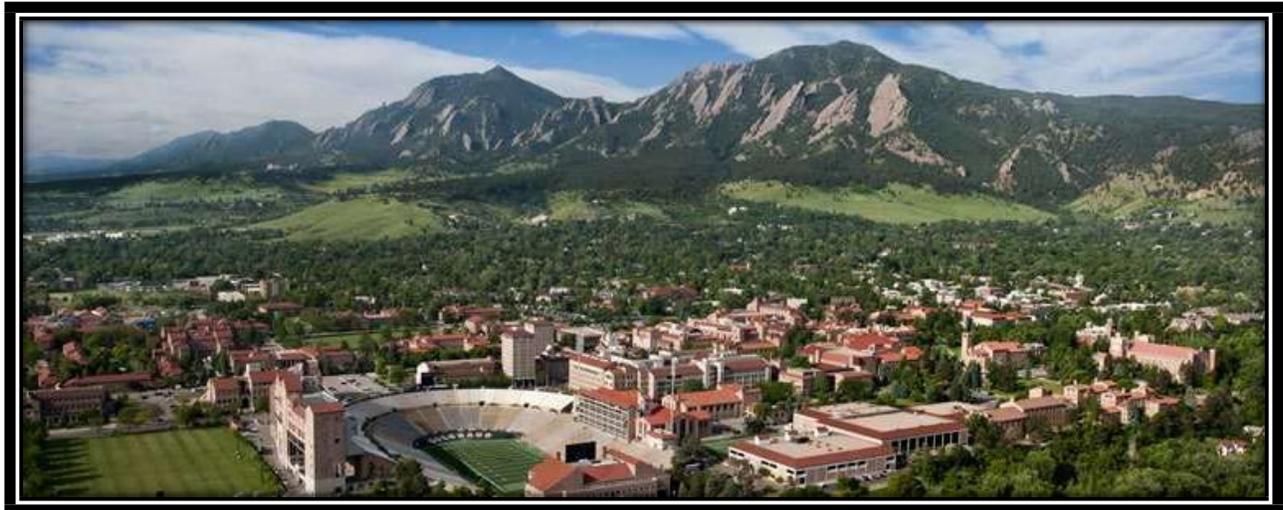


Cornerstone for Performance Management User Guide Series:

Performance Planning for Supervisors of University Staff

Guide 1 of 3



Performance Management for Managers

Introduction

The University of Colorado Boulder is excited to offer a new online performance management solution (Cornerstone) to better support our collective efforts toward improving talent management on campus.

The specific goals of this tool are to:

- Alleviate the administrative burden of our existing and varied performance management processes
- Better align work occurring across campus in support of specific unit goals and the Chancellor's Strategic Imperatives
- Introduce campus competencies more broadly to demonstrate the importance that work be accomplished in a manner that is consistent with University values and the Colorado Creed
- Facilitate more frequent and meaningful conversations between employees and managers as they relate to goal alignment, performance, and employee development
- Better calibrate how different performance ratings are utilized across campus to ensure they are assigned fairly and equitably

As a supervisor, you hold the key to realizing the promise of this new approach to performance management and to the effective use of this new and powerful tool.

Purpose of This User Guide Series

This user guide series is intended to walk you through the first of three steps in Performance Management. The focus of this particular guide is: **Performance Planning**.

Tasks for the mid-year review (coaching session) and end of year evaluation will be launched later in the year, and will be accompanied by additional user guides and training.

