

Date:10/30/2000
Revised:10/17/2000

PERFORMANCE PLANNING WORKSHEET

PERSONNEL ONLY			
JOB CHANGE_	HIRE_		
DATE	/		
WTS CKD	/	BY	_____
WTS ENT	/	BY	_____
CHG CKD	/	BY	_____
CHG ENT	/	BY	_____

EMPLOYEE:
NAME _____
CODE: 560035 TITLE: SPEC, COMPENSATION
SSN _____
DEPT _____

SIGNATURE _____ DATE _____

SUPERVISOR:
NAME _____ SSN _____

SIGNATURE _____ DATE _____

This form is used to communicate the performance expectations for the individual employee. It is to be prepared at the beginning of the appraisal period. A new appraisal period begins whenever the employee is assigned to a new position, the supervisor for the employee changes, the position is reclassified, or at the beginning of a new annual review period. The plan is discussed by the supervisor and employee, indicated by both signatures on the form. When completed, this form serves as the Individual Performance Plan and will be used for future reviews.

JOB SUMMARY:

SERVES AS A MEMBER OF THE COMPENSATION AND CLASSIFICATION GROUP IN THE UNIVERSITY PERSONNEL OFFICE. PERFORMS JOB ANALYSIS AND JOB EVALUATIONS AND RECOMMENDS RELATIVE PAY GRADES/LEVELS. EDITS AND RECOMMENDS CHANGES IN JOB DESCRIPTIONS AND PERFORMANCE APPRAISAL PLANS. EDITS, CORRECTS AND APPROVES SOURCE DOCUMENTS FOR UPDATE TO THE COMPENSATION SYSTEM DATA BASE PROVIDES GUIDANCE, INTERPRETATION, AND TRAINING TO OTHERS IN COMPENSATION MATTERS. OPERATES COMPUTER EQUIPMENT FOR DATA INPUT, STORAGE, AND RETRIEVAL AND TO GENERATE SPECIAL REPORTS. CONDUCTS QUALITY ASSURANCE CHECKS TO INSURE DATA BASE INTEGRITY. MAINTAINS MANUAL FILES OF SUPPORTING DOCUMENTATION, REPORTS, AND CORRESPONDENCE. COORDINATES/MANAGES SPECIAL PROJECTS. PREPARES SPECIAL REPORTS.

KEY RESPONSIBILITIES PERFORMED BY ALL:

Responsibility Number: 1 % Weight: _____

PERFORMS JOB ANALYSES TO DETERMINE AND QUANTIFY DUTIES, RESPONSIBILITIES AND RELATIONSHIPS OF SPECIFIC JOBS. EVALUATES JOBS USING COMPUTER MODEL POINT-FACTOR SYSTEMS, PEER JOB COMPARISONS, EXTERNAL LABOR MARKET SURVEY DATA, AND SUCH. RECOMMENDS GRADE LEVELS/PAY RATES ASSIGNMENTS. CONDUCT ON-SITE JOB AUDITS BY COMPARING WORK PERFORMED WITH WORK DESCRIBED/CREDITED AND RECOMMENDS CHANGES. FOLLOWS STANDARD AU POLICIES AND PROCEDURES AND GENERALLY ACCEPTED PRACTICES/PRINCIPLES FOR JOB CLASSIFICATION/EVALUATION.

Performance Standards:

- a. Conducts thorough job analyses, taking into account all applicable factors.
- b. Completes paperwork and audits within an acceptable timeframe.
- c. Conducts all interactions in a professional and courteous manner.

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY ALL:

Responsibility Number: 2 % Weight: _____

ORIGINATES, EDITS, CORRECTS/REJECTS AND/OR APPROVES FOR INPUT, SOURCE DOCUMENTS FOR DATA CHANGES, DELETIONS, OR ADDITIONS TO THE FILES/RECORDS/CATALOGS/TABLES IN THE DEDICATED COMPUTERIZED COMPENSATION SYSTEM AND TO ASSURE THE DATA BASE IS ACCURATE AND CURRENT. CONTROLS TH INPUT PROCESS.

Performance Standards:

- a.Maintains up-to-date information in database.
- b.Ensures accuracy of information in database.
- c.Allows no information to be input into the system without proper authorization.

