

# The Standard Employee Input Document Guide

This document is used by employees in the Planning and Planned Check-In Phases of the Performance Management Process. This document allows employees to share input with their supervisors on what they do day to day as well as what they think some goals for their position might be.



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Employee's First and Last Name: Kimberly Employee

Review Period: June 1, 2020 - May 31, 2021

This section explains the purpose of the document

## Employee Input Document

While it is a supervisor's responsibility to set expectations for their employees, receiving input from employees on what they do day-to-day as well as what they think some goals for their position might be is a great way to start planning for the performance year. This document can be used for that purpose during both Step 1: Employee Self-Planning and Step 4: Employee Planned Check-In phases of the Performance Management Process.

### Instructions:

These instructions help employees know what to include in the document as well as the best naming convention for saving

- **Step 1: Employee Self-Planning:** List as few as five and up to ten Position Responsibilities & Supporting Duties/ Position Goals / Previously Identified Development Needs in the Employee Self-Planning section.
  - When complete, name your form: *lastname\_firstname\_Planning\_year* (ex: Petrie\_George\_Planning\_2020).
- **Step 4: Employee Planned Check-In:** Date and update or adjust any of the Position Responsibilities & Supporting Duties/ Position Goals / Previously Identified Development Needs added during Planning. Additions may be made at this time as well.
  - When complete, name your form: *lastname\_firstname\_Check-in\_year* (ex: Petrie\_George\_Check-in\_2020).

Just prior to your Planning Meeting with your Supervisor, date and add your primary position responsibilities and supporting duties

#### 1. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: 08/30/2020: I provide budget preparation, tracking, monitoring and auditing, payroll processing, travel/expense voucher processing and other accounting and financial tasks.

#### Employee Updates for Planned Check-in (Step 4):

Date: 01/12/21

Add changes to this expectation: No update at this time. I've completed all of this in a timely manner.

Later, just prior to the Planned Check-in, add any updates to this responsibility

#### 2. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: 08/30/2020: I perform multiple duties which are a mix of administrative and clerical in nature, which may include but not limited to data gathering, data management, correspondence, filing, calendar management, event scheduling, answering phones, organizing mail, purchasing/ordering supplies, and website maintenance.

#### Employee Updates for Planned Check-in (Step 4):

Date: 01/12/21

Add changes to this expectation: No update at this time. All of this has been completed on time.

#### 3. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: 08/30/2020: Advise staff, students, administrators, and clients of standard policies or procedures.

#### Employee Updates for Planned Check-in (Step 4):

Date: 01/12/21

Add changes to this expectation: I created a new notebook of our standard policies and procedures for new employees to review as part of our onboarding process. While putting together the book, I wonder if there aren't a few process/procedures we could update to make things more efficient. I'd like to talk to you about this a bit more when we have our check-in meeting.

If you have some something you'd like to discuss, feel free to include that desire in this document



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This is a position goal. Notice that it is SMART: Specific, Measureable, Achievable, Relevant, and Timebound

### Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: 08/30/2020: Reduce supply spending by 10% within six months.

### Employee Updates for Planned Check-in (Step 4):

Date: 01/12/21

Add changes to this expectation: I've been given a new project and my priorities have shifted. I would like to change the timetable on this goal to one year rather than six months. Could we also add it to next year's planning to continue tracking?

Here, the employee asked for this goal to be extended due to shifting priorities

The new priority has been added here

This is a development need. Notice how the employee asks for guidance as well as the update in the Planned Check-in

### 5. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: I have recently taken on student supervisory duties. With little to no supervisory experience, I need to improve my supervisory skills. Would you provide some guidance on good PD classes to take?

### Employee Updates for Planned Check-in (Step 4):

Date: 01/12/20

Add changes to this expectation: I have completed Management Fundamentals and am taking Working People soon. Would also be okay if I enrolled in the Supervisor Pathways Program? I think it would be helpful for growing as a supervisor both now and possible in the future?

### 6. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need: 01/12/20: Back in November, the Dean has asked our department to take on the task of planning a virtual conference for March. I put together a task force and have delegated many responsibilities to those on the force with myself overseeing the whole conference. So far, everything is on schedule. I can provide a list of priorities if needed.

### Employee Updates for Planned Check-in (Step 4):

Date:

Add changes to this expectation:

### 7. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need:

### Employee Updates for Planned Check-in (Step 4):

Date:

Add changes to this expectation:

### 8. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need:

### Employee Updates for Planned Check-in (Step 4):

Date:

Add changes to this expectation:

### 9. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need:

### Employee Updates for Planned Check-in (Step 4):

Date:

Add changes to this expectation:

### 10. Employee Self-Planning (Step 1):

Add a Position Responsibility & Supporting Duties / Position Goal / Previously Identified Development Need:

### Employee Updates for Planned Check-in (Step 4):

Date:

Add changes to this expectation:

