteria to be fulfilled, behaviors to be demonstrated, and/or target dates to be met.

Specifying how performance expectations will be verified at the time the responsibility is assigned helps employees keep track of their progress and makes check-in meetings and performance status updates much more focused and efficient.

There are many ways to verify performance; some of the most common are:

- Specific work products (tangible evidence that can be reviewed without the employee being present).
- Reports and records, such as attendance, safety, inventory, financial records, etc.
- Checklists that can be completed by a client or supervisor listing specific, observable criteria that need to be met in order for an expectation to be considered complete. Criteria usually require a “yes” or “no” answer, such as: “implement a new program by [x] date.”
- Direct observation.
- Rating scales that define, as precisely as possible, behaviors at different levels of performance (behaviorally anchored rating scales).
- Commendations or constructive or critical comments received about the employee's work.

Group Activity

What: Verifying Expectations

How: Given your group work to this point, devise a systematic plan to verify the expectations and objectives which you have drafted. How will you verify that they are correct? Determine one main method, an alternative method, should that fail, performance measurements, and a timeline (when will you measure) for measurement.

Method	Performance Measures	Timeline

Notes:

REFERENCES

University of California, Berkley, (2008). Guide to managing human resources. Retrieved August 11, 2009, from Human Resources Web site:
<http://hrweb.berkeley.edu/GUIDE/performance.htm>

Job Description One

Job: ORS Specialist

Percent	Duty
75%	Conducts fact finding regarding potential issues on unemployment insurance claims by making direct calls or corresponding with local offices, claimants, employers and other interested parties relative to the issues involved. Finds the facts, applies the facts to Employment Security Law, interprets the law, and draws conclusions. Renders independent written non-monetary decisions that set forth facts and reasons for the decision, the applicable law and the decision rendered.
10%	Examines correspondence and takes necessary action that may require the placement of temporary stop payment claims.
3%	Inputs written non-monetary decisions on issues to initiate the mailing of decisions to claimants and employers.
5%	Attends formal and informal training session on procedure changed, rules, regulation, instructions and laws.
5%	Participates in performance appraisal sessions addressing the quality and quantity of work performance.
1%	Performs additions duties as assigned by supervisor.

Job Description Two

Job: Admin Program Specialist A

This position serves as the administrative specialist providing journeyman level support to implement Office of UI Administration programs and to fulfill the requirements of Custodian of Records. Requires a thorough knowledge of Employment Security law and procedures pertaining to the dissemination of unemployment insurance records.

Percent	Duty
85%	<p>Receives requests for copies of UI records, receives payment for copies of requested documents, maintains records of payments and schedules, develops and documents procedures for dissemination of records. Participates in developing and updating fee schedules, accounts for receipts, including the calculation and collection of record fees, maintains fee logs, and prepares deposits of funds in cooperation with the Office of Management and Finance/Fiscal Unit.</p> <p>Solely responsible for providing documentation to entities outside the agency and ensuring consistency in the application of criteria regarding the release of records. Contact is generally at high levels in private enterprise, such as legal firms, and in other governmental agencies. Must exercise the highest level of privacy for persons served by the agency, while balancing the needs of those entities requesting records.</p> <p>Evaluates each request for authenticity and applicability, as well as for need to know, right to know, and the individual right of privacy. Secures consent waivers, determines sources of documents and compiles and/or supervises the compilation of requested documents.</p>
5%	<p>Analyzes overpayment data, determines eligibility for Administrative Waivers, compiles documentation, solicits additional information as needed on individuals eligible for waiver and refers findings to Waiver Board for final disposition.</p>
5%	<p>Compiles time lapse data and types monthly time lapse letter. Distributes data to all offices and the Director.</p>
3%	<p>Maintains time and leave records. Reviews documents for completeness and accuracy. Functionally supervises staff on proper coding and timely submission of documents. Reconciles discrepancies and submits appropriate documentation to HR for correction. Inputs time records into SAP payroll system.</p>
1%	<p>Provides technical assistance, as needed. If necessary, testifies in court as to the accuracy and veracity of agency records.</p>
1%	<p>Coordinates and assists with equipment inventory, equipment repairs, requests for new equipment, and performs other duties as needed.</p>

Job Description Three

Job: Procurement Specialist 1

The incumbent for this position serves as a staff specialist in the central Purchasing Office of the Louisiana Workforce Commission, advising management and supervisors within the Department in all areas of purchasing and procurement of goods and services. Assists the Procurement Manager in procurement of over six (6) million dollars in goods and services.

Percent	Duty
70%	Handles complex procurement activities involving the purchase of supplies, equipment, and services. Responsible for ensuring compliance with State Purchasing rules and regulations. May develop proposals for complex Contractual Services. May recommend modification to existing contracts to meet departmental needs as necessary. Edits and compiles design and performance specifications for a wide variety of technical, non-routine supplies and equipment. Develops vendor lists. Assists in opening, tabulation and analyzing bids and initiative award of the purchase order. Confirms delivery and determining special conditions when necessary.
15%	Confers with and advises agency official, managers and supervisor on purchasing matters.
5%	May represent the unit at staff meetings and other functions in the Procurement Managers' absence.
5%	May travel as needed, statewide, to audit purchasing procedures, resolve problems and make recommendations for improvements. May also attend professional purchasing conferences and workshops.
5%	Will perform other similar duties as needed.