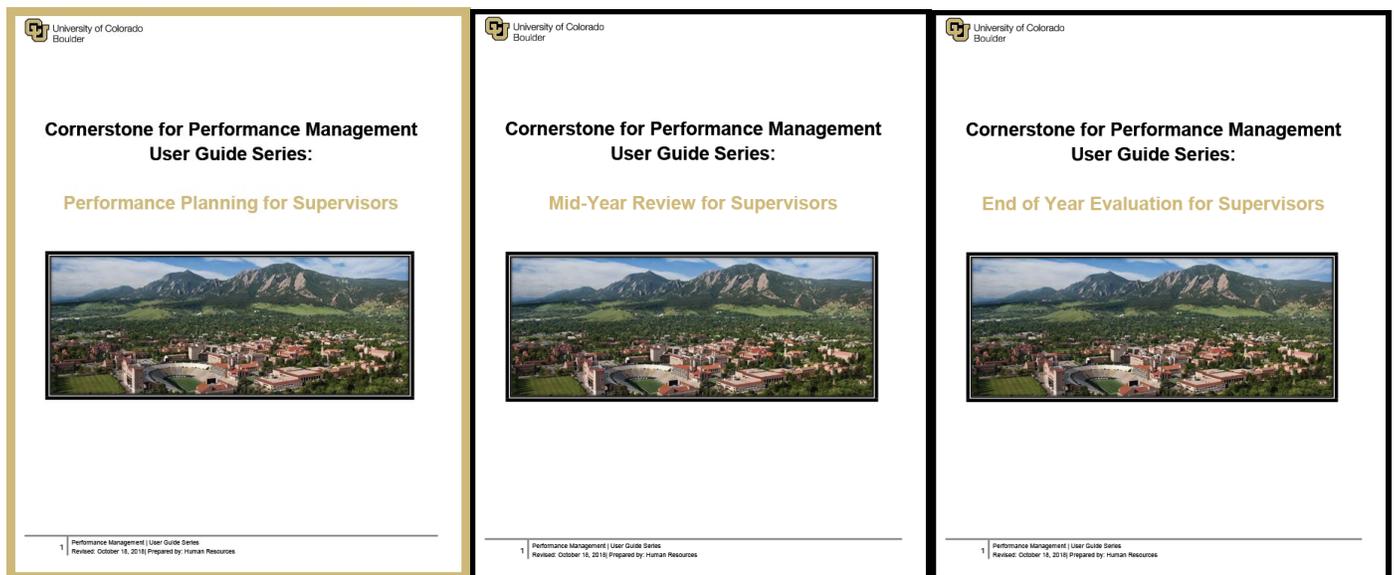


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Resources

In addition to this user guide, many tools and resources are available to assist you and your teams through the implementation of Cornerstone. You can find all of those tools as well as contact information for Employee Relations staff here:

www.colorado.edu/hr/cornerstone

Important Definitions

Alignment: The critical ability for every individual within the University, no matter their role, to understand how their work supports and connects (aligns) to the short and long-term objectives of the University.

Performance Management: The year-long process through which managers and employees work together to establish expectations and provide ongoing feedback regarding those expectations. The process consists of three steps: 1) Performance planning 2) Mid-year review-coaching and 3) End-of-year evaluation.

Goals: Observable and measurable future results to be achieved within a reasonably specific timeframe. CU Boulder employees should plan and execute 1-3 team or individual goals during a given performance period.

Job Duties: The general tasks and day-to-day operational responsibilities of a given role, the work generally outlined in a position description. While goals tend to be specific projects to be delivered during specific time frames, job duties remain fairly constant for a given position over time.

Competencies: The skills and behaviors employees develop and demonstrate to execute their goals and job duties. While goals and job duties articulate “what” is to be done, competencies provide guidelines for “how” that work gets done.

Getting Started with Performance Planning

Establishing employee performance plans is a key supervisory responsibility. Effectively setting individual employee goals and job duties and closely tying them to the University's overall Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their manager that is focused on using feedback as a professional tool.