Responsibility Number: 3 % Weight: _____

CONDUCTS QUALITY ASSURANCE CHECKS TO ASSURE THE INTEGRITY OF THE DATA BA BY RETRIEVING FROM THE DATA BASE SAMPLE DATA OR REPORTS AND COMPARING TO SOURCE DOCUMENTS AND OTHER REPORTS/DATA ELEMENTS. RECORDS RESULTS, MAKE REPORTS OF QA CHECKS, AND RECOMMENDS CHANGES IN PROCEDURES/PROGRAMS AS NECESSARY TO MEET GIVEN QA GOALS.

Performance Standards:

- a.Ensures information contained in the database is accurate, detecting a deleting any erroneous information.
- b.Completes QA checks/reports according to established time tables.
- c.Implements changes in procedures/programs upon appropriate approval, giving thorough consideration to all possible ramifications of said changes.

Responsibility Number: 4 % Weight: _____

OPERATES DESK-TOP COMPUTER EQUIPMENT FOR DATA INPUT, STORAGE, MANIPULATION, AND RETRIEVAL IN A DEDICATED COMPENSATION/CLASSIFICATION SYSTEM. REFERS TO WRITTEN GUIDELINES AND PROGRAM MENUS.

Performance Standards:

- a.Maintains knowledge of the capabilities of current computer software

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY ALL:

programs and is proficient in using applications.

- b.Ensures information is easily retrievable and provided upon request within a reasonable timeframe.

Responsibility Number: 5

% Weight: _____

MAINTAINS MANUAL REFERENCE FILES FOR WRITTEN FORMS, CORRESPONDENCE, AND OTHER WORKING PAPERS RELATED TO JOB ANALYSIS, JOB CLASSIFICATION/EVALUATION, AND POSITION MANAGEMENT.

Performance Standards:

- a.Maintains files in an orderly, well-organized filing system.
- b.Ensures information in files is complete, accurate, and up-to-date.
- c.Ensures information in files is easily retrievable and provided to others upon request within reasonable timeframe.

Responsibility Number: 6

% Weight: _____

PREPARES SPECIAL REPORTS FROM THE DEDICATED COMPUTER SYSTEM DATA BASE BY SELECTING PARAMETERS AND OPERATING THE EQUIPMENT WHILE REFERRING TO SYST DOCUMENTATION AND PROGRAM MENUS. ANALYZES AND PRESENTS REPORTS AS REQUIRED.

Performance Standards:

- a.Prepare quality reports upon request and within established timeframe
- b.Ensures requested parameter of report(s) is(are) maintained.
- c.Presents reports as requested/required in a professional and courteous manner.

Responsibility Number: 7

% Weight: _____

COORDINATES EMPLOYEE PERFORMANCE APPRAISAL PROGRAM. RECOMMENDS SCHEDULE AND PROCEDURES. COORDINATES PREPARATION AND INPUT OF INDIVIDUAL APPRAIS PLANS AND GENERATION OF REPORT DOCUMENTS; AND MONITORS REPORTING, EDITS/APPROVES INPUTS OF REPORTS TO DATA BASE. MAINTAINS MANUAL REFEREN FILES OF PAPER REPORTS, PLANS, AND CORRESPONDENCE FOR THE PROGRAM.

Performance Standards:

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY ALL:

- a.Performs employee appraisal documents procedures expeditiously.
- b.Ensures no erroneous information is entered into system. Information entered only upon proper authority.
- c.Provides requested reports in a timely manner.
- d.Maintains reference files accurately and completely.

Responsibility Number: 8 % Weight: _____

PARTICIPATES IN A LABOR MARKET SURVEY PROGRAM BY CONTACTING SOURCES, NEGOTIATING WITH PROVIDERS, PREPARING QUESTIONNAIRES, TAILORING INCOMING DATA TO LOCAL USE, AND MAKING/COORDINATING INPUT TO THE DATA BASE. COORDINATES WITH RECEIVERS, RETRIEVES DATA FROM DATA BASE AND PREPARES REPORTS FOR DISTRIBUTIONS. MAINTAINS MANUAL REFERENCE FILES OF REPORTS. RECEIVES GENERAL GUIDANCE AND POLICIES.

