

January 17, 2008

MEMORANDUM

TO: Executive Director  
National Director, Rider Education  
National Director, Membership Enhancement  
National Director, Leadership Training  
Region Operations Directors

FROM: Senior National Director

SUBJECT: Progress Review Program

Attached for your review and comment is the proposed Progress Review Program as announced in our January National Operations Council Meeting. This will be one of the agenda items discussed at the July 1 National Operations Council Meeting preceding Wing Ding. Please review it carefully in advance of that meeting and be prepared with your questions and comments. If you have questions or comments in advance of that meeting, feel free to contact me.

While I'm comfortable with the program as proposed, I'm also sure your input will be invaluable in closing any loopholes we may have missed. As I mentioned in January, I believe this program is a giant step forward with respect to improving communications and thus operations, and thus Member services across the board. It is easier to use, more positive, more appropriate for use in an organization like GWRRA, and less threatening than other programs used in the past.

I appreciate those of you who provided assistance and input, particularly Curt Dixon our Leadership Training Director who provided the basic framework for what you see in the draft program. This was and is a tricky project to complete and your past and continued support makes a great difference.

I look forward to seeing each of you again at Wing Ding and am confident that we will be able to reach closure on this and add it to the leadership tools we will use to make GWRRA a better organization.

Sincerely,

# LEADERSHIP TRAINING BULLETIN 97-03

## -- PROGRESS REVIEW GUIDELINES --

*Recognition Without Measurement Is Meaningless  
Direction Without Accomplishment Is Pointless  
Leadership Without Either Is Impossible*

### **OVERVIEW:**

The Progress Review Program is a goals-based, results-oriented approach to measuring activity and accomplishment. It consists of a series of individualized discussions between an appointing officer and their subordinate leaders, and constitutes a positive and non-threatening approach to providing direction and reviewing individual accomplishment. The form to be used for documenting goals and accomplishments is attached for reference.

GWRRRA Progress Reviews are conducted for the purpose of :

- Setting Goals
- Discussing Plans and Progress
- Providing Training and Assistance
- Reviewing and Recognizing Accomplishment

This program supersedes and replaces all previous evaluation programs. It will be used in all GWRRRA Divisions at all levels, effective October 1, 1997.

*In a nutshell, leaders will meet at least twice yearly with those for whom they have responsibility. The first discussion will focus on reviewing the goals and documenting accomplishments for the previous 6-12 month period, and setting new goals for the upcoming 6-12 month period. The second discussion is a mid-point review of progress being made on the current set of goals.*

### **DEFINITIONS:**

For purposes of implementing this program the following terms and definitions apply:

- Goal Areas: The grouping of goal statements, e.g., Member Service, Teamwork, etc.
- Goal Statements: The narrative describing the goal, e.g., Regular social activities are conducted.
- Goal Rating: The number assigned by the reviewer to a given goal statement.
- Fundamental Goals: Standard goal statements considered integral to the basic success of an officer.

- Functional Goals: Goal statements established or adopted by the leaders involved in the review.
- Summary Rating: The rating assigned as a result of the review meetings at the year-end review.
- RED: Rider Education Division
- MED: Membership Enhancement Division
- LTD: Leadership Training Division

### **APPROACH:**

Goal areas have been identified that are Member/service oriented and aligned with the ideals and philosophies of GWRRA. Some goals/goal-areas are considered fundamental to being successful. These are standardized and included in all reviews. In addition, all reviews will include functional goals that are developed by those being reviewed and tailored to meet their own local needs. The number of functional goals and goal areas may be adjusted to focus on different areas of emphasis depending on the responsibilities of the leader being reviewed and the local situation.

Because those directly involved in the review process will have the opportunity to establish goals tailored for themselves and their situation, this common sense approach to measuring and motivating our volunteer leaders will:

- Result in a more positive program that is better and easier to use;
- Encourage higher quality and more productive discussions between leaders;
- Increase the leader's motivation to succeed because all parties have a personal stake in accomplishing the goals.

### **RATIONALE**

The fact that GWRRA is a volunteer based organization does not relieve it's leaders of their responsibility to use proven management techniques in carrying out their responsibility to provide the highest quality services to the Members. In fact, it is precisely because we depend on volunteerism for success that we need to use the full range of sound management techniques available to us. **Volunteerism does not eliminate personal accountability.** Thus we need an effective review program because:

- What gets measured gets done.
- Sound leadership and management practices always include a method of measuring and rewarding success.
- No program can be effective unless it is used. Previous evaluation programs were not used uniformly (if at all) for a variety of reasons, and thus were not effective as management tools.