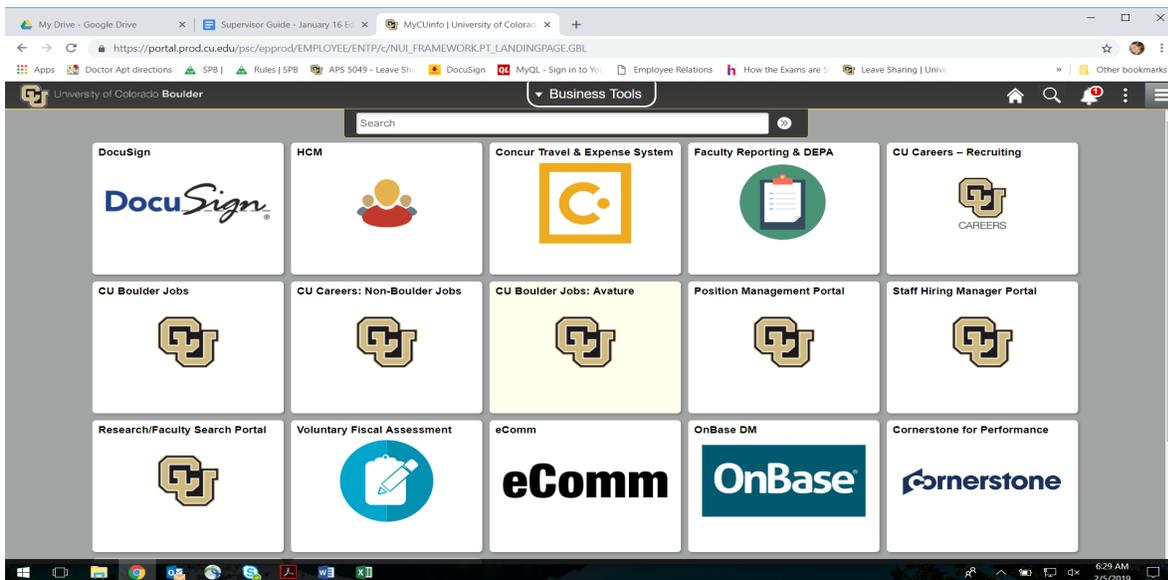
At the beginning of each performance management cycle, supervisors are tasked with developing performance plans for their employees. While plans should be created within Cornerstone, using such tools as the SMART goal wizard and alignment capability, they must be discussed with the employee through an in-person dialogue. If you have not established a plan for your employees in Cornerstone, please do so before completing the Performance Planning Checklist task outlined in this user guide.

The performance plans created within Cornerstone serve as a fluid representation of the employees responsibilities during the performance cycle. They can and should be edited throughout the plan cycle based on the changing needs of the employee and department. These plans, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone at the end of the plan year.

Login to Cornerstone

The Cornerstone for Performance Management portal is available via the MyCUinfo portal:

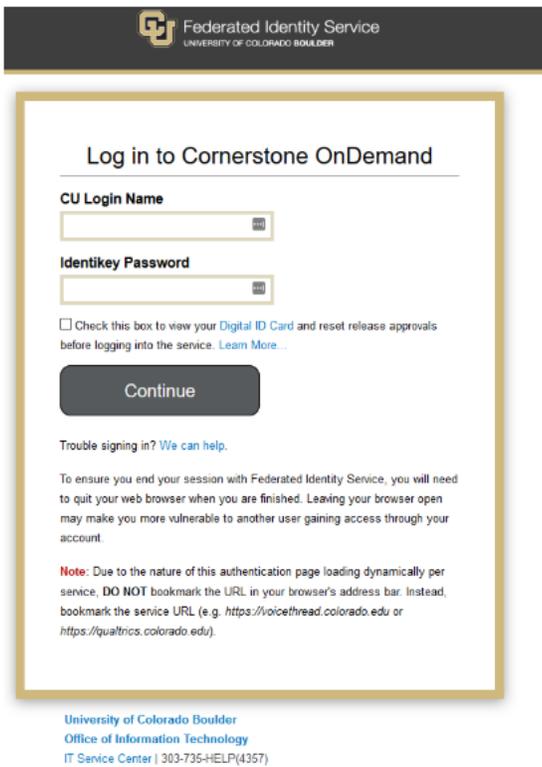
1. Log into [MyCUinfo](#) with your IdentiKey
2. Select CU Resources in the NavBar
3. Select Business Tools
4. Select the Cornerstone tile



