

Desktop Manual Workshop

Follow the yellow brick road for workplace success.



New Mexico Public Education Department
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Your QAB Facilitator



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What About You?

- Name
- Bureau
- Years at PED
- Your favorite Wizard of Oz character or scene



Workshop Menu

- Definitions
- Benefits
- Basic Design
- How-to's
- Maintenance
- Technical Assistance



Desktop Manual— What Is It?



A binder or R-Drive Folder that contains key documents and work procedures.

Desktop Manual (DTM)

- Guidebook to your desk
- Based on your Position Assignment Documentation (PAD)
- Answers questions:
 - *What is my job?*
 - *What skills/procedures do I use?*
 - *What routines do I do on a daily/weekly/monthly basis?*
 - *What resources are handy?*



Benefits

- Instilled standards
- Increased communication
- Increased efficiency
- Organized, predictable
- Specifies what it means to be an employee with this Bureau or in this position

And More. . .

- Central point for managing information
- Simplifies the task of succeeding
- Provides every team member access to all relevant information
- Defines Bureau culture



**Power comes when you make life
predictable for people.**

~ Howard Stevenson, *The First Days of School*

Design—the Map

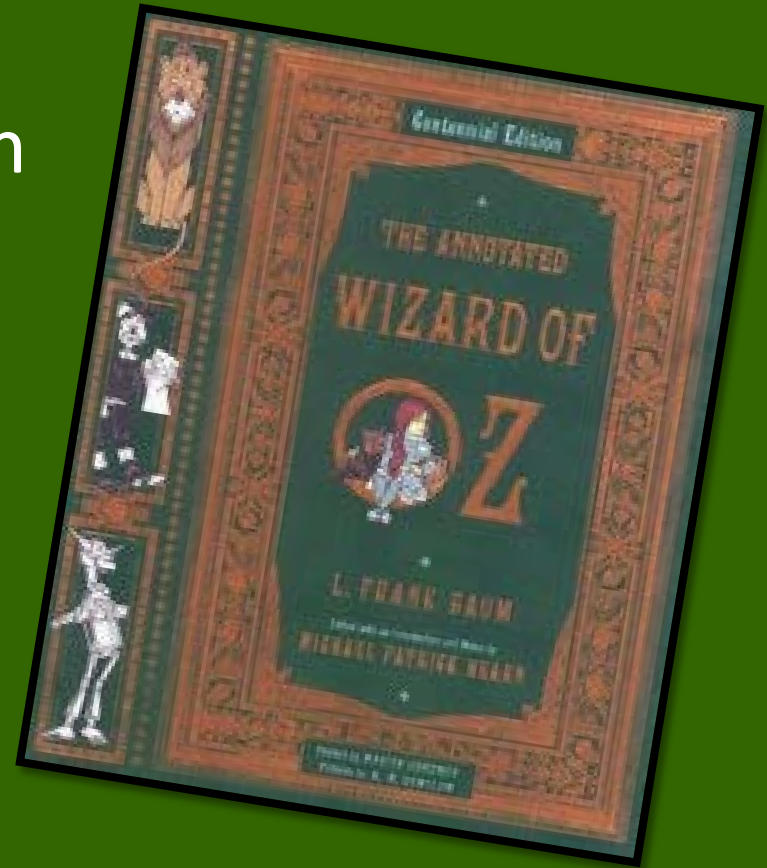
What do I need?

- PAD- Position Assignment Documentation (Also known as your PAQ)
- Workflow Review & Tally Sheet
- Resources



Sections of the DTM

- Table of Contents
 - Organizational Information
 - About you and your position
 - Tasks and Activities from PAD
- Bureau Section
- Office Procedures
- Directories
- Appendices



Tweaking it to Make It Your Own

*How do I
build
my manual
around my
PAD?*



Where do I start?

