

PERFORMANCE PLANNING WORKSHEET

Employee _____

Date 10/4/2005 _____

Job Title Administrative Assistant _____

Unit _____

Step 1: Determine Critical Job Functions

What is provided through this position (administrative support, technical assistance, customer service, supervision, custodial services, project management, etc)? Please list all major job functions.

1. Oversee the course and faculty schedule process including scheduling courses according to identified needs and faculty preferences, reserving classrooms and entering all necessary data into Banner.
2. Provide administrative support to department, including department chair and 20 faculty members, including preparing and duplicating documents, databases and reports, and conducting research.
3. Provide customer service to students, parents, staff and visitors of the department including answering phones, responding to inquiries and providing accurate information.
4. Assist with day-to-day administration of the department budget including entering, approving and monitoring expenditures.
5. Schedule and coordinate department meetings and events to include sending invitations, reserving rooms, ordering necessary items and taking minutes.
6. Supervise work study students to include hiring, training, scheduling and evaluating of work study students.

Step 2: Identify Primary Tasks and Standards of Performance

List the most important tasks of this job. (Attach additional sheets if needed.) For each task, determine standards of performance based on one or more of the following criteria. A performance standard generally answers important questions about the impact of the job.

- ▶ **Quality** How well the task must be performed?
 - ▶ **Quantity** How much needs to be done?
 - ▶ **Timeliness** How fast or by what deadline the task needs to be done?
 - ▶ **Cost** Under what cost or budget constraints the task must be done?
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TASK#1 Oversee the course and faculty scheduling process including scheduling courses according to identified needs and faculty preferences, reserving classrooms and entering all necessary data into Banner.

Standard (defines “Fully Satisfactory” Work): All scheduling and corresponding entry should be completely accurately and in accordance with University policies and procedures and the timelines established by Academic Affairs.

Example of “Commendable” Work: Meeting the standards of “fully satisfactory” an in addition, organizing the work and milestones so the task is complete ahead of the identified deadline and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” an in addition, identifying time-consuming aspects of the process and creating a streamlined process that reduces the time spent on this task by 30% each semester and consistently performing at this level.

TASK#2 Provide administrative support to department, including department chair and 20 faculty members, including preparing and duplicating documents, databases and reports, and conducting research.

Standard (defines “Fully Satisfactory” Work): Documents, database and reports should be presented in a professional manner, grammatically correct, clear and logical with accurate information. Work should be completed according to deadline established by faculty members, and working with appropriate faculty member and/or chair to resolve any conflicting deadlines.

Example of “Commendable” Work: Meeting the standards of “full satisfactory” and in addition, improving the end product to make it more professional or user-friendly and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” and in addition, anticipating the needs of the chair and faculty members, and taking the initiative to provide solutions before being asked for them and consistently performing at this level.

TASK #3 Provide customer service to students, parents, staff and visitors of the department including answering phones, responding to inquiries and providing accurate information.

Standard (defines “Fully Satisfactory” Work): Accurate information should be provided to all customers consistently in a friendly, helpful and professional manner. All questions and inquiries should be responded to within 24 hours and all phone calls should be answered by a person (not voicemail) during posted office hours.

Example of “Commendable” Work: Meeting the standards of “fully satisfactory” and in addition, recommend and implement ideas to create a more welcoming environment for students, parents, staff and visitors, i.e. re-organizing the front office to provide additional seating or finding a way to organize forms so visitors can easily locate them and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” and in addition, review, modify and update the web site to provide more information online to

improve the service provided to customers based on feedback and the most common questions received in the department and consistently performing at this level.

TASK #4 Assist with day-to-day administration of the department budget including entering, approving and monitoring expenditures.

Standard (defines “Fully Satisfactory” Work): Expenditures should be entered and approved accurately within 24 hours of receipt. Accurate budget reports should be provided to the department chair on the 1st of each month and immediate notification of the department chair should occur when expenses exceed available budget.

Example of “Commendable” Work: Meeting the standards of “fully satisfactory” and in addition, implement a process to streamline the process of ordering supplies and reducing the time spent on this process and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” and in addition, researching different vendors, in accordance with university policies and procedures, to recommend cost-saving options for supplies and consistently performing at this level.

TASK #5 Schedule and coordinate department meetings and events to include sending invitations, reserving rooms, ordering necessary items (such as food and equipment) and taking minutes.

Standard (defines “Fully Satisfactory” Work): Invitations and meeting notices should be sent out two weeks prior to the meeting and include accurate information regarding the details of the meeting, such as location, agenda, etc. All reservations for rooms and necessary items should be ordered to ensure timely delivery of items. All relevant expenses should be within identified budget, with exceptions approved by the department chair.

Example of “Commendable” Work: Meeting the standards of “fully satisfactory” and in addition, implementing a process to reduce time spent on sending invitations and tracking responses and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” and in addition, implementing a process to reduce time spent on sending invitations and tracking responses and reducing the budget of the event by 25% while maintaining the same level of service to the attendees and consistently performing at this level.

TASK #6 Supervise work study students to include hiring, training, scheduling and evaluating of work study students.

Standard (defines “Fully Satisfactory” Work): University policies and procedures should be followed when hiring and evaluating work study students. Work study students should be trained to provide quality, professional customer service and respond to the most common questions and inquiries. Work schedules for students should be created to ensure that customers can talk to a live person during posted office hours.

Example of “Commendable” Work: Meeting the standards of “fully satisfactory” and in addition, creating a training manual for student employees as a resource for the students to better serve the customers and implementing a process to provide feedback to the students on a regular basis and consistently performing at this level.

Example of “Distinguished” Work: Meeting the standards of “fully satisfactory” and in addition, coordinating a schedule for yourself and the student workers that would still meet the customer service standard of always having a live person during office hours, while reducing the student budget by 25% and consistently performing at this level.