If the MyCUinfo portal is down, you can also access Cornerstone through the following link:

<https://colorado.csod.com/samldefault.aspx>

Login to Cornerstone using your CU Boulder IdentiKey and password:



The screenshot shows the login interface for the Federated Identity Service at the University of Colorado Boulder. At the top, there is a dark header with the CU Boulder logo and the text "Federated Identity Service UNIVERSITY OF COLORADO BOULDER". Below this is a white box with a gold border containing the login form. The form is titled "Log in to Cornerstone OnDemand" and includes two input fields: "CU Login Name" and "Identikey Password", both with eye icons for toggling visibility. A checkbox below the fields is labeled "Check this box to view your Digital ID Card and reset release approvals before logging into the service. Learn More...". A dark "Continue" button is positioned below the checkbox. At the bottom of the white box, there is a link "Trouble signing in? We can help." and a paragraph of text: "To ensure you end your session with Federated Identity Service, you will need to quit your web browser when you are finished. Leaving your browser open may make you more vulnerable to another user gaining access through your account." A red "Note" follows: "Due to the nature of this authentication page loading dynamically per service, DO NOT bookmark the URL in your browser's address bar. Instead, bookmark the service URL (e.g. https://voicethread.colorado.edu or https://qualtrics.colorado.edu)." Below the white box, the footer text reads: "University of Colorado Boulder Office of Information Technology IT Service Center | 303-735-HELP(4357)".

Home Page Review

1. Upon logging in you will land on the Cornerstone **Home Page**.
2. Review all tiles for important details regarding performance management philosophy, the performance evaluation process and timeline, and performance tasks that require your review and completion.
3. Please note the link to the University's Strategic Imperatives. This will direct you to the Chancellor's Strategic Plan and give robust definitions of the Colorado Creed, and the Chancellor's Strategic Imperatives.
4. Additionally, please return here at any time to provide feedback to the implementation team on your experience using Cornerstone or to submit a "ServiceNow" ticket if you need help.

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
- Establishing clear expectations between employees and supervisors around work, professional development, and career growth opportunities
- Reinforcing organizational values

Effectively setting and reviewing individual employee expectations and closely tying them to the University's Strategic Imperatives not only enhances performance in an effective and efficient way, but also builds a collaborative relationship between an employee and their supervisor that is focused on using feedback as a professional tool.



My Performance Plan



My Profile

Performance Evaluation Process

What can I expect this year?

The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:

You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).

April-July:

You and your supervisor will occasionally check-in with each other to review plan progress, providing & collecting feedback through in person, two-way dialogue.

October:

You and your supervisor will formally check-in for the mid-year coaching task, within Cornerstone, and review your progress towards your plan. Updates and comments should be made within Cornerstone during this formal check-in.

January:

You will be asked to review the progress that you made towards your plan over the past year and will have the option to comment. Your supervisor will be asked to do the same, and a final performance evaluation and rating will be assigned.

My Inbox

No Items

My Tasks

	Due Date
Performance Planning Checklist for Chip Buffalo	2/6/2019

Ask Questions and Provide Cornerstone Feedback

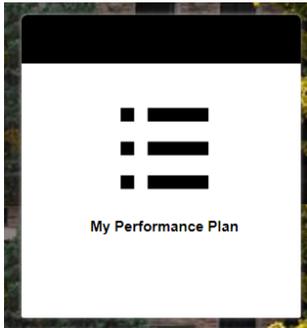
The use of Cornerstone for performance management is new to CU Boulder, therefore, we request that you share your thoughts regarding your experiences with this solution. We will use your feedback to evolve our configuration of Cornerstone to ensure it is meeting the ongoing needs of our campus.

To provide feedback or request assistance with the Cornerstone tool, please fill out the [Cornerstone Help Form](#).

