CALS STAFF PERFORMANCE PLANNING CHECKLIST

Completing the ONLINE Staff Performance PLAN

Performance Plans for **NEW** employees may be done by either the supervisor or the employee. Performance Plans for **EXISTING** employees may be rolled over from the previous year. Plans do not need to be sent to the Reviewer unless requested by your Reviewer. See instructions below, starting with Step 1.

1. ★ Always start performance planning with a review of the employee Position Description to ensure accuracy. The performance plan you will create is based from the employee Position Description. Note that these are two separate documents, and are not the same as the Performance Evaluation.

   A. Position Description: is found in PeopleAdmin, and is a summary of the role, describes responsibilities of the employee in the position, provides a comprehensive look at the position duties and purpose, and is the primary document used for recruiting for the position.
   B. Performance Plan: is created in HokieSpa (HokieTeam), lists goals and metrics specific to the current plan year, and includes competencies and career development items.
   C. Performance Evaluation: is created at the end of the review cycle in HokieSpa (HokieTeam) to provide a comprehensive review of the employee's achievement of goals outlined in the Performance Plan.

2. *I want to complete a Performance Plan for a **NEW** employee and I am the*:

Employee – (Skip to Section **3**)
Supervisor – (Skip to Section **4**)
OR

*I want to complete a Performance Plan for an **EXISTING** employee. Last year's evaluation was approved in the system by the employee which will allow me to proceed with establishing this year's plan. I am the:*

Supervisor - (Skip to Section **5**)
Employee – (Skip to Section **6)**

3. To completing a Performance Plan for a **NEW** employee (being completed by the employee), seek input from your supervisor for goals (what you will accomplish) and metrics (how they should be accomplished). Then start the process in Hokie Spa, click on the Hokie Team tab, and then select "Performance Planning and Evaluation Tool". On the Performance Main Menu, select "Performance Plan Menu". Then select "Create/Edit Plan".

   A. Select "Create a New Goal". Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
   B. Select "Continue to Competencies". Select 3-5 competencies by clicking on the box next to the competency and it will be added to the plan.
   C. Select "Continue to Career Development". Enter items that employee and supervisor are responsible for.
   D. Select "View Performance Plan". Review for accuracy. Once satisfied, select:
      - ❑ "Send to Supervisor". The plan will be sent to the supervisor for input.
      - ❑ The supervisor will be able to edit the plan and return it to the employee for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the supervisor to be satisfied with the plan.
      - ❑ The employee must go into the system and approve the plan to finish the planning process.

4. To complete a Performance Plan for a **NEW** employee (being completed by the supervisor), start the process in Hokie Spa. Then click on the Hokie Team tab, and then select "Performance Planning and Evaluation Tool". On the Performance Main Menu, select "Performance Plan Menu". Then select "List employees where I am defined as the supervisor".

A. For the employee you wish, select "View Plan". Then select "Create/Edit Plan". (*If you have no new employees, skip to the next step "For each EXISTING employee".)*
B. Select "Create a New Goal". Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
C. Select "Continue to Competencies". Select 3-5 competencies for your employee by clicking on the box next to the competency and it will be added to the plan.
D. Select "Continue to Career Development". Enter items that employee and supervisor are responsible for.
E. Select "View Performance Plan". Review for accuracy. Once satisfied, select EITHER:
   - ❑ "Send back to employee for input". The employee will be able to edit the plan and return it to you for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the employee to be satisfied with the plan. OR
   - ❑ "Finalize and send to employee". This is normally selected if the employee was the one who began the plan.
   - ❑ The employee must go in and approve the plan to finish the planning process.

5. To complete a Performance Plan for an **EXISTING** employee (being completed by the supervisor), start the process in Hokie Spa. Then click on the Hokie Team tab, and then select "Performance Planning and Evaluation Tool". On the Performance Main Menu, select "Performance Plan Menu". Then select "List employees where I am defined as the supervisor".

A. For each employee (one at a time) select "View History". There, you will find the prior year's plan and you will be able to select "View Plan". You may then select "Copy to Next Plan Year". On the next screen, you will indicate that you wish to create a plan for 2015 by selecting "Create Performance Plan". When you click this, goals & metrics, competencies, and career development plans from last year are copied over to the current plan and may be edited to suit this year's needs. You may add or subtract goals, or leave it as it is to use again for the current year by skipping to section 5E below.
B. To add a goal, Select "Create a New Goal". Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
C. Select "Continue to Competencies". Select 3-5 competencies for your employee by clicking on the box next to the competency and it will be added to the plan.
D. Select "Continue to Career Development". Enter items that employee and supervisor are responsible for.
E. Select "View Performance Plan". Review for accuracy. Once satisfied, select EITHER:
   - ❑ "Send back to employee for input". The employee will be able to edit the plan and return it to you for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the employee to be satisfied with the plan. OR
   - ❑ "Finalize and send to employee". This is normally selected if the employee was the one who began the plan.

F. The employee must log in and approve the plan to finish the planning process.

For questions about Performance Management, Planning & Evaluation, please contact:
April L. Wood, CALS HR Manager (540) 231-3003 or AprilWood@vt.edu

6. To complete a Performance Plan for an **EXISTING** employee (being completed by the employee), start the process in Hokie Spa. Then click on the Hokie Team tab, and then select "Performance Planning and Evaluation Tool". On the Performance Main Menu, select "Performance Plan Menu". Then select "Create/Edit Performance Plan". The previous year's plan will appear. Scroll to the bottom and click "Copy to Next Plan Year". On the next screen, you will indicate that you wish to create a plan for 2015 by selecting "Create Performance Plan". When you click this, goals & metrics, competencies, and career development plans from last year are copied over to the current plan and may be edited to suit this year's needs. You may add or subtract goals, or leave it as it is to use again for the current year by skipping to section 6D below.

A. To add a goal, Select "Create a New Goal". Enter a goal and metrics for reaching the goal. Most employees have 3-5 goals.
B. Select "Continue to Competencies". Select 3-5 competencies for your employee by clicking on the box next to the competency and it will be added to the plan.
C. Select "Continue to Career Development". Enter items that employee and supervisor are responsible for.
D. Select "View Performance Plan". Review for accuracy. Once satisfied, select:
    - ☐ "Send to Supervisor". The plan will be sent to the supervisor for input.
    - ☐ The supervisor will be able to edit the plan and return it to the employee for approval or for further modifications. Then you can repeat the steps as many times as needed for you and the supervisor to be satisfied with the plan.
E. The employee must go into the system and approve the plan to finish the planning process.

7. Once the planning for all employees is in the works, the supervisor can monitor where his/her employees are in the planning process by selecting "List employees where I am defined as the supervisor". There, the supervisor will see the status of each under "Plan Status". The plan is final when the status is "Employee Approved", which occurs when the Employee logs in and approves the plan in the system.