



OMA Toolkit

STAR PROGRAM & PEP



Introduction



The STAR Program was developed by your peers at Sandia and it was designed to provide you with useful information and resources which are relevant to your new position. In partnership with the STAR Program the PEP (Partnership Enrichment Program) was created in order to focus on strengthening your partnership with your manager(s). This OMA Toolkit should help facilitate effective communication between you and your management team and assist you with gathering information on how your department runs.

Having a high-impact partnership with your manager(s) and your group will maximize the effectiveness of the team and enable you to be successful at Sandia.

Focus:

- Communicate Expectations
- Beyond your Manager
- Duties
- Successful Partnering
- Performance Criteria
- OMA Excellence
- OMA resources for success

Communicate Expectations



Understanding your role is key. Take the time to sit down with your manager and get a clear understanding of expectations.

- Review your job description
- Inform your manager of any interests you have or anything that you're particularly good at
- Go through the OMA duties list (attached) with your manager(s) and determine what items they would like you to manage or that you have an interest in.
- Communicate your work habits and preferences – find out what your manager's are.
- Find out what the top five things your manager needs most from you.
- How does your manager like to be managed?

| | | |
|-----------------|---------------------|------------------|
| Triage Email | Department Meetings | Phone Coverage |
| Manage Calendar | Delegation | Budget Reporting |

- Establish a standard meeting schedule (daily, weekly or biweekly). Be sure you both commit to making it a priority.

It is important to touch base and take stock in how things are going.
Communicate that to each other.



Communicate Expectations



Working with one or more managers – often times OMAs are asked to support more than one manager. This creates a complexity in establishing priorities. In order to ensure everyone understands their role, it is important to do the following:

- ★ Ensure that you keep regular meetings with assigned managers.
- ★ Review priorities of both managers – make sure they're aware of what each other is asking of you.
- ★ Keep your managers abreast of any projects that are time consuming.
- ★ Report back on status of tasks/projects.
- ★ Ask questions! Are you meeting expectations? Are you providing all of them with the level of support they need?
- ★ Be honest – if you're overwhelmed and need additional support, do not be afraid to ask for it. Talk to your SMA, you have an OMA team within your center that is there to be your support.

Beyond Your Manager



Manager support vs. Department support

- ❑ Get a clear understanding from your manager(s) how you should divide your time.
 - ❑ What things would (s)he like you to do for the staff?
 - ❑ What should they be doing for themselves?
 - ❑ Are there any staff members who may have additional needs or projects that you can assist with?
- ❑ How are timecards handled?

Some typical items that you may help your staff with:

| | | |
|----------------------------|------------------------|-------------------------------|
| Booking Travel | Property | Ordering supplies |
| Mail | Office Moves | Helping with special projects |
| Tracking required training | Logistics for meetings | Expense Reports |

Make sure your manager communicates his/her expectations with the staff.

Beyond Your Manager



Take the initiative and get to know the people you're supporting. Understand where you fit in the big picture. Your group is involved in amazing things – get a feel for what they're up to, it will help you understand the kind of support they'll require.

Get Familiar with your Department

- Review the organizational chart.
- Browse your department's website.
- Find out who does what. Schedule some time with each department member to introduce yourself and find out if they have any special needs.
 - Do they travel a lot? What are their preferences?
 - What is their regular schedule?
 - Do they have any special projects or responsibilities that they may need your help with?
 - Are there any department customs or preferences that you should be aware of?

Get Familiar with your Center

- Know who your senior management team is (Sr. Managers & Directors).
- Go to All Hands meetings.
- Read up on your Center's website.
- If there are seminars or brown-bag lunch opportunities – try to attend.

OMA Duties



Every OMA/Manager partnership is unique. There is a baseline level of support that is expected but depending upon your expertise and your manager's needs, you may be supporting your manager in a different way than some of your peers support their managers. Below are the Core Competencies that build the baseline support you should be providing:

| Work Approach & Professional Etiquette | Office Management | Corporate Knowledge & Values | Computer Skills |
|---|---|--|---|
| <ul style="list-style-type: none">• Approachable & Customer Oriented• Mentoring, Sharing Best Practices & Supporting Peers• Dependable• Flexible & Adaptable• Interpersonal Conflict Resolution, Style Adaptability & Teamwork• Maintain Confidentiality• Listening & Phone Etiquette• Professional Oral & Written Communication | <ul style="list-style-type: none">• Proactive Approach to Meeting & Anticipating Business Needs• Logistics for incoming and outgoing staff & visitors• Travel Coordination• Meeting Planning & Coordination• Prioritization, Multi-tasking & Time Management• Sandia Protocol for Internal & External Interactions | <ul style="list-style-type: none">• Sandia Culture & Values• Lifelong Learning & Continuous Improvement• General Knowledge of SNL Business Strategies and Objectives | <ul style="list-style-type: none">• Intermediate Knowledge of MS Excel and Internet Explorer• Sandia Reporting Systems• Advanced Knowledge of MS Word, PowerPoint & Outlook |

OMA Duties



| Daily | Weekly | Monthly | Annually | As Needed | | |
|--|--|--|---|---|--|--|
| Calendar Management | Travel arrangements for manager and staff (Foreign and Domestic) | Purchasing (office supplies, books, equipment) | Preparation for interns | Building Space Issues | Coordinate meetings (schedule and logistics) | Set up for new employees (computer, space and etc) |
| Maintain conference rooms (including scheduling) | Monitor timecards | Property coordination | Property Inventory | Team Celebrations (anniversaries & retirements) | Interview Candidates | Exit paperwork and follow up |
| Answer phone | Monitor required training for department (TEDS) | Equipment reapplication | Tracking year-end spending | CCHD requests | Visitors – (schedule, logistic, badging, seminars) | Requisitions |
| Give status updates | Reportville report | Expense Vouchers | Keep track of subscriptions and memberships | Assist with project budgets | Submitting FNRs | Office moves |
| Read and prioritize email | | Maintain office equipment | Building-wide clean up day | Serve as BETL | Outgoing classified visits | Publications Lists |
| Maintain a filing system | | Keep up department org chart | Coordinate an annual off site conference | Review and Approvals | No Fee Agreements | Coordinate PMF meetings with manager and staff |
| Print manager's calendar daily | | Monthly surveillance of LESA App | SSO Audit *Classified | Webcars Requests | Telecom requests | Facilities requests |
| Monitoring VTRs *Classified | Maintain Files *Classified | | Internal Self Assessments *Classified | Create and maintain SharePoint sites | FNR Requests | Procard purchasing |

Successful Partnering



Building a Partnership

Establish Trust

Get to know your manager.
Be dependable and accountable.
Stretch yourself.

Collaborate

Understand what your group is involved in.
Become a resource.

Successful Partnership

Effective Communication

Don't assume. Communicate what you are doing.
Make sure your manager understands any obstacles.

Agree on Expectations

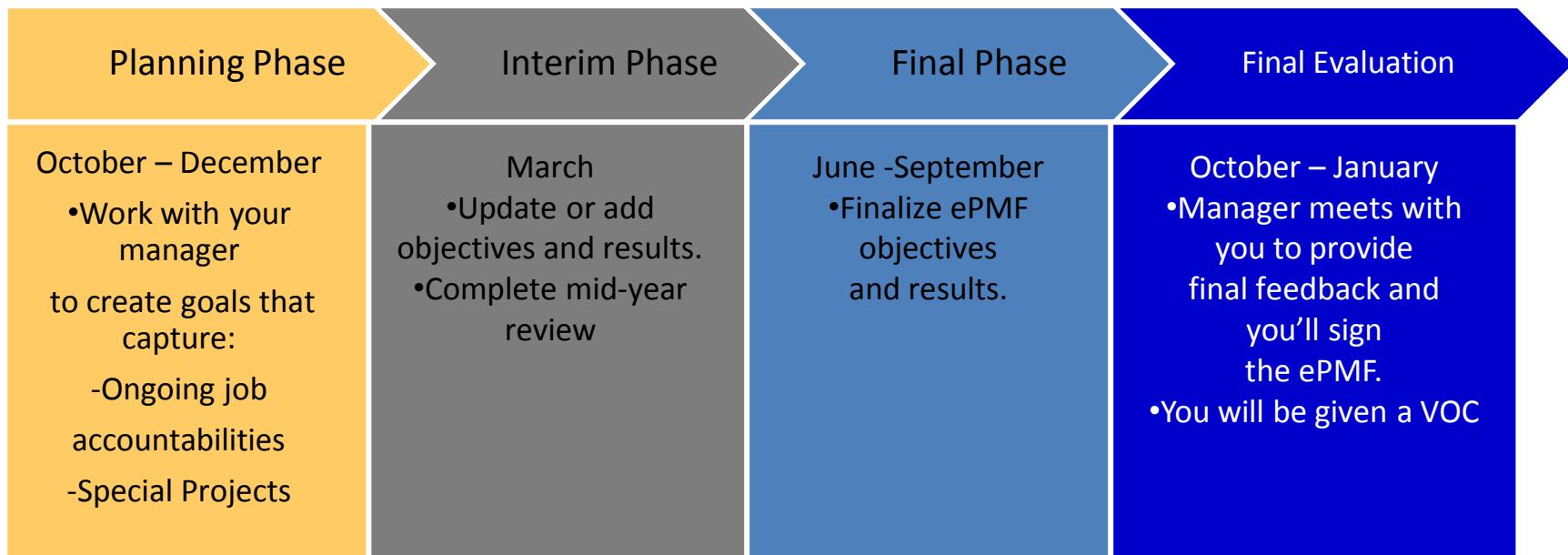
Check for understanding.
Ensure that you understand your role and what is expected of you.
Follow up to ensure that you're meeting expectations.