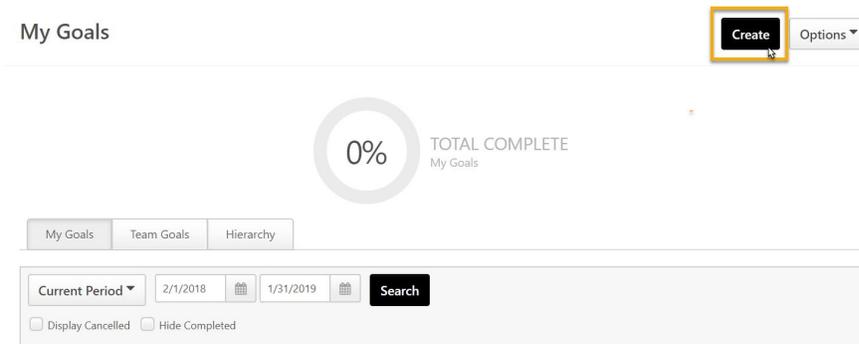


Create Performance Plans

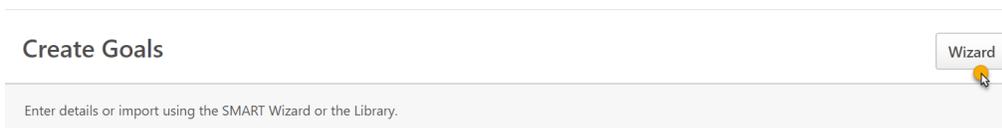
1. Click on the “My Performance Plan” icon located in the upper-right corner of the **Home Page**.



2. To add goals, job duties, and competencies to the plan, click **Create** on the top right of the screen.



3. If you would like to be walked through writing SMART goals, you can click **Wizard** on the top right-hand corner of this page.



4. Enter the title and description for your goal, job duty, or competency.

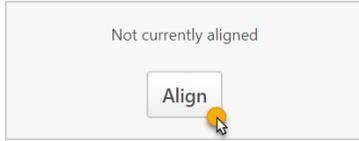
Title *

Description

B I U S I_x |   |   | 

*** If applicable, align your goals with higher-order departmental goals by clicking the **Align** button.

Alignment



5. Enter **Start Date** and **Due Date** for your goal. The start and due dates must fall within the performance cycle period. The performance cycle dates will automatically default in these fields.

Note: If you are a university staff member you must update these dates to reflect the classified performance cycle if creating goals for a classified employee.

Start Date **Due Date ***

2/1/2018 1/31/2019

6. For **Type** please select whether this is a “Goal” “Job Duty” or “Competency.”

Type *

Select ▾

- ✓ Select
- Competency
- Goals
- Job Duties

7. Select at least one **University Imperative** that best embodies your goal, job duty, or competency. If none of the imperatives makes sense, select “Other.”

University Imperative *

Select options ▾

- Select All
- *Be the Top University for Innovation
- *Positively Impact Humanity
- *Shape Tomorrow's Leaders
- Other

8. Add specific milestones for your goals under the **Tasks and Targets** section if applicable.

Tasks and Targets



Add Tasks or Targets

Description

Start Date * Due Date *

2/1/2018 1/31/2019

Include Target

Type Start Value Target

Currency Start Value Target

Cancel Done

9. Attach any documents that support the goal, job duty, or competency.

Attachments



Upload up to 3 attachments. Maximum upload 1mb

10. Select the **Visibility** box if you would like others to be able to align to this goal, either internal or external to your department.

WARNING: Selecting this box allows anyone on campus to see and align to this goal.

Visibility

Allow other users to see and align

11. Assign the goal to members of your team by selecting the **"Your team"** radio button and checking the box for the employees you wish to assign the goal to. *Note: You may also assign the goal to each employee's direct and indirect reports by selecting the box in the right-hand column.*

Assignment *

Select which users or OU?s this goal should be assigned to.

