Planning Task

Step 1: Employee Self – Plan

Note: Each fiscal year there are two tasks to complete: Rating task for Performance over the past fiscal year and the Planning task to Plan for the coming fiscal year. These instructions are for the Planning task.

In this step we are planning for the things we want to accomplish in the next fiscal year.

Why should I complete the Self-Planning Task?

- To be more engaged in the appraisal process
- Gain greater insights and set future goals for improvement
- Feel more confident about your abilities
- Demonstrates accountability
- Gives you an opportunity to examine and clarify goals
- Helps to initiate a dialogue with your supervisor
- Allows you to focus on areas of Performance that are important to you
- Enhances the professional relationship between you and your supervisor
- Shows that you take your job seriously
- Minimizes stress of the Performance Review process

You are given a Voice – USE IT!
Take Ownership

Open the task from the Pending Performance Tasks box of your Welcome Page in Cornerstone

Select **Get Started** on the lower right portion of the screen to begin the Planning task.

Goals

What significant tasks or goals should be accomplished during the rated period?

Comments:

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Think of daily responsibilities, projects, issues, and problems. Are there things that you can realistically do this year to:
- Make more of a contribution in your Department
- Participate in current projects or develop those that may align with the Department's needs
- Create processes that provide solutions to issues and problems

The goals you list will be reviewed by your supervisor. Your entries indicate your investment in your position and provide valuable information to your supervisor.

Example:

What significant tasks or goals should be accomplished during the rated period?

Comments:

1. Develop a process to triage incoming requests, assign them to the appropriate person, then follow up to make sure request is fulfilled.
2. Increase the use of the online catalog by 50%.
   - Establish a committee to come up with possible solutions
   - Select then implement solution
   - Run usage report each month, pivot and reconvene committee if we are not getting moving in the right direction

Click **Save and Continue** to proceed to the next page of the Planning task.

Core Competencies

Core Competencies are the knowledge, skills, abilities, and behaviors that contribute to Performance. The first six core competencies listed apply to every employee. The last three apply to those who supervise other full-time employees.
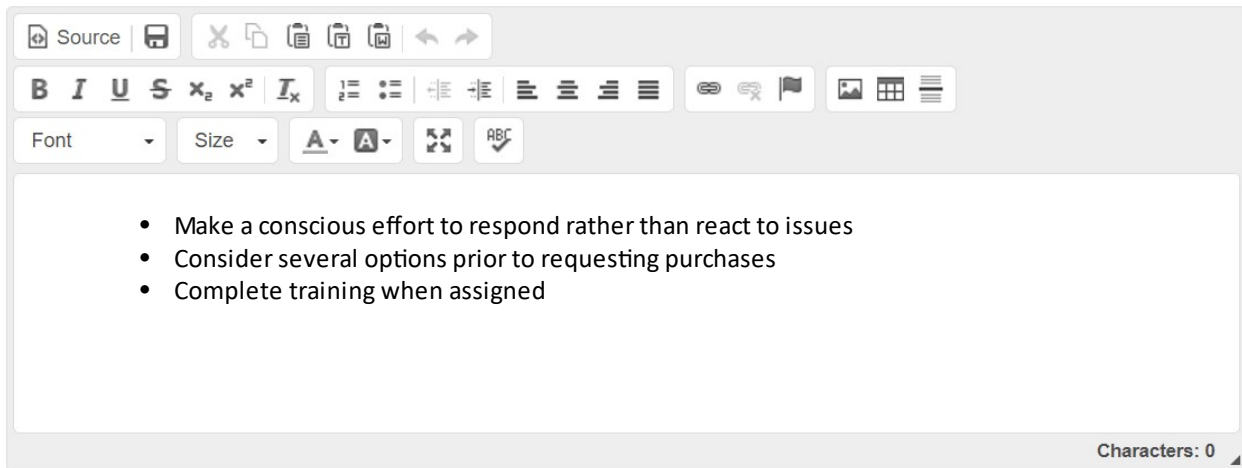
Enter what you plan to focus on regarding each competency during the fiscal year. What are the expectations that you have for yourself to improve, or maintain your Performance in each competency?

Example:

Integrity and Professional Conduct:

- Maintains professional composure and attitude.
- Ability to be a consistent, honest, and trustworthy steward of State resources.
- Adheres to University and departmental policies including but not limited to code of ethics, attendance, punctuality and dress code.
- Completes required training in time frame directed by supervisor or administration (this bullet will be rated separately in the rating task).

