Step 2: Supervisor Review/Discussion/Sign-Off

In this step you will document the expectations for the employee for the next Fiscal Year.

Note: There will be two tasks for each person you supervise: A Rating task for the previous Fiscal Year performance and a Planning task for the coming fiscal year. These instructions address the Planning task.

Find the task for the Employee you will review in the Pending Performance Tasks block of the Welcome Page in Cornerstone.

<table>
<thead>
<tr>
<th>Pending Performance Tasks</th>
<th>Due Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Your Performance task for FY 24/25</td>
<td>5/10/2024</td>
</tr>
<tr>
<td>FY 24/25 Planning or Rating of Employee Name</td>
<td>7/1/2024</td>
</tr>
</tbody>
</table>
The Pending Performance Tasks box holds a maximum of 10 tasks. Overflow tasks can be found by clicking on the Performance Reviews icon on the Cornerstone Welcome Page:

- Review self-planning Goals entered by Employee
- Consider what this specific position should do to contribute to the achievement of the overall goals of Department
- *Second-line supervisor buy-in*
- Enter the Goals for the Fiscal Year
Suggested Process for Supervisors

Copy Employee’s Entries to your box and strike through, or add to, Employee’s comments

Example:

1. Develop a process to triage incoming requests, assign them to the appropriate person, then follow up to make sure request is fulfilled. **This process should be completed by the system analyst position**

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

3. Develop a training plan and cadence to provide compliance training for those with no computer access (facilities, housing, NIRC) proctor on-site training a minimum of 2 times at each facility before 6/15/23

The Supervisor should for edit, modify, or enter goals that are appropriate for the position.
Core Competencies are the knowledge, skills, abilities, and behaviors that contribute to Performance. Core competencies apply to every employee.

For each competency review comments entered by the employee.

**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:

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

Enter expectations for the fiscal year for each competency. Document those actions you would like the employee to stop, start, or sustain.
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).

**Expectation:**
- Continue demonstrating professional attitude
- Review Purchase requests with Supervisor
- Arrive prepared to work at 7:30 on workdays
- Complete 2023 required compliance training by 4/30/23

Don’t use evaluation statements like “you are trustworthy and honest”

The last three competencies listed are required for those who supervise full-time employees
- Delegation & Supervisory Skills
- Development of Direct Reports
- Performance Management

Those who do not supervise other full-time employees will not be evaluated on these competencies
Skills, Abilities, or Behaviors required for the position that are not included in the Core Competencies.

**This is an Optional Step.**

To add Competencies from the Competency bank:

**Additional Required Competencies**
Supervisors can also “write in” competencies and expectations:

The employee will be rated on his/her Performance on the Core Competencies and added competencies at the end of the fiscal year.
Competencies added to the Performance Planning task will be collectively rated at 15% of the Overall Rating.

**Professional Development**

Review entries made by employee then provide guidance or suggestions. Entries can be made to this area when you discuss the Planning with the employee. Enter suggestions for training, conferences, books to read, workshops to attend...

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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.

Pursuing this certificate will serve you well in your Professional endeavors. The local SHRM chapter offers workshops. I will provide you with a contact. I am not sure the budget will support a SHRM conference, however, we will try to get you to a CSOD Learning Product Academy this fiscal year.
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Changes to Position Descriptions must be submitted and approved through your chain of command.
Arrange a meeting with the employee to discuss the Planning. Review expectations for competencies as well as goals for the fiscal year. Go over Professional Development issues and the Position description with the Employee.

When all is clearly understood by both parties, advise the employee that the task will move to his/her queue for acknowledgement.
Once Submitted, the task will move back to the Employee’s queue in Cornerstone.