**Developing a Performance Plan: Set Expectations of the Job**

**Content of the Discussion:**

Introduce new job description or update in old job description

* Identify results people need to focus on
* Identify tools, if any (i.e., software) needed for successful achievement of results
* Identify behaviors needed for successful achievement of results
* Identify measurements for monitoring performance (how and when to track progress)

**Structure of the Discussion:**

1. **Begin** by stating the purpose of setting expectations of the job and why it’s important to have this discussion.

Example:

*“Today we’re going to work on defining exactly what results we need to have for the different areas of your job.*

*“This will help you feel clear on what you need to do and how to monitor your progress. Checking your progress will let you know when and how to get back on track.”*

1. **Elaborate** on the process for setting expectations.

Example:

*“We’ll talk about each duty or task you need to accomplish, what the results look like, and how to monitor your progress. Then we’ll talk about what kinds of behaviors are needed to accomplish the results successfully, what that looks like, and how to monitor your progress there.*

*I’d like to have your input on going about this since you are the person performing the job.”*

1. **Develop** the details and **Agree** on each one.

* Here you’ll go through each result area, what success looks like, the behavior needed to accomplish the result, the tools and support needed, and how to track or monitor progress.

Example:

*“Let’s take a look at this job duty: ‘*Approach repair work critically to ensure that the repair is actually the best solution, and make recommendations to the pastor on better alternative solutions or approaches, if applicable*.’ For example, if you’ve repaired or ordered a repair a number of times on a piece of equipment, you may want to recommend to me that we buy or lease another piece of equipment.”*

1. **Summarize** the discussion and encourage the employee.

Example:

*“We talked about my expectations of performance for this job. Then we went through each item to CLARIFY details on what successful performance looks like. You’ve given me your input on some of those, which I appreciate. In some instances I pointed out specific examples of what needs to change and how that needs to happen. We agreed to meet in (XXX days/weeks) to review progress together. Lastly, I want to tell you that I am confident that you can do this and am here to support you in any way I can. Do you have any questions or concerns?*