- Improvements can be made with respect to the “positive flavor” of our review program, the level of it’s results orientation, the way we implement it, and the communications process we use to support it.

## **PROCESS**

### **The Goal-Setting Meeting:**

All officers will meet with their appointing official or his/her designee **within 30 days of the anniversary of their appointment date** and establish a series of goals for the upcoming 12 month period. This set of goals is the basis for an annual activity plan. For renewing officers, these interviews will also include a review progress made on goals, and accomplishments for the preceding 12 month period. Newly appointed officers should have their initial goal setting discussion within 30 days of their appointment.

### **The Mid-Year Review Meeting:**

The officers will meet again not more than **6 months from the date of the goal setting** interview to discuss progress being made on the current set of goals and assess what actions should be taken to ensure that each of the goals in the officer’s current activity plan will be achieved. This meeting is also an opportunity to make any necessary adjustments to goals that may have been “overrun by events.” If, as a result of this review, an officer is determined to be at risk of not achieving their goals or receiving a “less-than-fully successful“ Summary Rating for the current period, 30/60 day follow-up interviews will be scheduled in which additional training or assistance can be provided.

### **The Year-End Review Meeting:**

As appointment renewal time approaches the officers will meet to review the goals, achievements and accomplishments for the past 12 months. This meeting can be combined with the discussion in which the goals are set for the upcoming year as described above. Thus, each officer will have a minimum of two goal centered discussions each year, and will receive a Summary Rating recognizing their successes at least each 12 months.

The review cycle is based on the appointment date, or it’s anniversary, for each officer and thus may vary between individuals or be staggered throughout the year depending on appointment dates. This has the added advantage of not burdening a few leaders with perhaps many reviews to do all at one time.

Progress Review meetings should be done in person if at all possible. However, they may be done over the telephone if a face-to-face meeting cannot be scheduled within the 60 day window surrounding the individual’s normal review/appointment date. Progress Reviews can -- and should -- be delegated to Assistants and Senior Officers as needed to

ensure **prompt and meaningful review experiences**, and as training for the Assistant or Senior Officers.

## **CONDUCTING REVIEW DISCUSSIONS**

The following is a SUGGESTED interview format for conducting Progress Review discussions. It is a general recommendation only and should not be used as a script. One size does not fit all with respect to Progress Reviews. The great value in using this goals-based approach is that each goal/activity plan can be tailored to meet the needs of both the individual officer and the specific Members they serve. For additional information on conducting interviews, leaders are encouraged to review Training Bulletin 97-02, "Interviewing Guidelines."

### **Conducting Performance Reviews:**

1. **WHAT:** When communicating with people about performance the following items are important to keep in mind:
  - Does the person know and understand fully what the goal/objective/problem is?
  - Does the person REALLY understand what is expected - what success looks like?
  - Does the other person fully understand what will happen if things do not get done?
  - Do you have all the facts?
2. **WHEN:** If there is a problem, **FIX IT or FORGET IT! Don't delay!** While exceptions may be made if a cooling off period is needed, moving quickly to address performance issues is always the best approach. Recognizing achievement should be done in a timely (and public) manner as well.
3. **WHERE:** **PRIVACY** is always preferable. The review is a personal agreement between an officer and their appointing official or his/her representative. **Performance Review meetings and discussions are private and should be considered confidential.** Choose a neutral location where interruptions and distractions can be minimized, and where both parties can be relaxed and comfortable.
4. **HOW:** Relaxed and informal is usually best, but with a structured approach. Lay out the issues, topics, and problems to be discussed and secure agreement from the person that they have been accurately described and include all the relevant discussion points. This gives you a common framework with which to work.
5. **Tact Vs Honesty:** You can have both by thinking through what you need to say in advance. This allows you to conduct the conversation in such a way that you can **be honest** with the person, but in a tactful, caring way that is not, and will not appear to be a personal attack on them. Do **NOT** allow personal biases to drive the discussion.
6. Allow time for two-way conversation and bi-directional review. This means giving the other person time to respond while you are quiet and listening.

