



ONBOARDING GUIDE FOR MANAGERS

Your Role in Onboarding

Dear Manager,

An employee's first weeks and months on the job are a critical time to begin building a successful working relationship. This is your opportunity to set goals and expectations, train new employees on job-specific tasks, and introduce them to others who will play a role in their professional development. In addition, everyone wants to feel like they are contributing at work; a good onboarding process can help employees feel comfortable and ready to work sooner if there is a formal or well-planned process.

This departmental onboarding guide is designed to give you structure to the process of welcoming and acculturating your new employee into USF and his/her new position. It is critical to officially welcome and orient your new employee to your part of the organization. It is time for you to "immerse" the employee in your specific department/college. The onboarding process doesn't happen in one day. It is an ongoing process. Provide the new hire with a formal orientation to your part of the organization within his/her first week of work.

Officially welcome your new employee

- Introduce new hire to the entire department
- Review department's mission and goals
- Provide historical overview
- Explain organizational structure
- Give tour of relevant offices
- Ask a peer to take the new hire out to lunch
- Provide new hire with a first week agenda; office procedures, people they will meet, technology they will be learning, etc.

The following checklists and links to additional tools are meant to be used as a general onboarding guide for managers. Your specific school, VP area, or department may have additional orientation guidelines, so contact your supervisor or department administrative contact to confirm any practices and procedures unique to your area.

Preparing for the New Employee's Arrival

Prepare work space/office assignment.

- Prepare offer letter, ensure all information is accurate including link for criminal background check process, send letter.
- Send an announcement/email to your department announcing the new hire and his/her background.
- Prepare work space. Inspect the work area to ensure it is clean and has all needed equipment and supplies. See "[Equipment and Supplies](#)" checklist.
- Pre arrival – call to answer any questions (parking, reminder of documents needed, lunch, etc.)
- Systems: Set up new hire's computer with email and software privileges.
- Make sure "new employee" is added to appropriate e-mail lists
- Prepare the first day and first week agenda for new hire.
- Review calendar to schedule appropriate meeting times during new hire's first month (if appropriate).
- Prepare welcome card
- Identify and assign buddy
- Identify necessary training & schedule
- Identify & prepare "pertinent reading material" for early days when the employee may have some bandwidth (including policies & procedures), have review HR Website, Explain role of HR partners
- Provide the employee with a new hire checklist

The First Week

Review Job Responsibilities

- Provide a copy of the job description and review job functions, competencies, and expectations for working in the department.

Review significant department/university policies

- Review security, safety and confidentiality procedures for your unit
- Go over department safety plan.
- Ensure new employee updates emergency contact information in GEMS Self Service.

Department Information:

- Review organizational structure of your department with employee.
- Distribute a list of acronyms typically used in the department.
- Review department's mission and strategic plan.
- Conduct tour of floor, building, other appropriate facilities, etc.

Phone

- Teach employee how to transfer calls, do conference calls, use voice mail, etc.
- Set up Voice mail account
- Discuss telephone etiquette
- Demonstrate use of online directory
- Provide list of department phone numbers and number of key resource people

Communication/Contacts:

- Provide a list of key contact people in the unit
- Consider assigning a mentor or buddy for the new hire
- Set up a meeting with department head and any other administrative and staff members, if appropriate.
- Officially introduce the new employee to the entire department.
- Introduce new hire to one or two people in similar jobs that can help with orientation.

- Meet with new employee at the end of the week to answer questions, inquire about their first week experience, and provide direction for the next few weeks.

Discuss department's policies and procedures:

- Attendance and punctuality
- Florida Sunshine Law
- USF Standards of Service
- USF Performance Management Process
- Budget procedures
- Dress Code
- Work Schedule
- Mail
- Internet Access
- Personal calls
- Travel
- Timesheets
- Email regulations
- Weather emergencies (Mo Bull Messenger)



Socialization/Networking

This is for the employee to gain a sense of group identity and belonging. Some networking opportunities are listed here. Find out what is available in your area and offer new employees opportunities to meet new people at USF.