Performance



Understanding performance criteria and how performance is measured at Sandia should help you succeed at Sandia. The performance management and review process is designed to encourage, recognize and reward employee contributions.

- ❑ Every non-represented employee will need to complete an ePMF. An ePMF is an Electronic Performance Management Form.



Performance



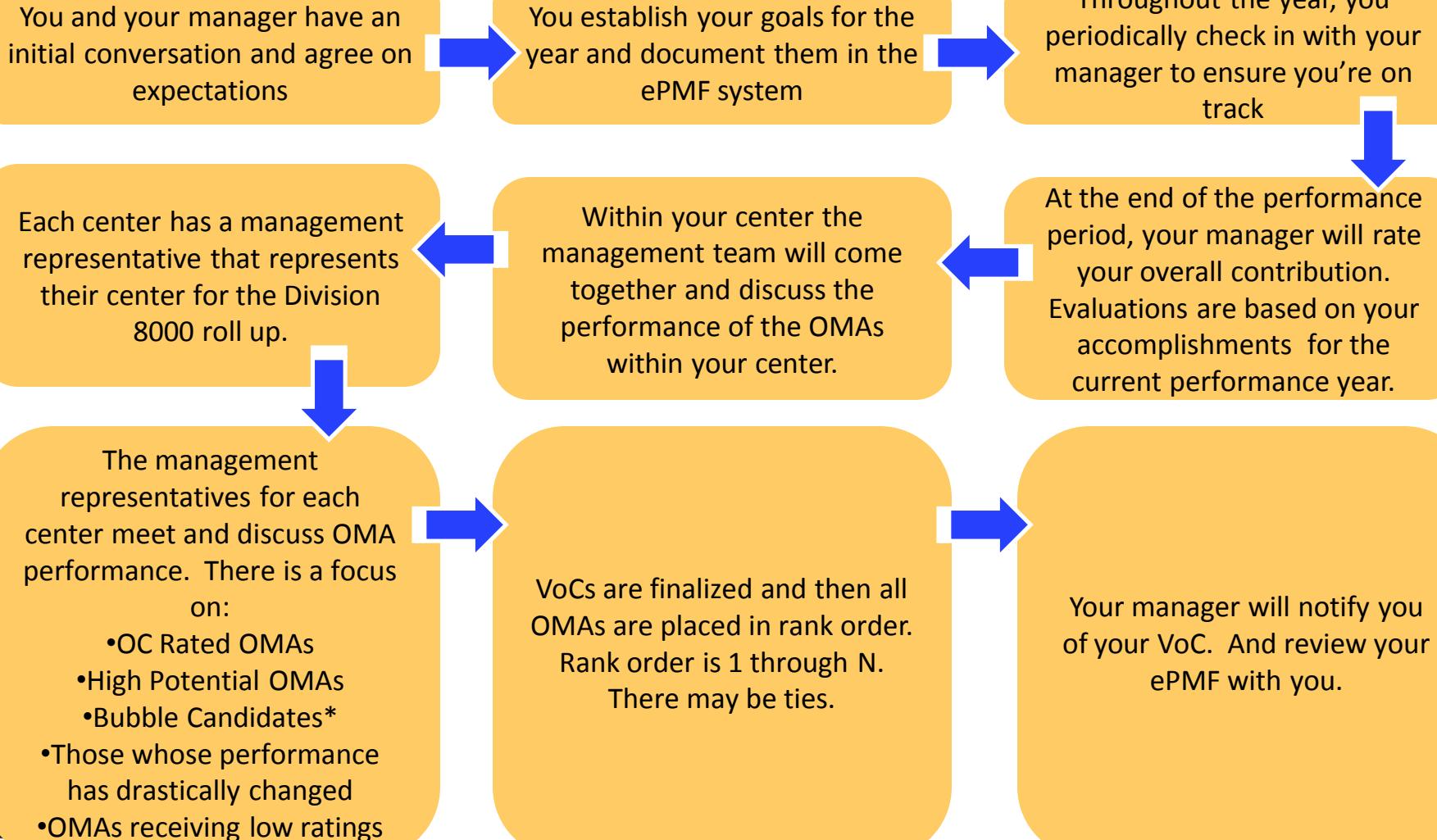
At the Final Evaluation Phase of the ePMF process your manager will designate a rating for you. The rating is used to describe the overall value of your contribution. Below are the VoCs (Value of Contribution).

