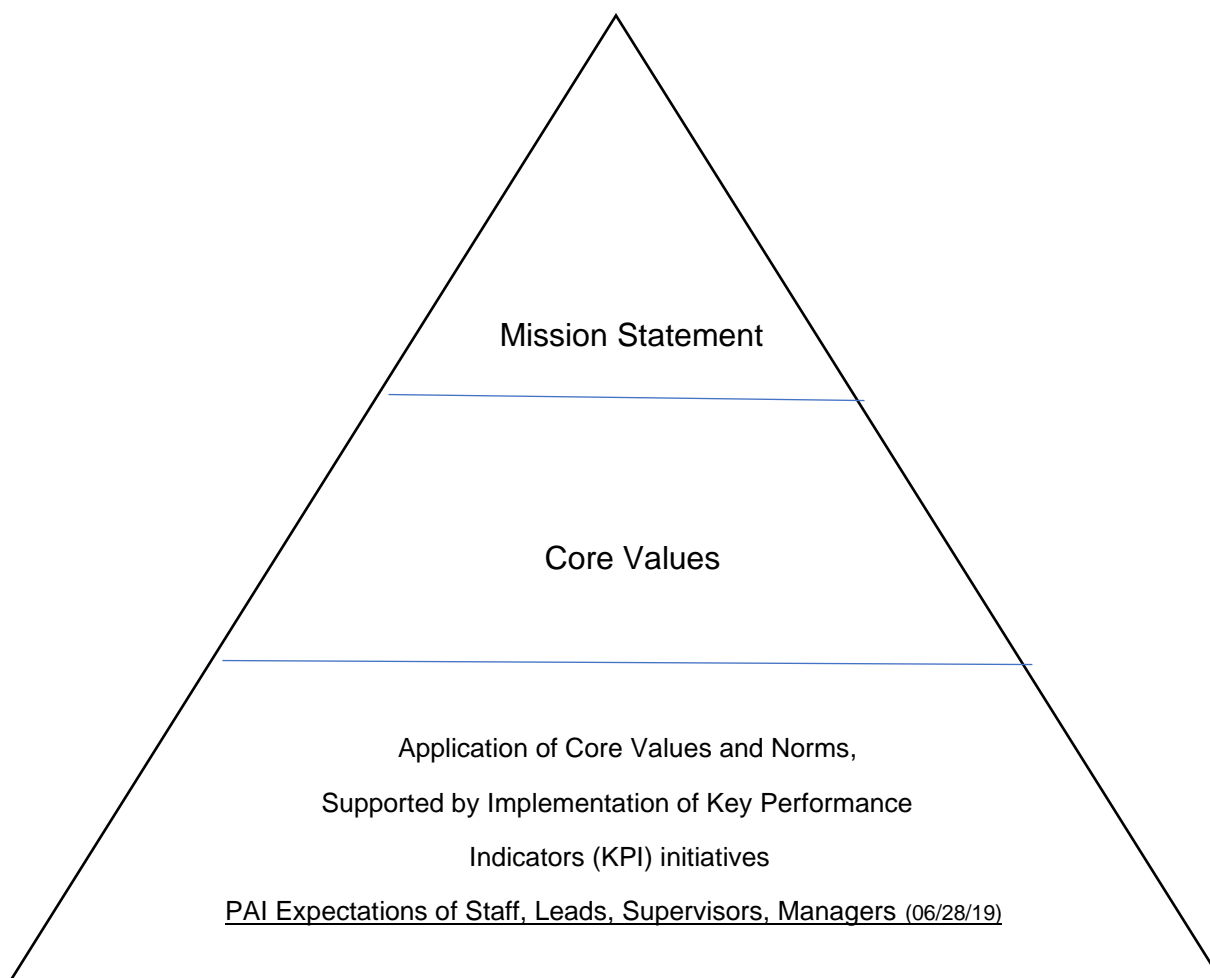


Pacific Administrators, Inc. (PAI) Relationship Pyramid (April 30, 2018, Updated June 30, 2019)



PAI Mission Statement

Kulia I Ka Nu`u – Strive for the Highest – “We Comply With Your Benefit Success” (USP = Universal Selling Proposition)

To be the industry leader in quality service to our valued customers by providing the best service with positive attitudes, working together as a team to attain goals, to solve problems, and to learn and grow.

PAI Core Values, Norms and KPIs Together Support the Achievement of the Mission Statement

“We are a humble team of equals who have positive attitudes, treat everyone with respect/fairness, work together, have a strong ‘work ethic’ and do whatever it takes to provide excellent customer service.
We nurture our staff by openly communicating, listening, coaching and by setting the example.”

- 1) **Walk the Talk** - **Lead** by example, listen, coach, train; always with respect.
- 2) **Attitude of Gratitude** – **Value** our employees, clients and service providers.
- 3) **Do What It Takes** – We are all **accountable**, relied upon and appreciated.
- 4) **Kulia I Ka Nu`u** – **Service excellence** to our clients, our participants, service providers and one another.
- 5) **Same Canoe** – Our Helmsman steers our canoe and guides us forward. As a **team**, we are all: “paddling together” in sync, positive, considerate and communicative with one another.

PAI Key Performance Indicators (KPIs)

- 1) **KPI #1 – Human Resource Management – Employee Attraction, Retention, Development**
– Focus: 1) Succession Planning – Cross-training, desk manuals
- 2) **KPI # 2 – Profitability – Revenue Growth Must Exceed Expenses to Fund Operations, Future**
- 3) **KPI #3 – Client Retention – Maintain Existing Clients, Prepare for Growth**
- Leading Edge Software, Equipment - Claims, Administration, Content Management/Document Retention
- 4) **KPI # 4 – Compliance – Regulations, Reporting, Policy**
- Focuses: 1) Record Retention; 2) Access Information Management – Refining processes

PAI Norms - Standards that we operate by, holding each other accountable (Core Value #)

- 1) Support PAI's Core Values, Key Performance Indicators (KPIs) and Norms. (4)
- 2) Be a positive compliance example for others: PAI's Employee Handbook, Office Policies. (3)
- 3) Seek to understand your purpose, communicate by asking questions when unsure, plan and schedule your approach to complete tasks accurately and timely to meet deadlines. (3)
- 4) Treat each other with respect (positive, cheerful support reflects well on all concerned). (1)
- 5) Keep others informed and communicate clearly and timely to promote understanding. (5)
- 6) Take notes, build on desk reference manual (continuous cross-training); strive to improve work processes within department and as related to coordination between departments. (4)
- 7) Be a lifelong learner (and teacher, coach and/or leader) depending on the situation. (4)
- 8) Think and work as a team as the workplace is not a competition; we are all on the same canoe. (5)
- 9) Model flexible thinking and be open-minded to change (and other approaches) to enhance work efficiency and effectiveness. (4)
- 10) Maximize your well-being by striving for balance between work and play, taking time to keep your mind, body and spirit healthy. (4)
- 11) Maintain an overall positive attitude to promote a productive and pleasant work environment. (2)
- 12) Be proactive, not reactive – Plan for worst case outcome, strive for the best. (3)
- 13) Put yourself in the other person's shoes by listening more, then understanding and showing respect, even if you disagree. (1)
- 14) Communicate tactfully, ensure sending/receiving of messages (email, voice mail, conversations, letters, etc.); tact is making your point concisely without making an enemy. (5)
- 15) Be PAI – “P” = Positive thinker, “A” = Always kind, “I” = Inspire others; with Honesty and Integrity. (5)

**PAI Expectations of Staff, Leads, and Especially Supervisors, Managers
Supporting PAI Mission Statement, Core Values, Norms, and KPIs (June 28, 2019)**

- 1) Maximize service level to ensure department coverage (Even more important with Flex Schedule) Policy
 - a. Email your supervisor to approve when you submit leave request in DayForce
 1. Set **personal** Outlook "Out of Office Assistant" (with start and end date/time)
 2. **PAI Outlook** – Notate Meetings out of office, even if only "tentative" (notate so until finalized, then update)
 - b. PAI Intranet – Supervisor to post
 1. Out of office – For Supervisor/Manager and staff – List date (and time slots if less than whole day)
 - c. When you will be out of office – Whether in advance or that day
 1. Call, text and/or email your supervisor who will email to notify HR, switchboard, department who will not be at work desk (per published work shift / lunch hour schedule) – And update PAI Intranet
 - d. Communications
 1. Email – Confirm that you received so sender knows (completes the "send/receive" loop)
 - a. Check Inbox regularly by sorting by subject to respond to latest email, reviewing string
 2. Telephone/in person communication – Follow up afterward with email to confirm what you discussed
 3. In person – Start discussion by prefacing subject, "Regarding _____ ..."
 - e. Problem-Solving - When presenting a problem/matter, be prepared and present
 1. Cause/facts
 2. Possible solutions, recommended solution
 3. Which makes it easier for listener to evaluate, respond with agreement or alternate suggestions

- 2) Expectations of Supervisors, Managers (from review form) and of Leads and Staff (Who play key roles)
– Regular text from 2018 Performance review form; *italics are for added text*
 - a. Supervision
 1. Assigns work to maximize group strengths.
 2. Involves employees in the identification and solution of work-related problems.
 3. Promotes teamwork and cooperation.
 4. *Timely* exercises discipline and resolves conflict fairly, constructively and consistently.
 5. Exhibits a positive "can do" attitude and readily "rolls sleeves up" to pitch in to complete tasks.
 6. Promotes harmony within and between departments.
 - b. Development of staff
 1. Individual exhibits positive role-model examples of professionalism.
 2. Facilitates the increase in knowledge and skill of subordinates with training and coaching, preparing them for promotability and /or expansion of present duties.
 3. Provides positive direction to subordinates, keeps them informed, and upholds policies and procedures.
 4. Keeps subordinates appraised of their performance, is sensitive to their problems and facilitates their learning.
 5. Leads by positive example in appearance, action, words, punctuality (breaks, attendance), properly exemplifies *PAI Expectations (Model Expected Behavior)*.