- ❑ Send an email announcement to the group, department, and/or school or VP area, as appropriate, to announce the new employee's pending arrival. See the "[New Employee Announcement](#)" template for guidance.
- ❑ Coordinate welcome activities, possibly start the day by going to get a cup of coffee with the new employee, give a tour of the facility, show where the new employee will work, schedule meetings with colleagues, and lunch plans for the first day. See "[Working Location Tour](#)."
- ❑ Consider assigning a buddy to help the new employee. A buddy helps reduce uncertainty by being available to answer immediate or routine questions for the new employee. See "[Assigning a Buddy](#)."

Relationship with manager

- ❑ Clarify the why, when and how of the results the employee needs to deliver
- ❑ Explain the first assignment to the employee, using the "[A Successful First Assignment](#)" template as a guide.
- ❑ Share communication preferences. See "[Successful Communication](#)" for guidance.
- ❑ Clarify with employee the best way to work effectively with you (manager)
- ❑ Ask the employee what his or her preferred form of recognition is.

Training/Development

- ❑ Design a Learning Plan with the employee so they have access to needed information. See "[Learning Plan Development](#)" and the "[Learning Plan](#)" template.
- ❑ Review and offer formal training programs (role specific, systems specific, department specific, industry specific)
- ❑ Verify that On The Job Training is set up
- ❑ If appropriate, offer employee the opportunity to Shadow other employees
- ❑ Debrief the employee after he/she attends initial meetings, trainings, and assignments. Touching base each day, even briefly, will allow the employee to ask any questions that arise and show your support of his/her efforts. See "[Tips for Debriefing](#)."



The First Month

- ❑ Continue to clarify roles, responsibilities and expectations as needed and provide ongoing coaching and feedback. See "[Setting Smart Goals](#)."
- ❑ Schedule monthly expectations/productivity meetings as needed.
- ❑ Ensure that any mandatory or necessary training has either been completed or is scheduled to be completed. Complete Learning Plan.
- ❑ Clarify expectations and model acceptable behaviors.
- ❑ Identify skills to be mastered and resources available to accomplish learning objectives.
- ❑ Remind the employee about benefits enrollment.
- ❑ Establish goals and provide regular, informal feedback.
- ❑ Discuss with the employee how his/her performance will be formally evaluated and the timing for the evaluation.
- ❑ Schedule or oversee the scheduling of meetings with key people both internal and external to the work group or department. This includes people typically in positions or in groups where there will be a level of collaboration and/or regular interaction with the new employee.

- ❑ Continue meeting with the new employee to answer questions and follow up on training sessions and meetings that he/she attended.



Within the First Six Months

- ❑ Conduct a review meeting with your employee (after three or six months) and provide detailed feedback to employee on his/her performance. Identify performance improvement objectives. See "[The Performance Management Process](#)."
- ❑ Complete required learning (harassment, leadership skills, computer skills, systems training, etc.).
- ❑ Partner with employee to set SMART goals to meet during the coming year.
- ❑ Complete [90 day evaluation questionnaire](#)
- ❑ Ensure that any required training has been completed.
- ❑ Remind the new employee about benefits enrollment.
- ❑ Discuss information about continuing educational opportunities, special programs, and events or activities that may relate to the employee's interests and professional development.

- ❑ Continue to provide regular, informal feedback by having periodic discussions about the new hire's job assignment, productivity, and acclimation.

