

Planning Task

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.

Pending Performance Tasks	
	Due Date
Your Performance task for FY 24/25	6/10/2024
FY 24/25 Planning or Rating of [Employee Name]	7/1/2024

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:



Goals

- 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

John E. Sussard (Self) Review : Approved revision (2) Time : 5/11/2022 11:29 AM

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

Less

Font Size A A

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

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
 - Supervisor will select solution, then committee will 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

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:

(Self)

5/11/2022 11:28 AM

- 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.

Additional Required 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

Select Competencies

Click Here

Competency Bank

- with diverse capabilities; accurately assesses the strengths and weaknesses of staff; develops successors.
- Business Knowledge
Demonstrates understanding of the department's mission, plans for short-term goals, financial planning and develops and enhances business practices and policies.
- Business Planning, Organizing & Scheduling, Strategy & Execution
The ability to develop, communicate and manage projects in a manner that aligns with the strategic plan and mission of the University.
- Customer Service
Meets the expectations and requirements of internal and external customers; establishes and maintains effective relationships with customers.
- Demonstrates Emotional Acuity
Considers and responds appropriately to the needs and feelings of

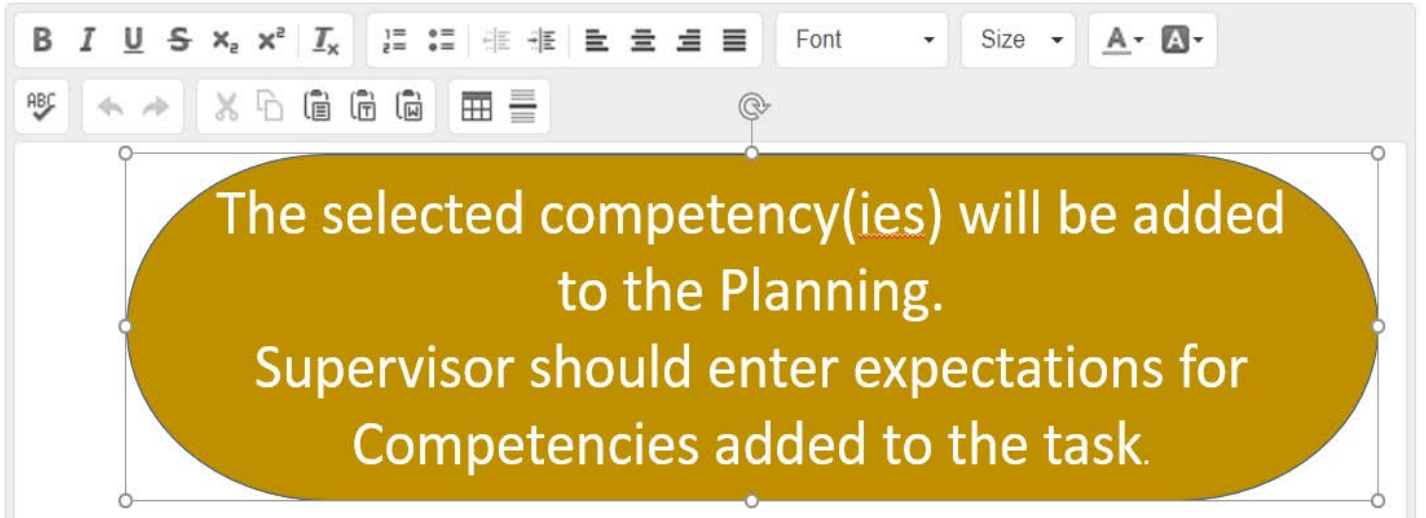
Cancel Add

Scroll through and check competencies to add.

Customer Service

Meets the expectations and requirements of internal and external customers; establishes and maintains effective relationships with customers.

Comments :



The screenshot shows a rich text editor interface. At the top, there are various formatting tools including bold (B), italic (I), underline (U), strikethrough (S), subscript (x₂), superscript (x²), and text color (I_x). There are also alignment and list tools, and dropdown menus for Font and Size. Below the toolbar, there are icons for undo, redo, cut, copy, paste, and insert. A yellow callout box is overlaid on the editor, containing the text: "The selected competency(ies) will be added to the Planning. Supervisor should enter expectations for Competencies added to the task."

Supervisors can also “write in” competencies and expectations:

Add any other competencies that are relevant to this position

Comments:



The screenshot shows the top portion of a rich text editor, including the same toolbar as seen in the previous image. The text area below the toolbar is currently empty.

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...

Provide guidance, make helpful suggestions and follow through

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:

d (Self)

Time : 5/11/2022 11:29 AM

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.

B I U S x₂ x² I_x Font Size **A** **A**

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

Position Description



999868|Manager, Business Services
1/1/2020 - 12/31/2020

Select Options then
Employee Details to
see the Position
Description on file
with HR

Options ▾

- Add Co-Planners
- Attachments
- Employee Details
- Complete Offline
- Upload Review
- Print Review
- Print Reviewee Version

Position Description

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.

By your electronic signature you acknowledge that you have discussed the competencies with this employee and he/she understands the expectations for the review period.

I acknowledge that providing my electronic approval is equivalent to signing this document and I understand that my electronic signature is binding.

Second Level Evaluator

Manual Signature on the printable version

Sign

Comment

B I U S Ix [List Icons] [ABC]

Check Box
Click "Sign"
Then Submit

Back Save and Exit Submit

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

