

# PERFORMANCE EVALUATION FORM WORKBOOK

## PURPOSE OF THE WORKBOOK

This workbook is designed to provide instruction in:

1. Writing *results-oriented* job responsibility statements
2. Developing *measurable* and consistent work standards

## WRITING OR REVISING *RESULTS-ORIENTED* JOB RESPONSIBILITY STATEMENTS

**Definition:** A results-oriented format makes clear why work is important. In addition to stating job duties, as most job descriptions do, a results-oriented job description also explains the purpose of the work and what is accomplished by performing the duty.

### EXAMPLES

<b>These are results:</b>		<b>These are duties:</b>
Fills vacant positions	by	recruiting through newspaper ads and placement agencies, and interviewing and testing candidates.
Provides secretarial services	by	typing correspondence, procedures, interoffice memos, and announcements.
Produces in-house newsletter	by	soliciting, gathering, editing, and arranging articles.
Monitors benefits program	by	acting as liaison between users and providers and reviewing and updating records, bills, and employee lists.
Anticipates cash flow related to material purchases	by	projecting purchase order commitments.
Develops and maintains a competent, productive, and satisfied staff	by	supervising, directly and through delegation, all personnel; supervisory responsibilities include hiring, disciplining, counseling, coaching, appraising performance, and terminating, as well as providing educational and experiential growth opportunities and maintaining morale.
Creates and completes orders	by	producing records on GALIN
Outlines procedures for the unit	by	developing and maintaining a procedural manual.
Assist patrons in the use of GALIN (the Libraries' on-line catalog and processing system) and in answering patron questions related to both the location of specific material and general library operations	by	participating in staffing the department's information desk.

Maintains flexibility and awareness of changes in the department and organization and contributes to the team effort	by	assuming other similar duties and responsibilities as assigned.
Maintains inventory	by	projecting production requirements, analyzing discounts, and tracking materials used.
Ensures material availability	by	approving payment of processors and authorizing movement of materials
Determines sources of materials	by	placing special materials inquiries with domestic mills and international brokers.

(Source: Performance Management, getting results from your performance planning and appraisal system, by Roger J. Plachy, page 75.)

A job-result statement involves three elements:

- ⇒ An action verb (see list)
- ⇒ What the action described by the verb produces
- ⇒ How the action is performed

### **List of action verbs describing job actions**

<b><i>Controls</i></b>	ensures	<b><i>Teaches</i></b>	finds	
acts	executes	guides	furnishes	
acts for	expedites	instructs	issues	<b><i>Recommend</i></b>
administers	follows up	trains	itemizes	advises
adopts	implements		lays out	apprises
anticipates	initiates	<b><i>Records</i></b>	lists	consults
approves	keeps	amends	locates	contributes
arranges	maintains	arranges	merges	counsels
assigns	manages	attaches	notes	interprets
assumes	obtains	charts	outlines	promotes
authorizes	orders	circulates	places	proposes
cancels	oversees	codes	posts	submits
closes	releases	composes	prepares	suggests
conducts	represents	consolidates	processes	
contracts	requires	copies	receives	<b><i>Contacts</i></b>
coordinates	routes	deletes	registers	attends
corrects	schedules	describes	renders	calls
decides	secures	disseminates	summarizes	collaborates
delegates	selects	distributes	tabulates	conducts
determines	signs	drafts	traces	confers
directs	supervises	enters	transfers	consults
employs		files	writes	cooperates

corresponds	compiles	classifies	scans	<b><i>Operates</i></b>
discusses	computes	edits	screens	aligns
facilitates	disburses	indexes	searches	assembles
informs	evaluates	proofreads	surveys	batches
interviews	extends	rates	tests	carries
notifies	figures	revises		centers
participates	inventories	verifies	<b><i>Designs</i></b>	clears
refers	invoices		creates	collates
requests	measures	<b><i>Studies</i></b>	defines	disassembles
requisitions	pays	analyzes	develops	feeds
visits	reconciles	ascertains	establishes	handles
	remits	audits	formulates	opens
<b><i>Counts</i></b>	sells	estimates	institutes	processes
adds	totals	examines	organizes	sorts
appraises		inspects	originates	stacks
balances	<b><i>Compares</i></b>	investigates	plans	types
bills	affirms	observes	prepares	
calculates	catalogues	reviews	selects	
collects	checks	samples		

(Source: Performance Management, getting results from your performance planning and appraisal system, by Roger J. Plachy, page 84.)

Selecting the verb that most accurately describes the action is one of the major concerns when writing a results-oriented responsibility statement. Words such as “ensure,” “make sure,” “assure,” or “provide” can often be deleted. Modifiers such as “good,” “efficiently,” “accurately,” “properly,” and “timely,” which are intended to remind employees how well something must be done, are unnecessary, since they are commonly implied or are better stated as a work standard. For example:

<b>Change this ...</b>	<b>To this ...</b>
Processes payroll and taxes by ...	Pays wages and remits taxes by...
Ensures payment by ...	Obtains payment by ...
Keeps customers informed by ...	Informs customers by ...
Ensures accuracy of data by making sure that each manifest is balanced and that product codes agree with customer’s order	Verifies data by balancing manifests and correlating product codes with customer order.
Ensures that customers are billed accurately by entering appropriate information in the system	Inputs billing data by operating computer terminal.

## Examples of task-oriented responsibilities written as results-oriented responsibilities

**Task-oriented:** Acts as receptionist for the Administrative Offices.

**Results-oriented:** Provides information and direction by greeting staff, patrons, or guests in person or by multi-line telephone and providing information pertaining to organizational procedures and policies and/or routing them to the appropriate personnel.

**Task-oriented:** Prepares correspondence, paperwork, surveys, reports, etc. and maintain all filing for the Administrative Offices.

