Quick Reference:
Staff Performance Management – Preparing the Planning Stage

Note: This quick reference is for use with the NEW 2018 – 2019 Staff Performance Management Planning and Evaluation Form.

General Information: The planning stage should occur 4-6 weeks after the previous year’s evaluation. This conversation between the supervisor and employee should be future-oriented. The Office of Human Resources recommends supervisors review the planning stages of their direct reports with their direct supervisors (the reviewer) to ensure alignment with department goals. Your HR partner or Employee Relations manager is available to assist you in completing the planning stage.

Step I: Complete the sections that have orange instructional boxes. The sections marked ☒ are to be completed during the evaluation stage.

Step II: Complete the section in purple after the employee, supervisor and reviewer (optional) have reviewed the planning stage.

Employee Information Section
Enter employee information in the requested fields.

Note: The size of the paragraph text box expands once all text is entered. Hover over each field for clarification on how to complete a specific action. If the supervisor or employee cannot provide the requested information, please contact your HR partner.

Important Information: All supervisors of staff in regular FTE positions are required to complete, in conjunction with the employee, an annual performance management planning and evaluation form. While temporary employees (employees in time-limited positions (TLP), temporary grant positions (TGP) and temporary positions) are not required to do so, OHR highly encourages supervisors to follow the performance management process with all their employees.

Planning Stage Acknowledgement Section
Complete this section after all the planning stage information has been entered on the remaining pages of the form and the document has been reviewed by the employee, the rater and the reviewer (optional).

Note: The ‘Rater’ is the employee’s direct supervisor; the ‘Reviewer’ signature line, which is optional during the planning stage, is designated for the direct supervisor’s supervisor.

Important Information: As part of the annual planning stage, the employee and the supervisor should review the employee’s position description (PD) for accuracy and relevancy. If necessary, the PD should be updated with your HR partner and submitted to OHR.
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General: Job Functions Section

During the planning stage, supervisors and employees work to provide information on job duties and success criteria for the upcoming year.

Job Duties and Success Criteria Sections

For each job duty section, enter one of the job duties that corresponds with the employee’s position description and relates to what the employee is expected to do on the job. By default, the form provides four job duty fields, but additional job duty fields can be added at the bottom of the section.

For each job duty listed, enter success criteria on the planning stage. Each criterion should be formatted as a S.M.A.R.T. goal:

S – Specific
M – Measurable
A – Attainable
R – Relevant
T – Time-Bound

What are S.M.A.R.T. Goals?

- S.M.A.R.T. goals state the important results the employee is working to achieve.
- S.M.A.R.T. goals create clear and mutual understanding of performance expectations.
- S.M.A.R.T. goals for job duties are appropriate to the level of the position. They address all major job responsibilities and deliverables and align with higher-level goals.
- Goals are at a high enough level to encompass the core outcomes for which the employee is responsible but specific and clear enough so both the employee and supervisor are able to measure success.
- Performance goals include both ongoing program responsibilities and any new projects, assignments, priorities, or initiatives specific to this performance cycle.
- For most employees, many goals are based on ongoing responsibilities and may not change much, if at all, from year to year.
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Add Job Duties
Click Add Job Duty button to add an additional job duty field to the form.
Note: If you selected Add Job Duty but would like to remove the extra field, click the Remove Job Duty button. The Remove Job Duty button does not remove the job duty fields pre-populated on the form.
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General: Competencies Section
Effective 2015, all position descriptions for classified and unclassified FTE positions include specific competencies for the position chosen from a list of nine competencies provided by the Office of Human Resources. Competencies define the behaviors or characteristics critical to the employee’s ability to perform the job.

For staff performance management, this section of the form should emphasize competencies important to successful performance of the job functions and objectives detailed in the planning stage.

Important Information: All supervisors are to be rated on the competency “Supervision and Management.”

Note: Recommended number of competencies to list in this section: 1 to 3

Competency Section
Select each competency from the drop-down boxes provided. Based on your selection, the gray box below the selection will automatically populate the competency definition. To review all competencies and their definitions, click here.

Add Competency
Click Add Competency button to add an additional competency field to the form.

Note: If you selected Add Competency but would like to remove the extra field, click the Remove Competency button. The Remove Competency button does not remove the competency fields pre-populated on the form.
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**General: ClemsonForward Section**

For the next section of the planning stage, **review and reference** the mission and Clemson Forward strategic plan summary provided on this page.

To review the entire Clemson Forward strategic plan, click [here](#).

**Note:** Departments are not expected to contribute to every strategic priority. Be realistic about where your department/unit goals “fit,” using the definitions as a guide. Administrative and support units may find ways to align with ClemsonForward through their responsibilities for one of the four key enablers.
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General: Employee Objectives in Support of Clemson Forward Section
Clemson University’s success is directly connected to the support and participation of its employees. This section of the planning stage is designed to create a clear connection between individual employee contributions and the University’s strategic plan and priorities.

Strategic priorities should (1) be directly related to the employee’s job, and (2) support stated ClemsonForward initiatives.

Note: Each employee is to be rated on at least one ClemsonForward objective. The employee and the supervisor should choose the objective(s) collaboratively.

Employee Objectives in Support of Clemson Forward Section
Select from the drop-down box, at least one strategic priority the employee will support. Based on your selection, the gray box below will automatically populate a summary of the selected strategic priority. An "Other" option is available for detailing objectives that align with multiple strategic priorities or objectives not included in the REAL objectives.

Strategic Priority Success Criteria Section
After discussion on how the strategic priority relates to the employee’s position, define in the Objective and success criteria section what the employee should accomplish or demonstrate during the year. Success criteria should follow S.M.A.R.T goal format. (Click to review goal format.)

Example Application: Strategic Priority: Living - Clemson will enhance the living environment to make the University an outstanding place to live, learn and work while also increasing diversity and a climate of inclusive excellence. Objective and success criteria: Employee will participate in at least two learning and development opportunities (i.e. webinar, instructor-led, conference, etc.) on building customer service techniques over the next six months. Employee will use information from sessions to create customized, 60-minute sessions and deliver the sessions to customer service teammates during quarterly staff meetings.

Add Strategic Priority
Click Add Strategic Priority button to add a strategic priority field to the form.

Note: If you selected Add Strategic Priority but would like to remove the extra field, click the Remove Strategic Priority button. The Remove Strategic Priority button does not remove the strategic priority fields pre-populated on the form.
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General: Additional Objectives Section
This optional section is for the supervisor or employee to set additional objectives for the upcoming performance year. These objectives can relate to performance improvement, professional development, or support of a department or unit objective.

Employee Additional Objective Section
After discussion, describe each additional objective and the success criteria. Define what the employee should accomplish or demonstrate during the year. Success criteria should follow S.M.A.R.T goal format. (Click to review goal format.)

Add Objective
Click Add Objective button to add objective and success criteria and performance fields to the form.
Note: If you selected Add Objective but would like to remove the extra field, click the Remove Objective button. The Remove Objective button does not remove the objective field pre-populated on the form.