

Performance Planning Worksheet

Employee: _____

Date: _____

Job Title: _____

Step 1: Determine Critical Job Functions

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

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

Step 2: Identify Key Tasks and Standards of Performance

List the most important tasks of this job. (Attach additional sheets, if needed.) For each task, determine standard(s) of performance based on one or more of the following criteria:

- ◆ **Quality** How well the task must be done
- ◆ **Quantity** How much needs to be done
- ◆ **Timeliness** How fast or by what deadline the task needs to be done
- ◆ **Cost** Under what cost constraints the task must be done

Example:

Task: Resolves student complaints

Standard(s) associated with this task:

- ◆ **Quality:** Uses good customer service techniques
- ◆ **Timeliness:** Resolves complaints within 24 hours

Task: _____

Standard(s) associated with this task:

Quality? _____

Quantity? _____

Timeliness? _____

Cost? _____

Task: _____

Standard(s) associated with this task:

Quality? _____

Quantity? _____

Timeliness? _____

Cost? _____

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