Between 6 and 12 Months

- ❑ Address performance, if needed
- ❑ If employee is probationary, assess performance and provide formal feedback to employee at the end of his/her 6 month probationary period.
- ❑ Encourage the employee to complete the 90 Day New Hire Survey.
- ❑ Encourage the employee to learn more about USF
- ❑ Recognize the employee's contributions by celebrating successes. This can include a congratulatory note from you or your department/school leader as appropriate.
- ❑ If a buddy was arranged, arrange a meeting with the buddy and the employee to check on how things went.
- ❑ Continue giving regular feedback to the employee. Explain when the employee can expect the first formal annual performance evaluation.
- ❑ Discuss future career development and any opportunities or plans the employee may have. Discuss professional development opportunities. This may include cross training, assigning a mentor, or taking a leadership role on a project or special team.
- ❑ To close out the onboarding process, discuss the process with the employee. Solicit specific feedback about what was useful or helpful, as well as suggestions on what he/she thought should be added to the onboarding process to help future new hires in the department.
- ❑ Ask Employee to complete and submit a self-evaluation on their performance over the last year.
- ❑ Yearly Evaluation Delivered
- ❑ Set performance goals for next year with Employee
- ❑ Identify learning and development programs that will be needed over the next 12 months. Revise Learning Plan.

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Equipment and Supply Checklist

Having the necessary equipment and supplies available on the first day of work allows a new employee to be immediately comfortable on the job. Requests for computer and phone equipment and services should be done prior to the new employee's first day.

	<p>Keys/Codes</p> <ul style="list-style-type: none"> <input type="checkbox"/> Building <input type="checkbox"/> Cabinet/desks <input type="checkbox"/> Printer <input type="checkbox"/> Codes for copy machines <input type="checkbox"/> Fax Machine <input type="checkbox"/> Office <input type="checkbox"/> Voicemail <input type="checkbox"/> Other as needed: _____ <input type="checkbox"/> Other as needed: _____
	<p>Desk/Office Supplies</p> <ul style="list-style-type: none"> <input type="checkbox"/> Calendar <input type="checkbox"/> Stapler <input type="checkbox"/> Paper Clips <input type="checkbox"/> Pens/pencils <input type="checkbox"/> Tape dispenser <input type="checkbox"/> Business Cards (if applicable) <input type="checkbox"/> Other as needed: _____ <input type="checkbox"/> Other as needed: _____
	<p>Access Make sure new staff member is added to appropriate e-mail lists and calendaring systems (if applicable).</p> <ul style="list-style-type: none"> <input type="checkbox"/> Specify system (as needed) _____ <input type="checkbox"/> Specify system (as needed) _____ <input type="checkbox"/> Specify system (as needed) _____
	<p>Procedural Directions</p> <ul style="list-style-type: none"> <input type="checkbox"/> Phone directory of the department and other useful contacts <input type="checkbox"/> How to request equipment, repairs and supplies <input type="checkbox"/> Other as needed: _____ <input type="checkbox"/> Other as needed: _____ <input type="checkbox"/> Other as needed: _____

Email Announcement

Send an email announcement to the group, department, and/or school or VP area, as appropriate, to announce the new employee's pending arrival.

New Employee E-Mail Announcement

To [staff in new employee's work area/department]:

I'm very pleased to announce that [new employee] will be joining us as [job title] on [start date]. [New employee] will be responsible for [insert information about what he/she will be doing].

[New employee] has recently [information about recent relevant employment background].

Please come to [location of welcome gathering] on [date] to meet [new employee] and welcome [him/her] to our team!

You can reach [new employee] at:

- [work address/office location]
- [phone number]
- [email address]

Thank you,

[Name of Supervisor]

Working Location Tour

Providing a tour of the new employee's work area can prevent him/her from being or feeling lost or confused during the first week. Orientation to the physical environment can be accomplished on the first day of employment.

A tour of the employee's work location might include:

- Restrooms
- Break/lunch rooms
- Kitchen, including any department procedures
- Vending machines
- Supply room, including any department procedures
- Emergency and first aid supplies
- Photocopy and fax machine, including instructions on use
- Mail Centers
- Transportation services and stops
- Emergency Evacuation/Plans
- Other department locations on campus the employee may frequently interact with
- _____
- _____
- _____

Assigning a Buddy

A new employee's orientation is greatly enhanced by setting up a buddy for the employee. A buddy is not a substitute for a supervisor, but is someone who can provide guidance and answer the new employee's questions about the work environment and the workplace culture in a positive and encouraging way. A buddy can relate new employee information to actual situations.

