

PERFORMANCE PLANNING WORKSHEET

Employee _____

Date 10/4/2005 _____

Job Title Manager _____

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. Supervise department staff in accordance with university policies and procedures, including hiring and training new employees; assessing employee performance; addressing poor performance; and developing employees.
2. Oversee daily operations of the department/area, including identifying, implementing and evaluating work processes and service standards.
3. Research, recommend, implement and evaluate department policies and procedures to meet the needs of the university and customers.
4. Manage department initiatives.
5. Manage department budget, including preparing and monitoring the budget; approving expenses and making appropriate reallocations.

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?

TASK#1 Supervise department staff, including hiring and training new employees; assessing employee performance; addressing poor performance; and developing employees.

Standard (defines “Fully Satisfactory” Work): Supervise staff in accordance with university policies and procedures. Conduct searches in a timely, effective manner in alignment with the university’s strategic goal of increasing workforce diversity. Assess employee performance and address poor performance in a timely manner and in a respectful and consistent way.

Example of “Commendable” or “Distinguished” Work (depending on the degree to which fully satisfactory is exceeded): Meeting the standards of “fully satisfactory” and in addition, establishing a process for hiring that increases the effectiveness of the hiring

process whether it is through the effective use of university resources or implementing processes to help the university achieve its goal in workforce diversity. Meeting with employees frequently to assess their performance and provide feedback, as well as identify areas for development, and consistently performing at this level.

TASK#2 Oversee daily operations of the department/area, including identifying, implementing and evaluating work processes and service standards.

Standard (defines “Fully Satisfactory” Work): Establish work standards, including but not limited to customer service, response time and quality, and effectively communicate the standards to the department staff. Research, implement and evaluate identified work processes within established timelines to ensure the needs of the department, university and customer are met and to ensure the most effective use of university and department resources.

Example of “Commendable” or “Distinguished” Work (depending on the degree to which fully satisfactory is exceeded): Meeting the standards of “fully satisfactory” and in addition, create a process by which department staff members can become actively involved in the process – by building excitement, and trust, establishing a process for receiving feedback and ideas and by gaining buy-in to the new process, as well as the established work standards and processes, and consistently performing at this level.

TASK #3 Research, recommend, implement and evaluate department policies and procedures to meet the needs of the university and customers.

Standard (defines “Fully Satisfactory” Work): Conduct thorough research into policies and procedures, recommend policies and procedures to meet university and department needs, gather appropriate feedback and make any necessary changes, follow all necessary approval processes, implement policies and procedures within the established timeframe and budget. Continue to review and evaluate policies and procedures on an ongoing basis to ensure the needs of the university and department are being met and that university resources are being effectively utilized. This should be completed for each identified policy and procedure.

Example of “Commendable” or “Distinguished” Work (depending on the degree to which fully satisfactory is exceeded): Meeting the standards of “fully satisfactory” and in addition, implement policies and procedures that result in a reduction in utilization of university resources, whether human or financial, significantly and conduct an analysis (such as creating a survey for customers) to identify additional policies and procedures to be reviewed to provide better customer service or better utilization of university resources, and consistently performing at this level.

TASK #4 Manage department initiatives and projects.

Standard (defines “Fully Satisfactory” Work): Establish timeline and budget for the initiative, identify tasks and milestones, delegate tasks to other responsible parties and follow up to ensure completion of assigned tasks, prepare any necessary reports or communication, complete initiative within established timeframe and budget, and ensure initiative is completed to the defined standards.

Example of “Commendable” or “Distinguished” Work (depending on the degree to which fully satisfactory is exceeded): Meeting the standards of “fully satisfactory” and in addition, implementing a new process to reduce the resources, whether human or financial, significantly, and consistently performing at this level.

TASK #5 Manage department budget, including preparing and monitoring the budget; approving expenses and making appropriate reallocations.

Standard (defines “Fully Satisfactory” Work): Manage budget in accordance with university policies, guidelines and procedures to effectively utilize the University’s financial resources. Prepare and distribute reports and proposals that are accurate, professional, high quality and within the established timeline.

Example of “Commendable” or “Distinguished” Work (depending on the degree to which fully satisfactory is exceeded): Meeting the standards of “fully satisfactory” and in addition, implement processes to more effectively manage the use of the department budget (i.e. implement a bi-weekly process to review and justify the use of overtime in the department or implement a process for better management of supplies to reduce utilization), and consistently performing at this level.