



OKLAHOMA CITY  
COMMUNITY COLLEGE

# PHASE 1: INSTRUCTIONS FOR THE INITIAL PLANNING MEETING

## An Informative Guide for Staff Members and Supervisors

Supervisors will schedule a meeting with Staff members before October 31 to discuss applicable Core Competencies and to write and/or finalize the Staff member's SMART goal(s) for the year. The single required SMART goal may be written by the Staff member prior to the meeting with their supervisor, or it can be written during the meeting with input from the supervisor. At the end of the meeting, both participants will need to denote completion of the phase using their initials, prior to submission.

### Helpful Tips

- The supervisor should have a copy of the most recently updated job description available when writing goals and discussing anything performance related. Discuss duties with employee and consider if any changes to the job description are necessary.
- The supervisor should take this opportunity to coach the employees and discuss employee strengths, upcoming projects, team values, department goals, professional development, and listen to the employee when developing SMART goals.
- The supervisor will need the Staff member's Employee ID for the meeting.
- Only one SMART goal is required for each Staff member, but as many as five goals can be written by the Staff member, the supervisor, or both combined, during the initial planning meeting.
- At the conclusion of the meeting, the supervisor will enter all the information discussed and agreed upon, in the system (using this [link](#)). *\*The system times out after 70 minutes.*
- First and last initials for the supervisor and the Staff member must be entered on the form prior to submission (simply denotes that the two have met, discussed, and agreed upon what has been entered). This can be done using either of the two options below:
  - Supervisor and Staff member can each use the supervisor's mouse to enter their own initials
  - Supervisor can enter initials for both
- Once submitted, an email from [appraisal\\_no-reply@occc.edu](mailto:appraisal_no-reply@occc.edu) is sent to both the supervisor and the Staff member. At this point, a rule should be set up in Outlook. This will ensure that all related messages are saved in the same location for future use. (Use the [P1-Setting Up A Rule In Outlook](#) document for detailed instructions.)
- Once the form is submitted, it cannot be edited.