Performance Standards:

- a.Solicits meaningful market information from peer groups (both industrial and collegial).
- b.Requests from outside sources are completed by deadlines.
- c.Transfers information accurately into database.
- d.Generates reports as requested in a timely manner.
- e.Conducts all interactions in a professional and courteous manner.

Responsibility Number: 9 % Weight: _____

GIVES GUIDANCE/ADVISE AND FORMAL TRAINING PLUS INTERPRETS POLICY FOR SUPERVISORS/EMPLOYEES FOR AU COMPENSATION POLICIES, PROCEDURES, AND PLAN ON AN INDIVIDUAL OR GROUP BASIS.

Performance Standards:

- a.Specialists are well-versed in policies pertaining to compensation.
- b.Requests for information are answered in a timely manner.
- c.Conducts all interactions in a professional and courteous manner.

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY ALL:

Responsibility Number: 10 % Weight: _____

MANAGES/COORDINATES SPECIAL PROJECTS BY DRAFTING TASK PLANS/SCHEDULES, DRAFTING PROCEDURES/GUIDELINES AND PREPARING CORRESPONDENCE, MONITORING PROGRESS AND REPORTING.

Performance Standards:

- a.Establishes procedures which will result in achieving goals of special projects.
 - b.Completes special projects according to scheduled timeframe.
 - c.Reports are accurate and timely.
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Responsibility Number: 11 % Weight: _____

KEEPS RECORDS AND MAKES SCHEDULED REPORTS OF DAILY BUSINESS TO REFLECT PRODUCTION, BACKLOGS, AND TRENDS. PREPARES PERIODIC REPORTS AND RECONCILES OPEN TASKS WITH CUSTOMER OFFICES.

Performance Standards:

- a.Records and reports are timely and accurate.
 - b.Prepare well-organized files that are easily retrievable.
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Responsibility Number: 12 % Weight: _____

CONDUCTS ANALYSES/STUDIES WHEN ASSIGNED AND MAKES RECOMMENDATIONS FOR IMPROVEMENTS IN POLICIES, PROCEDURES, AND SYSTEMS RELATED TO COMPENSATION CLASSIFICATION AND APPRAISAL MATTERS.

Performance Standards:

- a.Completes special assignments by assigned deadlines.
- b.Presents recommendations that are sound and based upon a thorough investigation of all related factors.

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY ALL:

Responsibility Number: 13 % Weight: _____

SUPERVISES PART TIME STUDENT EMPLOYEES BY ASSIGNING AND REVIEWING WORK, GIVING INSTRUCTION, AND COUNSELING IN MATTERS REGARDING AU POLICIES, RUL AND OPTIONS OPEN TO THE STUDENT WORKER.

Performance Standards:

- a.Treats student employees professionally.
- b.Ensures intern students receive a thorough education on the workings o a Personnel department, focusing on Compensation and Classification issues.
- c.Assigns work to be performed; reviews for accuracy.

KEY RESPONSIBILITIES PERFORMED BY SOME:

Responsibility Number: 14 % Weight: _____

CONTRIBUTES TO THE UNIT'S PROGRAMS, GOALS AND OBJECTIVES RELATED TO ECONOMY, QUALITY, CUSTOMER SATISFACTION, AND/OR IMAGE THROUGH TEAMWORK, COOPERATION, SUGGESTIONS AND PERSONAL PRODUCTIVITY AND CONDUCT.

Performance Standards:

- a.Positive feedback from customers/constituents about employee's performance is frequent while negative feedback is rare.
- b.Frequently demonstrates sound, independent judgement to deal with unusual cases not specifically covered in standing guidelines.
- c.Frequently makes independent, constructive suggestions for improving policies, procedures and systems for the workplace.
- d.Record of completion of available training courses directly related to job responsibilities reflect a reasonable effort to improve job knowledge, skills, and abilities.
- e.Readily accepts responsibilities for special projects and/or team efforts and carries through to completion whenever there is an opportunity to do so.
- f.Demeanor, speech, and personal relations with team members, customers and constituents contribute to harmony and reflect a good image for th unit.

EMPLOYEE NAME: _____ SSN: _____

KEY RESPONSIBILITIES PERFORMED BY SOME:

g..

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h..

Performs other responsibilities as assigned by supervisor.