7. Focus on goals set **and results achieved** -- what was accomplished (or not) and why.
8. Interviews are best done in person, but can be done over the telephone if absolutely necessary when a delay would impact the situation in a negative way.
9. Progress Review Interviews can be delegated to an Assistant or Senior Officer, but are ultimately the responsibility of the appointing official.
10. During the interview look for areas of activity where training and/or developmental assignments would be helpful to the person being interviewed.
11. Discuss and document what you need to accomplish and why, as well as how the other person can help you meet your goals.
12. Discuss the other person's goals and objectives and how you can help them succeed.
13. In activities or areas where goals were not achieved or the person falls short of expectations, ask them what they would do differently if they had it to do over. Be prepared with positive suggestions.
14. When setting goals and establishing expectations and standards of performance, be clear. You need to be certain that the other person understands what is expected.
15. Always begin and end the interview on a positive note.

#### Conducting The Goal-Setting Meeting

By definition goals motivate, establish direction, and guide progress. Meaningful goals are the very foundation of the Progress Review Program. For goals to be meaningful they must:

- Be measurable
- Be reachable, but require "stretching"
- Be mutually beneficial
- Be positive and have desirable qualities for both leaders and members
- Be clear and simple -- easy to understand with respect to their intent
- Be written down (on the officer's action plan - Progress Review Form)
- Not be "automatic", conscious effort is required or else they will have no meaning.
- Be appropriate for staff, and beneficial to Members

Not all goals have equal value. In GWRRA goals that have little impact on the Member are not considered in the same light as those that do. For this reason, goals established within the Functional Goal areas will be designated as being either critical or non-critical at the time they are set, and identified as such on the form.

#### Conducting The Mid-Year Review Discussion:

Using the same general procedures outlined above for the goal-setting meeting, officers should meet with their subordinate leaders approximately 6 months after the goal-setting interview was conducted to assess where each is with respect to accomplishing their goals. In this meeting, the focus should be on the goals and what needs to be done. If

most have been achieved, perhaps they should be revised upward or new goals established in their place. If it appears that the officer is struggling to meet the goals, perhaps they should be adjusted downward, or **additional training, support, and/or assistance is needed**. The theme for this meeting should be “what do we need to do to ensure your success in the next 6 months.”

In the case of an officer who is having problems and is in danger of receiving a less than fully successful Summary Rating, special attention and care should be given. It is strongly recommended that a series of follow-up meetings be scheduled for the purpose of providing training or addressing specific problems. While 30 and/or 60 day intervals are recommended, these meetings should be scheduled **as needed** and mutually agreed upon by those involved.

### Conducting The Year-End Review Discussion:

The rating number entered by the reviewer for each of the goal statements should be determined from the perspective of accomplishment and/or result achieved and the impact of achievement or non-achievement from the Member’s point of view. For example, not achieving a minor goal, one having little impact on the Members or officer being reviewed, would not be as serious as falling short on such critical goals as providing regular newsletters, completing/providing opportunities for training, or responding to the needs of the Members. That is why the Functional Goals are designated as either critical or non-critical during the Goal-Setting Meeting.

When the goals are answered with a “0”, it should be viewed as an opportunity to provide additional coaching or training. On the other hand “1 or 2” answers are opportunities for challenging the officer to even greater levels of excellence.

For the purposes of the Progress Review Program, a goal is considered to have been achieved, if in the judgment of the reviewer, the intent and/or objective of that goal has been realized **from the Member’s point of view**.

### ELIGIBLE REVIEWING OFFICIALS

<u>Position/Level</u>	<u>Possible Rating Officials</u>
Chapter	Senior District Director, District Director (or Assistant), Senior Chapter Director
District Assistant),	Senior Region Director, Region Director (or Senior District Director
Regional	Executive Director, Senior National Director, National Director (or Assistant), Senior Region Director
National	Director, Executive Director, Senior National Director

**DEVELOPING/COMPLETING THE PROGRESS REVIEW FORM**

- **Heading Information:** Complete as indicated on the form.
- **Section I - Fundamental Goals:** These goals are standard and need not be adjusted. At the year-end meeting, enter the number (0 or 1 or 2) considered most representative of the level of accomplishment for each goal.
- **Section II - Functional Goals:** The goals already included in each of the goal areas are recommendations only. They may be revised or eliminated as deemed appropriate by those involved in the review. It is recommended that between 3 and 5 goals be set in each area, and that of these not more than 3 be identified as “critical”. The procedure used to document accomplishment in Section 1 should also be used in this Section.
- **Section III - Leadership:** Because the areas of responsibility vary between levels of leadership the goals appropriate for these levels must likewise vary. Therefore only complete paragraph A or B or C as applicable to the level of the officer being reviewed. The same scoring procedures used in Sections I and II are used to complete this section.
- **Section IV - Agreements:** Each of the officers involved in completing the review will sign on the appropriate line as each meeting is conducted. Signatures indicate agreement with the goal statements only, not the Summary Rating.
- **Summary Rating Block:** At the year-end meeting each goal will be scored as described above. A Summary Rating will be assigned as determined from the Table below and the person receiving the rating will be advised accordingly.