| | | |
|---------------------------------------|--|-------------------|
| Outstanding Contributor (OC) | The employee has consistently performed far beyond expectations achieving consistently superior results and modeling constructive attributes for success. This designator recognizes contributions that are clearly distinguishable from and superior to the rest of the population. <small>*There is a corporate cap of no more than 25% OCs</small> | GRAND SLAM |
| Full Contributor High (FC-H) | The employee consistently demonstrated a willingness to go the extra mile and generally exceeded the established objectives and expectations through performance as a "can-do" self-starter who continually seeks ways to improve and support their team. | HOMERUN |
| Full Contributor Medium (FC-M) | The employee's contribution was full, complete, and satisfactory. It was at the level expected from a fully qualified and experienced person in the assigned position. This designator indicates no serious deficiency in any major element of the job. | |
| Full Contributor Low (FC-L) | The employee's contributions were generally satisfactory. However, contributions were not at the level expected from a fully qualified and experienced person in the assigned position and there were shortfalls in the results and/or attributes employed while completing assigned roles and responsibilities. Sustained performance at this level will likely result in movement to Not Fully Contributing. | |
| Not Fully Contributing (NC) | Performance clearly falls short of expectations in quality and/or quantity, results, and attributes in performing work. Requires excessive supervision. Might show skill or behavioral deficiencies that could have negative impact on results. To maintain the current job classification, this rating requires the establishment of a written performance improvement plan resulting in near-term and sustained improvement. | |
| Not Rated (NR) | Used for employees for whom performance has been observed for less than six months due to new hire status or intermittent or continuous Company approved absence (excluding military leave), or sickness. Managers with employees on military leave greater than six months should contact their HRC or Compensation for assistance. | |

Performance



Your performance...how does it all come together?



Performance



The philosophy within Division 8000 has been that OMAs are a site resource. So, having an impact on the site and thinking about how you can be a resource for Sandia, as a whole, is important.

Get involved at the site level – but be sure your management team is aware

| | | |
|---------------------------------------|-------------------------|---------------------|
| Take Our Daughters & Sons to Work Day | Holiday Spirit Campaign | Food Drive |
| STAR Training Team | Site Celebrations | Mentoring new OMAs |
| Sharing Best Practices | BETL | SHARE Campaign |
| APC | Back up other OMAs | Cover the SMAs desk |

This is a very limited list of all the things that are happening around the site.

OMA Excellence



OMA Excellence Performance Criteria

| Office Management | VoC= OC (outstanding Contribution) | VoC = FC (full contribution) | VoC = NFC (not fully contributing) |
|--|---|---|--|
| <ul style="list-style-type: none"> • Proactive approach to meeting and anticipating business needs. • Prioritization, multi-tasking, and time management. | <ul style="list-style-type: none"> • Consistently provides insight to the manager. • Serves as a “thermometer” for the organization by keeping the manager informed of key staff and customer issues. • Exercises independence in setting up and following through on tasks, including documentation • Is proactive in anticipating department needs. | <ul style="list-style-type: none"> • Plans, responds, prioritizes, and handles multiple tasks. | <ul style="list-style-type: none"> • Requires excessive guidance to accomplish individual tasks. • Does not have basic skills or understanding to complete routine, well-documented tasks. |
| <ul style="list-style-type: none"> • Logistics for incoming and outgoing staff and visitors. • Travel coordination. • Meeting planning and coordination. • Sandia protocol for internal and external interactions. | <ul style="list-style-type: none"> • Exhibits exemplary office management skills. • Understands the content and context for the department. • “Runs” the department in the manager’s absence | <ul style="list-style-type: none"> • Completes projects accurately. • Performs and takes security responsibility appropriately in each situation. | <ul style="list-style-type: none"> • Does not perform appropriate security responsibilities |