- **Step 1:** Obtain a copy of your PAD from HR or your Supervisor.
- **Step 2:** Look at your Job Assignments & Tasks. Organize your Tasks by importance by using the Workflow Review & Tally Sheet.
- **Step 3:** Develop the sections for your manual around each Task and Activity listed in your PAD and on your Workflow Review & Tally Sheet.

Tips

- Each section should contain the resources that you use daily such as phone lists, VIP contacts, resources, statutes, rules and regs, etc.
- **Large documents** can be kept electronically OR in a separate binder as a hard copy.



Step 1

Day One	
Task	Resource
Send out reminder email to Superintendents regarding length of	NMAC, Statute, Comments from General Counsel
	ents nase PED Webmaster Protocol, Notes from meeting with NMORR

3 PURPOSE STATEMENT (A BRIEF STATEMENT OF WHY THE POSITION EXISTS AND WHAT THE POSITION IS PAID TO PRODUCE)

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4 PROVIDE THREE TO FOUR MAJOR JOB TASKS AND DESCRIBE HOW THE TASKS ARE ACCOMPLISHED

- █
- █
- █
- █

5 DOES THIS POSITION SUPERVISE OR MANAGE TWO OR MORE POSITIONS (INCL. RESPONSIBILITY FOR PERFORMANCE EVALUATION)?
 Yes No

6 DESCRIBE THE TYPICAL DECISIONS THAT THIS POSITION IS RESPONSIBLE FOR

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7 DESCRIBE THE MOST CHALLENGING ASPECTS AND TOUGHEST PROBLEMS FACING THIS POSITION

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Tasks & Activities

Tally Sheet

My Most performed tasks are:

My least performed tasks are:

These will be sections of your manual

These will be sections in other binders or on the R-Drive

These will be sections in other binders or on the R-Drive

once a month	quarterly	bi-annually	yearly

How to Organize

- Find an empty 2-inch or smaller, 3 ring binder.
 - Why 2 inches or smaller? Anything bigger is cumbersome, not user friendly, and is hard to carry with you to meetings.
- Print out divider pages with the title of each section (based on your PAD and your Workflow Review).

What extra sections should I add?

- Office/Bureau Procedures
- Directories
- Appendix



Extra Sections

- Department/Division/Bureau Values
- Mission
- Organizational Chart
- Policies & Procedures
- Action Plans/Frameworks
- Protocols
- Directories
- File System



Appendix

- Your appendix should include the location of other binders or folders on the R-Drive.
- This should be a ONE- to TWO-page document that guides you and others to supplementary materials that either don't fit in your DTM or you don't use very often.

Maintenance—

Keeping your DTM skills sharp

- Managers—
 - Designate one person to maintain the Bureau's master DTM.
 - Update current employees on any changes.
- Review your personalized Desktop Manual at least once a year to ensure that it is updated.



The DTM—The Scarecrow's Ideas



- New Hires
- Cross Train
- Position Consistency
- EDA Self Review
- Institutional History



Employee Evaluation Performance Rating Descriptions

EDA/EEP

Performance Rating Area	Description
Customer Service	Works effectively with internal and external customers to achieve desired work results and maintain positive relationships.
Productivity/Dependability	Completes assigned work in a timely manner and meets established attendance requirements.
Interpersonal Skills	Establishes and maintains effective work relationships. Demonstrates good communication and listening skills.
Quality	Achieves consistency, thoroughness, and accuracy on assigned work and projects.
Job Knowledge	Demonstrates the knowledge and skills needed for job assignments.
Adaptability/Flexibility	Adapts to change and is open to different and new ways of doing things.
Work Environment/Safety	Promotes a respectful workplace and complies with general conditions of employment, security and workplace safety standards.
Use of Equipment/Materials	Uses equipment and materials safely, for their intended purpose, and consistent with applicable policies and procedures.

Face-to-Face Workshop

- Coming soon to Mabry Hall in May 2010
- Stay tuned. . .



If you get stuck or frustrated, call me...



Don't Forget. . .

If your manual gets too heavy to carry... it is TOO BIG.

Break it up into using your appendix or use the R-Drive.



Thanks for participating!

