Samford University

Writing Performance Expectations

Performance expectations are the basis for appraising employee performance. Written performance expectations let you compare the employee's performance with mutually understood expectations and provide more accurate performance appraisals.

Having them in writing may be a new concept because expectations existed whether or not they were discussed or put in writing. When you observe an employee's performance, you usually make a judgment about whether that performance is acceptable. How do you decide what is acceptable and what is not acceptable performance? That answer to that question is the first step in establishing written performance expectations.

Performance expectations establish a baseline for measuring performance. They are not to be written as ideals but as what is generally acceptable. From performance expectations, supervisors can provide specific feedback describing the gap between expected and actual performance.

Performance Expectations:

- Help employees understand responsibilities
- Provide objective measures against which performance results are assessed
- Provide clear strategic direction for the next appraisal cycle
- Set foundation of effective performance management
- Enhance staff productivity
- Support organizational goals
- Go beyond the job description
- Describe the condition that must exist before the performance can be rated "Expected"

How to write performance expectations:

- Start with the job description
- Think of statements of performance expectations that describe how you know the employee is doing a good job. These should be expressed in terms of quantity, quality, time, cost, effect, manner of performance, method of doing
- Write performance expectations that are measurable or observable
- Write performance expectations for each key area of responsibility on the job description, not necessarily every task
- Seek assistance for actions/behaviors that are not easy to express in performance expectations
- Be sure to include supervisory expectations if the employee is a supervisor and compliance expectations if compliance is a responsibility
- Employees may/should have input into the performance expectations to ensure accuracy but the final edit must be completed by the supervisor
- Write performance expectations that you can measure or observe and that do not create a bureaucracy (to monitor/measure/record)

Terms for expressing performance expectations:

- Quantity: specifies how much work must be completed within a certain period of time, e.g., sets up 30 files per day

- Quality: describes how well the work must be accomplished. Specifies accuracy, precision, appearance, or effectiveness, e.g., 95% of documents submitted are accepted without revision
- Timeliness: answers the questions, By When?, How Soon?, or Within what period?, e.g., all work orders completed within 2 workings days of receipt
- Effective Use of Resources: used when performance can be assessed in terms of utilization of resources: money saved, waste reduced, etc., e.g. the student handbook project will be completed using only internal resources
- Effects of Effort: addresses the ultimate effect to be obtained; expands statements of effectiveness by using phrases such as: so that; in order to; or, as shown by, e.g., establish inventory levels for storeroom so that supplies are maintained 100% of the time
- Manner of Performance: describes conditions in which an individual's personal behavior has an effect on performance, e.g., assists other employees in the work unit in accomplishing assignments
- Method of Performing Assignments: describes requirements; used when only the officially-prescribed policy, procedure, or rule for accomplishing the work is acceptable, e.g. 100A Forms are completed in accordance with established office procedures

Job duties versus performance expectations:

- Job duties define what a person does
- Performance expectations define how the job duties are performed when performed in a satisfactory manner
- Performance expectations focus on end results, the how, not the what.

Examples of Performance Expectations

Following is how you might derive performance expectations from the job description. The "A" statement is the statement from the job description. The "B" statement is the" A" statement re-written as a performance expectation. (You would not write A and B statements in the Performance Expectations, this is just an illustration):

- A. Provide telephone coverage in coordination with the Executive Secretary for the President's Office.

- *B. Is flexible and responsible in coordinating phone coverage such that there is not a lapse in phone coverage.*

- A. Maintain and organize the President's calendar

- *B. Maintains and organizes the President's calendar so that it is accurate, up-to date and no conflicts or drops arise.*

- A. Greets visitors, handles questions and assists in any way.

- *B. Consistently handles visitors to the President's Office in a friendly, courteous and professional manner.*

- A. Maintain office supplies including "hospitality items."

- *B. Maintains an adequate inventory of all office and hospitality supplies within budget limits such that supplies do not run out and there is not excessive inventory.*

- A. Handle routine business matters with other departments (may include expense and budget items sent to the President for approval or with outside vendors and any similar office activities).

- *B. Works cordially and cooperatively with other departments ensuring confidentiality, security and expedited handling of paperwork.*

- A. Maintain various lists (general office telephone and address list, and names and addresses for Christmas cards).

- *B. Maintain required lists so that they are accurate, up to date and available when needed.*

- A. Process mail for the President and office personnel. This also includes organizing email messages and any hand-delivered correspondence or packages.

- *B. Processes mail so that it is consistently delivered in an accurate and prompt manner.*

- A. Maintain filing system in coordination with office personnel.

- *B. Maintains filing system so that materials are filed accurately, timely and in accordance with standard office procedures.*

- A. Transcribe dictation and prepare letters for the President's signature. Copy, mail and file correspondence as necessary.

- *B. Transcription is completed and managed in a timely and accurate manner with the correspondence being routinely dispatched as expected.*

- A. Perform miscellaneous office duties as assigned by the President

- *B. All other duties as assigned are completed with a cheerful attitude and in a professional manner with the desired outcome*

Employee Name:

Job Title: Administrative Assistant

Department: President's Office

Rating Period:

Performance Expectations:

- Is flexible and responsible in coordinating phone coverage such that there is not a lapse in phone coverage.

- Maintains and organizes the President's calendar so that it is accurate, up-to date and no conflicts or drops arise.

- Consistently handles visitors to the President's Office in a friendly, courteous and professional manner.

- Maintains an adequate inventory of all office and hospitality supplies within budget limits such that supplies do not run out and there is not excessive inventory.

- Works cordially and cooperatively with other departments ensuring confidentiality, security and expedited handling of paperwork.

- Maintain required lists so that they are accurate, up to date and available when needed.

- Processes mail so that it is consistently delivered in an accurate and prompt manner.

- Maintains filing system so that materials are filed accurately, timely and in accordance with standard office procedures.

- Transcription is completed and managed in a timely and accurate manner with the correspondence being routinely dispatched as expected.

- All other duties as assigned are completed with a cheerful attitude and in a professional manner with the desired outcome