

Performance Planning Checklist - *Being Clear on Expectations*



1. Align job expectations with overall strategic plans, department goals, and position description

- Be sure that organizational goals, mission and values are clear.
- Review individual job descriptions for needed updates (minimally every three years).
- Be sure the employee understands how their role relates to the organizational goals.

2. Establish and agree upon performance expectations and work priorities

- Be clear with all staff what the expectations and priorities for the year are for their work.
- If you supervise staff that require individual goals, employees should be involved in this conversation to create their goals.
- In a timely manner, finalize goals with the employee and what success looks like. (required for PSU/MTA Unit A)
- Reach a verbal agreement or make a plan to deal with any differences still needing to be addressed.

3. Clarify what the employee will be evaluated on

- Be up front and clear about your expectations.
- Be clear about how goals and or work priorities are weighted –what is most important.
- Share the evaluation form, if new employee and be up front about how you think about the ratings.

4. Identify sources for feedback on the employee's performance

- Clarify how you will be collecting information about the employee's performance (in writing, observation, verbally, etc.).
- Identify any “organizational” sources of feedback (customer service evaluations, surveys).
- Ask the employee if there are other appropriate sources to include.

5. Set the stage for feedback, documentation, and coaching throughout the year

- Ask the employee about preferences for receiving feedback.
- Be clear what documentation you expect the employee to keep and what you will keep.
- Clarify any specific information that you need the employee to track or be responsible for.
- Identify a plan for regular check-ins on performance, goals and/or work priorities.
- Ask employee about what recognition is meaningful for them.

6. Clarify next steps and responsibilities

- Ensure that both employee and supervisor have copies of finalized goal plans if used, (the supervisor may not be the one to do it but is the person responsible for being sure it is done).
- Identify when your next meeting or check-in will happen.
- Allow time for questions and clarifications.
- Follow all processes and procedures for employees you supervise.