SUMMARY RATING	MINIMUM REQUIRED LEVEL OF ACCOMPLISHMENT <i>Expressed In Terms Of Goals Met Or Exceeded - (Scores 1 or 2)</i>		
	Fundamental	Functional/Critical	Functional/Non-Critical
<i>Outstanding *</i>	All	All	All
Superior	All	All	Most
Fully Successful	All	Most	Some
Minimally Successful	Most	Some	Some
<i>Unsuccessful*</i>	Some	None	Some

Outstanding ratings should be assigned based on the **number of goals exceeded** more than the number met, and should be reserved for only the best of the best. Serious consideration for appointment to Senior Officer Status should be given to any officer receiving one Outstanding or two Superior ratings.

## Gold Wing Road Riders Association Progress Review and Activity Plan Form

Activity Plan For: \_\_\_\_\_

Officer Name: \_\_\_\_\_ Position: \_\_\_\_\_

**Review Dates**  
 Goal Setting Interview: \_\_\_\_\_  
 6-Month Progress Review: \_\_\_\_\_  
 30-Day Follow-up Interview: \_\_\_\_\_  
 60-Day Follow-up Interview: \_\_\_\_\_  
 12-Month Review: \_\_\_\_\_

**Summary Rating**  
 \_\_\_ Outstanding \*  
 \_\_\_ Superior  
 \_\_\_ Fully Successful  
 \_\_\_ Minimally Successful  
 \_\_\_ Unsuccessful \*  
*\* Outstanding/ Unsuccessful are used only for exceptional cases based on the judgment of the rating official.*

**Enter 0 = Goal Not Achieved, 1 = Goal Achieved, 2 = Goal Exceeded, Achievement Level**

**I FUNDAMENTAL GOALS:** (To be completed for all officers)

1. Develop and implement a "FUNplan" for the Chapter/District/Region. \_\_\_\_\_
2. Treat Members and colleagues fairly and honestly. \_\_\_\_\_
3. Respond promptly to all requests for information/assistance. \_\_\_\_\_
4. The Chapter/District/Region is active and growing. \_\_\_\_\_
5. Actively support and assist upline/downline officers and staff. \_\_\_\_\_
6. Demonstrate financial responsibility. \_\_\_\_\_
7. Demonstrate concern for the interests GWRRA and it's Members. \_\_\_\_\_
8. Conduct all activities in full harmony with GWRRA operating principles. \_\_\_\_\_
9. Maintain a high level of personal accessibility to the Members. \_\_\_\_\_

**II FUNCTIONAL GOALS (Upline and Local):** (To be completed for all officers)

**A. Member Service**

1. Regular social activities are planned and carried out. \_\_\_\_\_
2. Few Member complaints registered, **all** Member complaints resolved. \_\_\_\_\_
3. Members are aware of all available GWRRA benefits, programs, and services. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**B. Teamwork**

1. Proactively promote LTD, RED, and MED sponsored activities. \_\_\_\_\_
2. Delegate to and involve the full Chapter/District/Region staff. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**C. Communication**

- 1. Reports are accurate and submitted on time. \_\_\_\_\_
- 2. Publish a first-class newsletter at least bi-monthly to all interested parties. \_\_\_\_\_
- 3. Keep upline/downline officers/staff advised of developing issues & successes. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**D. Administration**

- 1. Complete personal training activities and assignments. \_\_\_\_\_
- 2. Provided training and development opportunities for staff and Members. \_\_\_\_\_
- 3. Maintain an adequate staffing level. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**III Leadership**

**A. District Leadership:** (Complete for District and Senior Chapter positions)

- 1. All staff Progress Reviews are completed as scheduled. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**B. Region Leadership:** (Complete for Region and Senior District positions)

- 1. All staff Progress Reviews are completed as scheduled. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**C. National Leadership:** (Complete for National and Senior Regional positions)

- 1. All staff Progress Reviews are completed as scheduled. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**IV Agreements**

We agree that the above goals are realistic, appropriate for our respective areas of responsibility, and representative of our local activity "FUNplans" for the coming year.

Reviewing Officer

Officer

Start of Year: \_\_\_\_\_

6-Month Review: \_\_\_\_\_

12-Month Review: \_\_\_\_\_