| Corporate Knowledge and Values | VoC= OC (outstanding Contribution) | VoC = FC (full contribution) | VoC = NFC (not fully contributing) |
|---|---|---|---|
| <ul style="list-style-type: none"> • Sandia culture and values. • Lifelong learning and continuous improvement. • General knowledge of SNL business strategies and objectives. | <ul style="list-style-type: none"> • Perspective is larger than one’s department. • Actively seeks out and engages in service contributions at the site level. • Considered a key partner in accomplishing organization goals and objectives. • Embraces learning and growth. | <ul style="list-style-type: none"> • Has sufficient knowledge of how to get tasks done. • Identifies appropriate contacts and knows where to find information and materials. • Is a resource for Sandia systems such as timecards, T-logs, and other administrative systems. | <ul style="list-style-type: none"> • Does not initiate the appropriate self study to understand administrative issues. |

OMA Excellence



| Computer Skills | VoC= OC (outstanding Contribution) | VoC= FC (full contribution) | VoC = NFC (not fully contributing) |
|--|--|---|--|
| <ul style="list-style-type: none"> Intermediate knowledge of MS Excel and Internet Explorer. Knowledge of Sandia reporting systems. Advanced knowledge of MS Word, PowerPoint, and Outlook. | <ul style="list-style-type: none"> Extremely competent in many computer programs. Sought out for expertise in various computer programs. | <ul style="list-style-type: none"> Possesses computer competency in “core” programs (MS Word, PowerPoint, Excel, Outlook) Creates documents and knows how to use tables, basic animation, style elements, graphs, and equations. | |
| Work Approach and Professional Etiquette | | | |
| <ul style="list-style-type: none"> Approachable and Customer Oriented | <ul style="list-style-type: none"> Consistently exceeds customer expectations. Through own initiative, is able to identify and solve problems using independent judgment. Actions have a positive outcome and impact on the organization. | <ul style="list-style-type: none"> Is approachable and is sought out for help. Stays on top of issues; doesn’t drop the ball. Meets customer expectations and has good relationships with all levels of management and external customers and contacts. Recognizes when initiative needs to be taken and can anticipate beyond the immediate issue. | <ul style="list-style-type: none"> Does not perform essential job function of being available for work. (attendance and being present in work area) |
| <ul style="list-style-type: none"> Acts as a mentor, shares best practices, and supports peers. | <ul style="list-style-type: none"> Is considered a key resource for all administrative processes. Considered a mentor or natural leader of OMAs. Ability and willingness to substitute for the Center SMA. Takes risks, initiates improvements, and offers creative ideas. | <ul style="list-style-type: none"> Works independently, with minimal supervision. Takes some risks; is a self starter. | |
| <ul style="list-style-type: none"> Dependable, flexible & Adaptable | <ul style="list-style-type: none"> Services are sought out beyond the work group. Extremely reliable, communicates projects status | | |

Resources



There are always opportunities and resources available.

TRAINING OPPORTUNITIES:

- **Software Training Course** (including Microsoft Word, Excel, PowerPoint, Outlook, SharePoint, charting, Access)
- **Interpersonal Training Course** (including Social Styles, 7 Habits of Highly Effective people)
- **Other** (Financial, effective time management and etc)

[TEDS Training](#)

NETWORKING:

- **Administrative Professionals Council (APC)**
- **Toastmasters**
- **Diversity and Outreach Groups**
- **Programs offered through HBE**

JOB SPECIFIC RESOURCES:

- **STAR Training**
- **Your SMA and center OMAs**

Summary



Creating a high-impact partnership with your manager is a continuing process. It will build slowly over time. The result is that your partnership will continue to grow and so will the success of you and your manager.