How to Structure a Buddy Assignment

A buddy should build rapport with the new employee by meeting face-to-face and answering questions by email, phone or instant messenger within a reasonable amount of time. It is encouraged for buddies to meet face-to-face for a minimum of 30 minutes each week for an established time period; however, support can go beyond the defined time period if appropriate and useful.

What Makes a Successful Buddy

To be a buddy, an employee must understand the culture, have good interpersonal skills, and want to help. Below is a list of other qualities to consider when looking for a buddy:

- Can be given the time to be accessible to the employee
- Holds a job similar to that of the new employee (i.e. peer)
- Possesses a full understanding of the work environment (minimum length of service of six months or a year)
- Has a good performance record
- Is well regarded by peers
- Has good communication and interpersonal skills
- Has patience and is empathetic
- Has a positive attitude
- Possesses a strong sense of confidentiality

The Responsibilities of a Buddy

A buddy should provide as much concise information as possible to help the new employee feel comfortable in his/her work environment. The buddy should be a resource to the new employee on work rules, workplace culture and norms, and unwritten policies and procedures. Below is a list of other responsibilities of a buddy:

- Helping socialize the new employee with peers, joining for lunch, etc.
- Identifying resources and provide a tour of the workplace
- Instilling a sense of belonging
- Reporting any serious issues/concerns to the manager/supervisor or Human Resources
- Answering questions and referring the new employee to the appropriate resource

Schedule for the First Day

While it is important to not overwhelm the new employee with too much information, there are key areas that should be covered on the first day. The new employee should be able to navigate the immediate physical environment, use basic communication and work equipment and know what to expect next. Many first day activities will be influenced by the job itself; however, below is a list of structured activities that most new employees will benefit from. When creating a schedule for a new hire's first day, keep in mind that although most new employees prefer not to be left with nothing to do, they generally appreciate some "down" time to explore their work space and review information they've received.

Morning

- Greet the employee, introduce him/her to the work space, including where personal items are kept (coat rack, locker)
- Provide facilities access information, security information, keys and parking permit
- Answer any immediate questions the employee may have
- Introduce employee to co-workers (and buddy if assigned)
- Provide a tour of the immediate facilities (give personally, or assign a buddy)
- Give employee some time to get acquainted with his or her work space

Lunch

- Prearrange plans for lunch with you and/or others, if feasible.

Afternoon

- Schedule time for employee to establish computer systems
- Arrange for employee to receive instructions and codes for photocopier, fax, and other machinery he or she will use
- Go over any pertinent office policies and procedures (office hours, lunches and break times, phone coverage, etc.)
- Allow time for the employee to settle in and review all the information provided to him/her throughout the day
- Meet with the employee to debrief the day, answer any pending questions, and provide and explain the schedule and activities for the next several days

A Successful First Assignment

The first assignment is important for two reasons: it can give the employee a successful start in the new position, and it can help establish productive interaction and communication between the employee and his/her supervisor.

Explain the expected outcome(s) of the assignment.

- What will be the end result of the assignment? Will it be newly created or updated/changed?
- What will the outcome look like? (Provide examples, if possible.)
- How will success be measured?

Clarify the importance of the outcome(s). This will help the employee connect the assignment to the overall organization.

- Where do the results fit in the larger organizational picture? (Consider missions, goals and priorities). This will help the employee understand the impact the job has on the organization.
- Who will benefit from the results? (Students, staff, faculty, external stakeholders, etc.)

Describe the key features of the assignment.

- What actions or steps are required?
- What resources or resource limitations may apply?
- What are the deadlines? Will there be milestones to meet prior to the final deadline?
- What is the priority of the assignment for the employee?
- How will progress be monitored?

