

EXAMPLE OF TYPE OF DETAIL TO BE INCLUDED IN PERFORMANCE IMPROVEMENT PLAN–

PERFORMANCE MANAGEMENT PLAN FOR ----- EMPLOYEE'S NAME

Position: Administrative Officer (Classification Level) (Work Unit)

Assessment date: / /

Conducted by: Manager (Work Unit)

Primary Objective – Specify areas of unsatisfactory performance and establish management and review process to facilitate skills development and performance improvement.

Key responsibility (from Job Description)	Specific Tasks & Competencies	Performance Standard	How Measured	Outcome	If needs improvement what support has been provided or is required	Comments (Manager's & employee's response as appropriate)
1. Provide secretarial and computer support services to the staff and the Manager	Secretarial Take phone messages, being aware of client confidentiality	Accurate messages taken Confidentiality maintained	Satisfactory feedback from staff, supervisor & Manager Legitimate client complaints	Achieved Needs Improvement	Supervisor works one on one and provides job coaching & 1 day Customer Service Training course provided Yes	
	Forward faxes and hand delivered items to relevant staff member	Faxes etc forwarded on receipt	Direct observation by Manager	Achieved Needs Improvement		

	<p>as soon as possible after receipt</p> <p>Collect & deliver mail twice daily from/to Registry & sort & put in Manager's in tray & staffs' folders.</p> <p>Collection/Delivery of mail to wait until another staff member is on hand to answer the front counter/phone</p>	<p>Mail collected & delivered twice daily</p>	<p>Feedback from Registry Manager</p> <p>Satisfactory staff feedback</p> <p>Legitimate complaints from clients</p>	<p>Achieved Needs Improvement</p> <p>Achieved Needs Improvement</p>	<p>Daily routine developed in consultation with employee & work unit.</p> <p>Staff support ensured</p>	
	<p>Carry out word processing tasks – charts, forms etc at request of Manager within prescribe timeframe.</p> <p>Computer Check email regularly and take appropriate action</p> <p>Enter expenditure in budget spreadsheet each time purchase completed.</p>	<p>Tasks undertaken in specified & mutually agreed to timeframe</p> <p>E-mails actioned in a timely manner</p> <p>Spreadsheet updated regularly</p>	<p>Satisfactory feedback from Manager</p> <p>Satisfactory feedback from staff and Manager</p> <p>Satisfactory feedback from Finance Officer</p>	<p>Achieved Needs Improvement</p> <p>Achieved Needs Improvement</p> <p>Achieved Needs Improvement</p>	<p>Time management course to be organised</p> <p>Yes</p> <p>Shadowing staff member in purchasing is required</p>	

	Maintain Library, circulate literature to staff then file	Literature available & accessible to staff	Satisfactory feedback from staff	Achieved Needs Improvement	Yes	
2. Provide a reception service to internal & external clients & maintain a tidy reception area.	As first point of contact for internal/external clients (face to face, email & phone) provide assistance & service to clients renewing registrations/permits & licenses over the counter in a knowledgeable manner whilst using effective communication skills & maintaining confidentiality Screen registration applications, market & food stall permits	Advice provided is correct Interactions with clients are handled in a polite & sensitive manner Confidentiality is maintained	Legitimate client complaints Satisfactory feedback from staff & Manager	Achieved Needs Improvement	Customer service workshop has been provided	
		Permits contain correct information Clients are advised of mistakes politely and correct details provided	Satisfactory feedback from staff & Manager and clients	Achieved Needs Improvement	Supervisor to go thru applications one on one to explain information required	
	Register complaints on database	Information is updated regularly		Achieved Needs Improvement	Yes	
	Ensure reception area handouts in tidy condition with stocks	Brochure stands maintained. Low stocks	Satisfactory feedback from staff and	Achieved Needs Improvement	Yes	

	Collect initial info from clients in tactful & sensitive manner	Info collected is accurate	No client or staff complaints	Achieved Needs Improvement	Yes	
	Efficient transfer of calls from internal clients	Minimal delays & disruption	Satisfactory feedback from internal clients and staff	Achieve Needs Improvement	Yes	
	Arrange appts/meetings as directed	Appts etc made – note clashes and liase with staff to identify suitable times	Satisfactory feedback from staff and manager	Achieved Needs Improvement	Yes	
	Maintain Mgrs Lotus Notes calendar	Calendar accurately maintained	Direct observation & feedback from Mgr	Achieved Needs Improvement	Training course on Lotus Notes Calendar provided	

I have read the above & agree with the assessment, comments and actions arising. I agree with the review date of / /

Name: _____ Date: _____

Manager's name & work unit _____ Date: _____