Fiscal Year 22/23 Planning Task

Step 2: Supervisor Review/Discussion/Sign-Off

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

This Task involves Planning for things that should be accomplished from July 1, 2022 through June 30, 2023.
This box holds a maximum of 10 tasks. Additional tasks should be accessed by clicking on the Navigation Icon then Performance, then Performance Reviews.

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
**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, NIR) 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.

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

Example:

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”
Skills, Abilities, or Behaviors required for this position that are not included in the Core Competencies.

Regardless if you add one competency or several, Competencies added in this section will account for 20% of the Overall Rating.

Competencies can be added from our Competency bank:

Enter the competency then Search.
The example below is to add the "Customer Service" competency to the employee’s planning task:

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:

The employee will be rated on his/her Performance on the Core Competencies and added competencies at the end of the fiscal year.

Professional Development

Review entries made by employee (if any) 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.

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

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

Enter changes to the Position Description in the Comment box

*submit changes to HR Business Partner for approval

- Job Summary
- Required Education and Experience
- Required Knowledge Skills and Abilities
- Essential Functions
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

Comment

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