Define the level of authority the employee will exercise throughout the assignment.

- Should the employee carry out exact instructions?
- Should the employee bring recommendations to be decided on by the manager?
- What recommendations should the manager and new hire decide on together?
- Will the new employee have the authority to make decisions, but should inform management before acting?
- Will the new employee have the authority to make decisions, act, and then inform management of the outcome?

A Successful First Assignment

(Continued)

Let the employee know who else will be involved in the assignment.

- Who can influence success?
- Who will the employee need to consult with? (Ensure that the employee knows how to contact this/these employee(s).)
- Who will the employee need to get resources from, if needed?

Identify potential issues and how they will be addressed.

- What could possibly interrupt or stand in the way of success?

Remember to check with the employee throughout the discussion of the assignment to ensure that clear expectations are established; encourage questions. Clarify what management will do to support the employee's success. It is always recommended that the manager debrief with the new employee following the completion of the first assignment to gain his/her perspective on the assignment. During this conversation the manager can discuss the outcome of the assignment, what challenges he/she faced, how his/her interaction with other employees went and what could have been done differently.

Successful Communication

When supervisors and employees communicate effectively, it can help establish an environment of trust and respect, and optimize productivity and quality. The pattern of communication between a manager and a new employee start before his/her first day on the job. Discussing each other's communication preferences early on can add clarity to formal and informal exchanges.

Let the employee know your preferred means of communication. Today, with the many different work place arrangements, different methods of communication can be more effective (face-to-face, phone call, email, instant messenger).

- Do you generally prefer to talk in order to understand, read in order to understand, or do you have another preference? How does this preference influence how and when you choose to receive information?

Set the expectation for communication with the employee.

- Will you be scheduling one-on-one meetings? How often will these meetings occur - weekly, monthly, quarterly? Individual meetings can improve morale by helping a new employee realize he/she is heard and valued. Good morale generates a positive work environment. Use one-on-one sessions to inquire about the new employee's goals, skills and interests.
- Do you have an open door policy in your department? This communication style works well when the supervisor is truly able to accommodate "drop in" interruptions and is willing to give the employee his/her full attention.
- If the employee has an issue that he/she would like to discuss, how would you like to handle this?
- If a new employee has an idea for changing or improving something, how can he/she introduce the idea to you most effectively? Would you prefer an initial question, an emerging idea, or a well thought out plan?

Clarify any insider language used in the workplace.

- Are there any commonly used acronyms and/or abbreviations the employee should be aware of?

Discuss the new employee's communication preferences, and consider how you can work with him/her most effectively.

Talking Points/ Debriefing

Talking Points on Debriefing Meetings/Orientation/Training Sessions

When an employee starts a new job, the amount of names, places, and other information can be overwhelming. Debriefing with the employee gives supervisors the opportunity to clarify information and answer any subsequent questions that may have resulted from a meeting, orientation, or training session.

After an initial meeting with department/work group employees, ask the new employee:

- Who did you meet with? Explain what this person's role is in the organization (organizational chart), and how you see this position's interaction with the new employee's position.
- What topics did you discuss? Does he/she have any questions regarding the information that was covered in the meeting?
- Discuss how this person can be a resource to the new employee (e.g. subject matter expert, authorizer, departmental asset manager).

After New Staff/Faculty Orientation, ask the new employee:

Not all new employees may feel comfortable asking questions at orientation so it's important to inquire about any additional questions the new employee may have afterward.

- What did you learn about the University at orientation?
- Do you have additional questions regarding any of the topics covered in orientation (e.g. the university's mission and values, benefits)?
- If not already discussed, tell the new employee how the university's mission and values apply to your department/work group as well as the new employee's position.

After a training session, ask the new employee:

- What was the topic of the training?
- What new/important information did you take away from the training?
- What information did you find helpful or applicable?
- What did you learn during the session that you anticipate using in your work? (discuss how the training benefits the employee in his/her new role)
- Was there any information you did not understand or was not clear?