**Results-oriented:** Provides clerical and administrative support for the office and for other departments in the Libraries by preparing correspondence, paperwork, surveys, reports, etc. and for maintaining all filing for the Administrative Offices

**Task-oriented:** Makes on campus deliveries as requested.

**Results-oriented:** Maintains efficient communication of information to on-campus departments by making daily deliveries to on-campus departments.

**Task-oriented:** Orders supplies for Administrative Offices.

**Results-oriented:** Maintains Administrative Offices supply cabinets by frequent review of needs and processing orders for needed or requested items.

**Task-oriented:** Serves as liaison between Human Resources and the Libraries for matters concerning faculty, staff and student assistants as appropriate.

**Results-oriented:** Interprets departmental and university personnel and budget policies and procedures to Libraries staff by serving as liaison with appropriate university departments (Human Resources, Business Services, etc.) and maintaining awareness of changes.

**Task-oriented:** Assists in the formulation of library personnel policies and in interpretation of University policies, particularly those related to classified staff.

**Results-oriented:** Participates in the formulation of Libraries personnel policies by maintaining awareness and communicating staff needs and university policies.

### DEVELOPING MEASURABLE AND CONSISTENT WORK STANDARDS

**Definition:** The work standard is written as a results statement -- the condition that exists when the job result is accomplished. Good work standards have these eight characteristics:  
(Source: PERFORMANCE APPRAISAL: An Investment in Human Capital, CUPA)

1. They are based on the job, not the person performing the job
2. They are achievable
3. They are understood
4. They are agreed upon by the supervisor and employee
5. They are as specific and measurable as possible
6. They are time-oriented
7. They are written
8. They are subject to change

The work standard is the central element of the profile, a clear statement of the effect when the job result is accomplished the way it is expected to be accomplished. It is the purpose of performance, or the result of behavior. The work standard specifically avoids describing the employee's behavior that produces the result. Behavioral statements focus the attention of the conversation on the employee instead of the work. The more tangible the job, the more tangibly the criterion can be stated - for example, frequency, time, number, speed, or errors allowed can be spelled out. Don't shy away from identifying less tangible human values, such as tact, but don't focus directly on the value. Instead, focus on what the value produces. Tact, for example, produces rapport or ameliorates disagreements. Don't focus on creativity; instead identify the production of new products or methods. Look at what you get, not what you do. Sometimes, you will start to write a vague term, such as "promptly". Catch yourself and use the opportunity to clarify the condition. For example, "promptly" might be better stated as "by the third working day of the month." Still, you may find that it simply makes more sense to describe the condition you want as "on time" and make it clear that the deadline must be specified to an employee when work begins and kept up to date as circumstances change.

**Tip:** Study the job result. What is an observable event that tells you that the result has been accomplished? Start writing the statement with a noun, and write in the present tense. Do not start with a verb or adverb or use modifiers that are imprecise (for example, "usually"). A verb forces you to write about employee behaviors.

Job responsibility/result statement: Prepares typed letters, memos, reports, manuscripts, and other departmental correspondence and records by transcribing dictation, written notes, or printed matter.

Example of work standard written **incorrectly**: Types (*verb*) without error and returns work quickly. (*imprecise*)

Example of work standard written **correctly**: Documents (*noun*) are typed as dictated and returned without error on time. (*precise*)

### Examples of job responsibility statements and written work standards

**Job responsibility/result:** Provides information and direction by greeting staff, patrons, or guests in person or by multi-line telephone and providing information pertaining to organizational procedures and policies and/or routing them to the appropriate personnel.

**Work standard (start with a noun):** Staff, patrons, and guests are greeted, assisted and directed in a manner which promotes a positive and professional image of the Administrative Offices, the Libraries, and the University.

**Job responsibility/result:** Provides clerical and administrative support for the office and for other departments in the Libraries by preparing correspondence, paperwork, surveys, reports, etc. and for maintaining all filing for the Administrative Offices

**Work standard (start with a noun):** Correspondence, paperwork, surveys, and reports, etc. are prepared and appropriately routed with minimal error and on time. All filing is kept up-to-date.

***Job responsibility/result:*** Processes check requests pertaining to the Libraries' General Operations Budget by verifying accuracy of expenditures and mailing vendor check disbursements.

***Work standard (start with a noun):*** Check requests and vendor check disbursements are verified for accuracy and processed in a timely manner.

***Job responsibility/result:*** Maintains efficient communication of information to on-campus departments by making daily deliveries to on-campus departments.

***Work standard (start with a noun):*** Deliver and retrieve all appropriate documents, paperwork, etc. from on-campus departments as requested on a daily basis maintaining security and confidentiality of delivery if necessary.

***Job responsibility/result:*** Maintains Administrative Offices supply cabinets by frequent review of needs and processing orders for needed or requested items.

***Work standard (start with a noun):*** Supplies are ordered as needed or requested and orders are monitored until receipt.

***Job responsibility/result:*** Maintains flexibility and awareness of changes and needs in the office and organization by assuming similar duties and responsibilities as assigned.

***Work standard (start with a noun):*** Duties which are similar in level and in nature to the specific duties listed above are assumed as assigned with a willing attitude and helpful demeanor.

***Job responsibility/result:*** Provides clerical and accounting support and services for the Libraries personnel program by completing appropriate correspondence, affirmative action checklists and budgetary reports for hiring, termination, status changes, promotion, reclassification, evaluation, etc., and by compiling statistical information and/or complete questionnaires and surveys.

***Work standard (start with a noun):*** Paperwork and accounting is completed with minimal error and on time.

**Designed and updated by: Florence E. King  
AUL for Human Resources  
November 2008**