

Ten Steps for Performance Planning

- 1] Performance plans should be completed timely so that they are not addressing as future issues events that have already occurred.
- 2] The performance plan should be the product of a joint process that is shared equally by the supervisor and the employee in question.
- 3] The initial portions should address the "boiler plate" issues that are agency requirements for all employees. Examples may address the hours of work, dress requirements, and other things that your personnel office requires.
- 4] Identify specific, measurable components of the job that are required of any incumbent.
- 5] Identify as tasks the acquisition of any skills, training, or education that will enhance the employee's function. This is an opportunity to support the employee in acquiring enhanced value by granting administrative leave or investigating reduced tuition plans.
- 6] Unless the plan is corrective, dealing with a troubled employee, discuss including a "sandbox" goal in the plan. This entails assigning or delegating an area of activity that the employee finds enjoyable and interesting. It offers the opportunity for periodic changes of pace and function and helps motivates employees on the job.
- 7] Include any other reasonable function that the employee feels important unless it violates agency policy or creates too great a workload.
- 8] Negotiate with the employee the mechanisms and factors that will be used in measuring their performance.
- 9] Review the plan at least quarterly with the employee. The review tells the employee that you think that (s)he and the plan are important enough to spend the time. It also will provide for early detection and notification of problems and reinforces your credibility should problems develop later.
- 10] No performance plan is written in stone. As long as there is mutual agreement, adjustments can be made to reflect events as they unfold.

The plan must be in writing and must be signed by both the supervisor and the employee.