Standards of Service

Service plays a critical role in everything we do at the University of South Florida.

All who work at this university are committed to providing quality service in all we do. We commit to serve others and place the needs of others before our own personal needs. Our philosophy of service pertains to students and fellow workers alike. We hold as self-evident that a service does not exist until it is offered. We appreciate that our student body and workforce are diverse and that our diversity gives us strength and adds value to our university. We appreciate the powerful nature of written and spoken communication and understand that how we communicate with students and one another has a direct impact on the quality of the individual experience at USF. We also realize that each of us serves as an ambassador of this institution and that our attitude and actions reflect on us as individuals, and on USF. We are committed to support the University's strategic plan by providing the very best service we can.

The University of South Florida is dedicated to the following goals and ideals:

- We will treat students, visitors and fellow workers with dignity and respect and assist them in a caring and helpful manner.
- We will act in a manner that students, visitors and fellow workers see us as a source of accurate and helpful information.
- We will continually review our policies and procedures in an effort to simplify them and improve service.
- We will continue to improve and update our knowledge, skills and abilities in order to best serve our students.
- We will derive pride and satisfaction from solving problems, not passing them on, as we seek solutions not blame.

In support of these goals and ideals, the following standards of service are established:

1. We will acknowledge an inquiry as quickly as possible within the service levels established for individual units. The goal is to acknowledge internal responses within one business day to currently enrolled students who inquire about an issue. We will respond within three business days on inquiries from prospective students.
2. We will make the point of conflict the point of resolution. If a student brings an issue to a staff member, that staff member will assist the student with arriving at a resolution.
3. We will listen to our students and fellow workers and our communications will be clear and understandable.
4. We will identify opportunities to simplify systems and processes in ways that benefit both internal and external stakeholders.
5. We will give the student the benefit of the doubt.
6. We will set the conditions so that students and visitors who interact with any University departments feel welcome, relaxed and comfortable.

Setting SMART Goals

SMART goals

S-Specific- When setting goals, be specific as to what the goal is, saying “I want you to improve” is vague and confusing to the listener. The area and method of improving must be specifically defined.

M-Measurable- An important thing to remember is, “If you can’t measure it, you can’t manage it.” Therefore, the goals have to be observable and measurable. If somebody says, “That leaves my job out-you can’t measure my job,” offer to eliminate it to see if it will be missed.

A-Ambitious/attainable- People like to be able to reach their goals and stretch themselves in the process. High achievers like to set moderately difficult but obtainable goals: that is, goals that stretch the individual.

R-Reachable/relevant- Is the goal feasible given the employee’s skill and the organization’s resources.

T-Timebound and trackable- Remember to be specific as to when you require check-ins and completion on the goal. It is to your advantage to set interim goals so that people’s progress can be praised along the way. If a goal consists of completing a report by June 1, the chances of receiving an acceptable report will increase if interim reports are required. Remember, good performance is a journey, not a destination. The goal is the destination. What managers have to do is manage the journey.

Example 90 Day Questionnaire

Solicit specific feedback about what was useful or helpful, as well as suggestions on what he/she thought should be added to the onboarding process to help future new hires in the department.

Example of a 90 day questionnaire:

- 1) How is your job?
- 2) Is it what you expected when hired?
- 3) Any surprises? If yes, what...
- 4) Do you have all the work tools you need?
- 5) What was the most positive part of your new hire experience here at USF?
- 6) In your opinion, have you received adequate training and resources to do your job effectively? If not, please give suggestions on what else you need.

Learning Plan Development

Staff development is critical for employee and University growth. Planning for development with one's supervisor is essential in identifying the knowledge and skills necessary to achieve department and organization objectives.

Create a learning Plan

The individual learning plan will identify the areas you most want to develop and the most effective methods to acquire skills and improve performance.

