Quick Reference:
Staff Performance Management – Preparing the Planning Stage

Special User Notes: This quick reference makes preparing your planning stage simple!

**Step I:** Complete the sections that have **orange** instructional boxes. Do not complete sections marked **X**. All fields are free text - the size of the box will not get larger, as more text is entered, however the font size will decrease.

**Step II:** Complete the section in **purple** – once the employee, supervisor and supervisor’s supervisor have reviewed the planning stage.

**Step III:** Once a Planning Stage has been completed, it should be reviewed by both the supervisor and employee and approved by the reviewer (supervisor’s supervisor). Supervisors should retain Planning Stage documents and revise these documents as needed.

**Employee Information Section**
Enter employee information in the requested fields.

**Note:** If the supervisor or employee cannot complete the information in these requested fields, contact your HR partner.

**Important Information:** Time-limited positions (TLP), temporary grant positions (TGP) and temporary employees are not required to complete a performance management planning and evaluation form, but the Office of Human Resources highly encourages supervisors to follow the performance management process with their employees.

**Planning Stage Acknowledgement Section**
Return to this portion to complete this information once the planning stage information is input on the remaining pages of the form.

**Note:** The ‘Rating Officer’ is the employee’s direct supervisor; the ‘Reviewer’ is the direct supervisor’s supervisor.

The planning stage should occur 4-6 weeks after the previous year’s evaluation. This conversation between the supervisor and employee should be forward looking. Supervisors should review their employees’ planning stages with their direct supervisors (the Reviewer) to ensure alignment to department goals. Your HR partner is available to assist you in completing the planning stage.
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General: Job Functions Section
During the planning stage, supervisors and employees work to provide information on job functions and success criteria for the year.

Job Duties Sections
For each of the job duties, enter the job duty of the employee that corresponds with the employee’s position description and relates to what the employee is expected to perform.

Success Criteria Sections
For each job duty listed, enter success criteria on the planning stage. Criteria should be S.M.A.R.T. goals:

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

Click this button to access an additional page where you can add job duties to your planning stage. This will open up a new pdf that will need to be saved as a separate document.

It is recommended that, for any given review year, each employee be rated on 3 to 5 job duties. 5 is the maximum.
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General: Performance Characteristics Section
Performance characteristics and their definitions should be directly related to the employee’s job.

Each Performance Characteristics Section
Click here to review, copy and paste from a list of performance characteristics. Repeat this throughout the Performance Characteristics section.

Each Definition Section
Define how the performance characteristic should be accomplished or demonstrated by the employee during the year. Link the performance characteristic to specific job duties if possible.
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ClemsonForward Section
Review and reference for the next sections the mission and Clemson Forward strategic plan summary provided on this page.
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**General: Employee Objectives in Support of Clemson Forward Section**

Strategic priorities should:
- be directly related to the employee’s job, and
- support stated ClemsonForward initiatives.

**Select at Least 1 Employee Objective/Strategic Priority in Support of Clemson Forward Section**

Use the drop-down feature to choose the appropriate strategic priority this employee will support. A summary of that strategic priority will automatically populate the empty text field.

**Each Success Criteria Section**

For each success criteria (if you choose to do more than the one required), define how the objective should be accomplished or demonstrated by the employee during the year. Each definition should be S.M.A.R.T. goals:

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

**Note:** Objectives should be project based and have the possibility to be completed within the review year.
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**General: Additional Objectives Section**
This section is optional. These additional objectives can relate to performance improvement, professional development, support of ClemsonForward, or support a departmental objective.

**Each Success Criteria for Optional Additional Objectives**
For each success criteria (if you choose to do an optional additional objective), define how success will be demonstrated by the employee during the year. Each definition should be S.M.A.R.T. goals:

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