COMMONWEALTH OF PENNSYLVANIA

Employee Performance Standards Planning Form

Employee Supervisor

Job Title Agency/Organization

EPR Cycle Begin Date EPR Cycle End Date

|  |  |  |  |
| --- | --- | --- | --- |
| **%** | **Priority** | **Key Activity or Responsibility** | **Performance Standard** |
| 1. Job Knowledge | | | |
| % |  | A. |  |
| % |  | B. |  |
| % |  | C. |  |
| 2. Work Results | | | |
| % |  | D. |  |
| % |  | E. |  |
| % |  | F. |  |
| % |  | G. |  |
| 3. Communications | | | |
| % |  | H. |  |
| % |  | I. |  |
| 4. Initiative/Problem Solving | | | |
| % |  | J. |  |
| % |  | K. |  |
| 5. Interpersonal Relations/Equal Employment Opportunity (EEO) | | | |
| % |  | L. |  |
| % |  | M. |  |
| 6. Work Habits | | | |
| % |  | N. |  |
| % |  | O. |  |
| 7. Supervision/Management (required for all supervisors/managers) | | | |
| % |  | P. |  |
| % |  | Q. |  |

Employee Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Supervisor Signature \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Instructions for Employee Performance Standards Planning Form

The Performance Standards Planning Form is initiated by supervisors to establish performance standards at the beginning of the Employee Performance Review (EPR) cycle. The intent is to translate the organization’s strategic goals (or business plans) into performance standards to be accomplished by the employee. Supervisors are advised to consult with employees to set challenging performance standards that the employee is committed to achieving. It is best if the supervisor does not simply impose goals on employees.

To complete the Performance Standards Planning Form:

Step 1. Fill out the heading information, including employee and supervisor names, job and agency data, and the beginning and ending dates of the EPR cycle.

Step 2. Determine the primary tasks to be accomplished by the employee in support of the organization’s strategic goals. List tasks in the “Key Activity or Responsibility” column, sorted by category (Job Knowledge, Work Results, etc.). List no more than one task per line. Unused lines should be marked “N/A.”

Step 3. For each task, identify how the task will be measured, and the acceptable level of performance. List this information in the “Performance Standard” column.

Step 4. For each task, identify the approximate percentage of the employee’s time that will be spent on the task. List this information in the “%” column.

Step 5. For each task, the relative priority of the task. Highest priority will be 1, next highest priority will be 2, etc. List this information in the “Priority” column.

Example

|  |  |  |  |
| --- | --- | --- | --- |
| % | Priority | Key Activity or Responsibility | Performance Standard |
| 25% | 2 | A. Resolve customer service inquiries | within 48 hours of receipt |
| 5% | 5 | B. Prepare weekly progress report | with no more than 2 errors |

Step 6. Discuss the performance standards with the employee. Have the employee sign and date the document.

Step 7. Sign and date the document. Make a copy for your files, and give the original to the employee.