1. Make a list of developmental needs and review with your supervisor. For example
 - I want to speak up more in meetings and make a contribution in problem solving and in expressing what I need to accomplish my goals
 - I want to be more confident in my presentation abilities in small groups or when presenting status reports to my manager and to clients.
 - I need to build a more productive relationship with a coworker that I usually disagree with.
 - I need to learn the latest upgrades to the current business systems. I need skills in the areas of budgeting and IT
 - I am becoming more responsible for several administrative processes in our area. I could use better skills in improving the flow of paper through our department.
2. Develop learning objectives based on your developmental needs
 - Demonstrate the ability to use effective communication skills in staff meetings, and in gaining cooperation with peers.
 - Successfully contribute to group problem solving by applying a more effective methods of analyzing root causes and generating solutions.
 - Apply skills in active listening and resolving disagreements in productive manners.
 - Increase efficiency in assembling information for displaying data for regular reports available in the business system
 - Demonstrate skills in administrative processes
3. Consider the variety if resources and actions available to accomplish learning objectives. These include:

Learning Plan Development

(Continued)

Assignments

- A project with senior levels
- Job scope increase or change
- Start-up project
- Key presentation
- Represent manager
- Benchmarking other companies
- Fix-it project
- Project team leader

Coaching

- Specific ongoing behavioral coaching
- Practice presentation
- Watch role models
- Refer them to other colleagues as advisers
- Schedule follow-up meetings

Education

- Courses
- Self-study
- Books
- Periodicals
- Videos
- Audios
- Computer Based
- Professional associations

4. Set a time frame within which to achieve each learning objective.
5. Criteria for Success – How will you know when you have achieved your goal? How would you like to evaluate your success? For example:
 - I will make a clear presentation that gains the support and cooperation of my peers.
 - I will contribute to the successful implementation of solutions that improve outcomes in agreed areas.
 - I will appreciate the positive contributions individuals make and implement strategies to reduce distractions and minor annoyances in the work environment.
 - I will come back from functional training programs and implement the appropriate number of strategies to improve performance.
6. List the persons who will serve as a resource to observe and give you feedback on your development.
7. Learning Plan Review – Establish quarterly meeting dates and record results and agreements as a result of the meetings.

Learning Plan

Name:		Area:
Date:	Name of Supervisor:	

Learning Objective:		
Actions	Target Date	Date Completed
1.		
2.		
3.		
Criteria for Success:		

Learning Objective:		
Actions	Target Date	Date Completed
4.		
5.		
6.		
Criteria for Success:		

Learning Objective:		
Actions	Target Date	Date Completed
7.		

8.		
9.		
Criteria for Success:		

People who will observe you and give feedback:

Learning Plan Review: _____ % of activities completed as of: _____ (date)

Quarterly Review Meetings

Meeting	Date	Notes
1		
2		
3		
4		

Signature: _____ Date: _____

Manager's Signature: _____ Date: _____

The Performance Management Process

The performance management process provides a vehicle through which employees and their supervisors collaborate to enhance work results and satisfaction. This process is most effective when both the employee and the supervisor take an active role and work together to accomplish the following:

1. **Performance planning:** Plan for the coming year in the following areas:

Clarify the expectations and standards for the job

- *what's expected of someone in this role*
- *what standards must be maintained*

Set performance goals

- *what will the employee strive to achieve in the coming year*

Set development goals

- *what knowledge/skills will the employee work to develop or enhance in the coming year*

2. **Day-to-day coaching and feedback:** Discuss performance on a regular basis (not just during formal reviews). Share feedback about the employee's successes and areas needing improvement. Seek employee input about the work process and results.

3. **Quarterly Performance Check-in:** Have a "progress check" conversation at least once per quarter. Identify successes and needed improvements in each of the following areas:

- Meeting expectations and standards
- Achieving performance goals
- Achieving development goals

4. **Formal performance review:** Meet annually to review feedback from the previous year, document performance outcomes and development results, and plan for the coming year.