Comments:

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- Make a conscious effort to respond rather than react to issues
- Consider several options prior to requesting purchases
- Complete training when assigned

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Entries regarding competencies are not required but encouraged as it can create meaningful dialogue between the employee and supervisor.
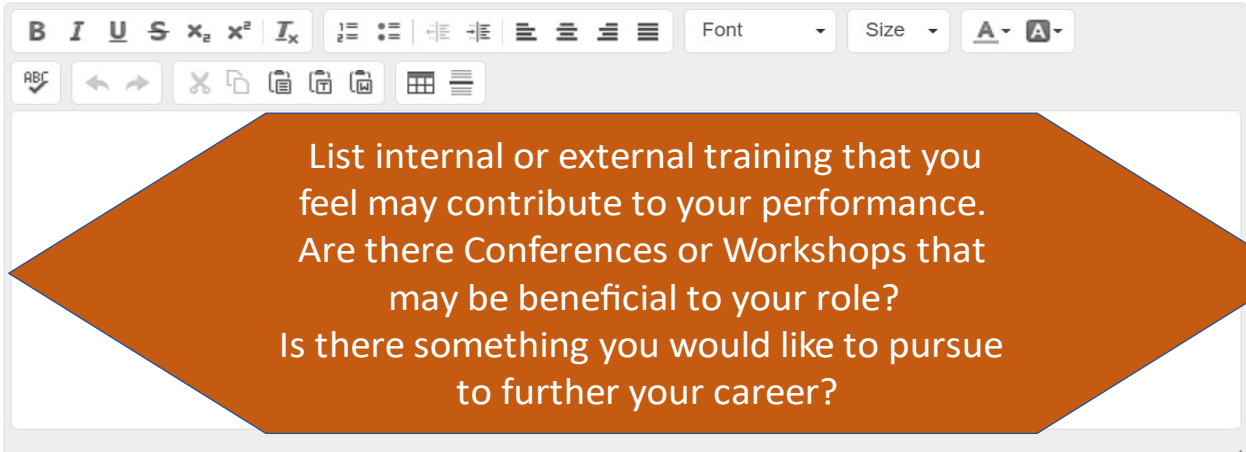
The final box on the Core Competency page allows you to enter knowledge, skills, abilities, or behaviors that apply to your position but were not covered in the Core Competencies listed.

Click **Save and Continue** to proceed to the next page of the Planning task.

Professional Development

Indicate specific training and professional activities to be completed in the next rating period that will contribute to development within your current role and/or facilitate future professional growth.
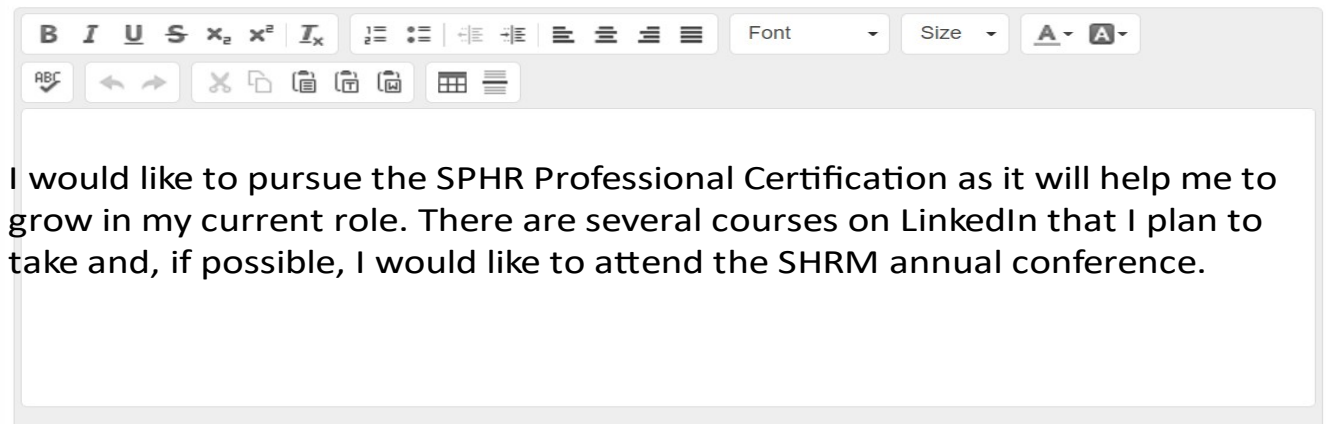
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List internal or external training that you feel may contribute to your performance.
Are there Conferences or Workshops that may be beneficial to your role?
Is there something you would like to pursue to further your career?

Example:

Indicate specific training and professional activities to be completed in the next rating period that will contribute to development within your current role and/or facilitate future professional growth.

Comments:

I would like to pursue the SPHR Professional Certification as it will help me to grow in my current role. There are several courses on LinkedIn that I plan to take and, if possible, I would like to attend the SHRM annual conference.

By providing this information to your supervisor, he/she can assist you in your Professional Development.

When you are satisfied with your entries, click **Submit** on the bottom right of the page.

Once Submitted, the task will move to the Supervisor's queue in Cornerstone