

PERFORMANCE PLANNING WORKSHEET

Employee _____ Date _____

Job Title _____ 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.
- 2.
- 3.
- 4.
- 5.

Who is served by this position (students, faculty, staff, parents, vendors, public agencies, etc.)?

- 1.
- 2.
- 3.
- 4.
- 5.

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?

EXAMPLES:

Task: Resolve student complaints

Standard(s) associated with this task:

- Quality: Uses good customer service techniques
- Timeliness: Resolves complaints within 24 hours after receiving them

TASK#1 _____

Standard(s) associated with this task:

Quality? _____

Quantity? _____

Timeliness? _____

Cost? _____

TASK #2 _____

Quality? _____

Quantity? _____

Timeliness? _____

Cost? _____

TASK #3 _____

Quality? _____

Quantity? _____

Timeliness? _____

Cost? _____

Please repeat this process until you have listed and established performance standards for all critical job functions of the employee's job.