6. *Develops “right” / “left hands”, to form a “Wide and deep bench” – Succession Planning – Coaches staff capitalizing on strengths, improving weaknesses.*
7. *Treat others how one wants to be treated – “Platinum Rule” (Surpasses “Golden Rule”).*
8. *Effectively trains and mentors staff. Coaches to develop staff, via setting goals (supporting department/company goals) and steps to achieve them, to fulfilling potential in position.*
9. *Gives clear directions, written and/or verbal, and implements “double check systems” so work produced is timely, complete, and accurate.*
10. *Available - To provide timely, candid responses, both praise and constructive suggestions, to guide staff regarding work and performance.*
11. *Approachable – Be respectful, civil, thoughtful, empathetic, receptive to staff feedback (Practice MBWA – “Management By Walking Around” – Make time to do so).*

c. Production Control/Customer Service

1. Monitors the accomplishment of goals, targets; uses performance standards in providing evaluation and feedback.
2. Plans for and allocates resources to meet objectives.
3. Schedules, organizes and monitors effort.
4. Solves work-flow problems and develops new methods.
5. Strives for balance in production, quality and (excellent customer, i.e., member) service.
6. *Prioritizes work, assesses staffing resources and completes tasks and/or requests in a timely manner, obtains management approval or direction to move forward.*
7. *Constantly seek process improve to help department and company performance; discusses, communicates (with people/departments involved) before making changes – Gap Analysis.*
8. *Prepared for and timely attend all internal and client meetings; regularly meets with/informs staff to provide updates for awareness and action.*
9. *Effectively builds professional relationships with clients, fellow service providers and employers.*
10. *Successfully completes client requests in a timely manner and provides status updates or confirmation when a request is complete.*
11. *Establishes ability to anticipate client requests and timely meet their needs.*

d. Judgement/Professionalism

1. The extent to which decision making and conduct are sound and consistent with company objectives, policies and procedures.
2. Obtains and evaluates pertinent information to determine source of and alternative solutions to problems.
3. Constantly exhibits the proper company image with respect to appearance and conduct in relation to co-workers, clients, members.

e. Self-Development/Communication Skills

1. Individual maintains a high degree of professionalism in job function through continued training and development, professional association with subordinates and co-workers.
2. Continues to grow in skill and knowledge as reflected by contributions on the job. Keeps management informed.
3. Fosters communication within and between departments.
4. *Timely addresses and notifies others (that need to know) of significant or urgent matters*
5. *Emotional Intelligence/Self-Awareness Development – Cultivating Respect (See next section)*

f. Due Dates

1. Acknowledge deadlines and schedule work to complete on time; otherwise obtain approval. (e.g., timesheet approvals, interim & annual reviews, annual/quarterly goals updates, assignments, and client meeting reports, etc.).

g. Compliance

1. Compliant with employee handbook, other company and department policies
2. Supports PAI Core Values, Key Performance Indicators (KPIs), Norms, *and Expectations*

h. Initiative/Teamwork

1. Takes action without being told, without need for detailed instruction. A "self-starter" who finds better ways to accomplish responsibilities/ goals.
2. Employee is capable of coping independently with unusual situations and problems.
3. A "team player" within and between departments.
4. Puts in necessary time and effort to "get the job done".

3) Cultivating Respect (Matters) – Self-Reflection Questionnaire (For reference, reflection, implementation)

- a. *Do you consider how your words and actions will impact others before you speak (or write)?*
- b. *Do you avoid applying biases or stereotypes to coworkers that may impact your ability to work together?*
- c. *Do you encourage team members to share different opinions?*
- d. *Do you promote a positive work environment by avoiding gossip, complaining, or other negative behavior at work?*
- e. *Do you use a constructive and solution-driven approach to resolving work conflicts?*
- f. *Do you treat all employees, regardless of level or seniority with respect?*
- g. *Do you think before you impulsively react to situations, without making negative assumptions about others?*
- h. *Do you monitor how respectful your words, tone, and body language are when interacting with coworkers, member, service providers, trustees, employers, etc.?*
- i. *Do you know your "hot buttons" so that you can manage your reactions to conflict in a more respectful manner?*
- j. *Do you consider the professional needs of others and the workplace when making work decisions?*