Yourself Your team

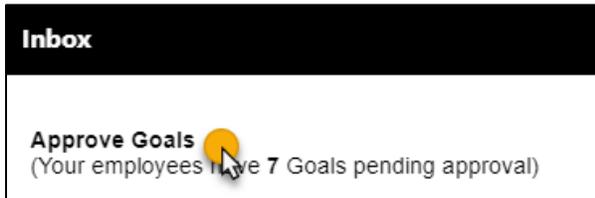
<input type="checkbox"/>	Name	Title	Direct and Indirect Reports <input type="checkbox"/>
<input type="checkbox"/>	 Harry Potter	HR Asst Dir	
<input type="checkbox"/>	 Draco Malfoy	HR Program Mgr	<input type="checkbox"/>
<input type="checkbox"/>	 Hermione Granger	HR Program Mgr	
<input type="checkbox"/>	 Ron Weasley	HR Manager	<input type="checkbox"/>
<input type="checkbox"/>	 Dobby, the Elf	HR Professional	

12. Once you have finalized the goal, job duty, or competency click **Submit**. The work will be assigned to all members of your team selected in the “Assignment” section. You also have the option to save the goal as a draft without submitting.

Approving Goals Created by Employees

Each of your direct reports will have access to create personal goals for their performance within Cornerstone. This process works in the same way as supervisor goal creation with the exception that goals require supervisor approval. Supervisors can see goals that are awaiting approval in the **Inbox**.

1. To access goals for approval, click on the **Approve Goals** link in the **Inbox** tile on your home page.



2. Goals that are pending approval from all of your direct reports will display in your **Inbox** and can be accessed via the **Approve/Deny** link on the far right. This link opens an editable version of the goal.

Pending Goals

You may individually view the details of each Goals to approve or deny the Goals or you may select a group of Goals to approve or deny all at once.



3. Review the goal and make any necessary changes before clicking **Approve** at the bottom of the screen.



4. You may cancel a goal by clicking **Cancel** which removes this from your employee's goals for the year.
5. You may deny goal changes by clicking **Deny**. Please note if a goal is denied, the employee does not get a notification and should be notified if there is a need to resubmit a goal that has been denied.

Completing Tasks in Cornerstone

Employee Performance Planning Task: This task contains a checklist of items to review once initial planning has been completed for the plan year. Prior to completing the Employee Performance Planning task, create goals, job duties, and competencies for your team as outlined above.

Completing the Goal Planning Task

1. In the **"My Tasks"** tile on your Home Page, click on "Performance Planning Checklist" for each of your direct reports. Note: Only 10 tasks will display. To access all tasks, navigate to the "hamburger" menu on the top right corner of the Home Page.

You are currently logged in as Ralphie Buffalo

Welcome, Ralphie!

To the University of Colorado Boulder's new Performance Management Solution.

Why Performance Management Matters

Effective performance management processes like the one in place at CU Boulder can help organizations and individuals achieve excellence by:

- Aligning work and resources to clearly defined institutional aspirations and imperatives
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Performance Evaluation Process

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The entire performance management process will consist of:

1. An initial planning exercise
2. A formal coaching check-in between supervisors and employees to review plan progress
3. Recommended quarterly check-in coaching sessions
4. A final performance evaluation

February-March:

You and your supervisor will work together to define expectations aligned with the [University's Strategic Imperatives](#).



My Performance Plan



My Profile

My Inbox

No Items

My Tasks

	Due Date
Performance Planning Checklist for Chip Buffalo	2/6/2019

- After opening the task for a given employee, review the task steps on the left-hand side of the screen and read the “Overview” to become familiar with the steps in the planning process and why they matter.

The screenshot shows the user interface for performance planning. At the top, the University of Colorado Boulder logo and name are visible. Below the header, it states 'You are currently logged in as Ralphie Buffalo'. The main content area is titled 'JAN.16 TEST-CHIP 2019 - 2020 University Staff Performance Planning' and includes an 'Options' dropdown. A profile card for 'Chip Buffalo', Academic Services Manager, is shown with a 0% progress indicator. A sidebar on the left contains navigation links: 'Overview' (selected), 'Supervisor Goal Planni...', and 'Supervisor Sign-Off'. The 'Overview' section contains text explaining the purpose of performance planning and the 'Review Step Progression' section shows a checklist with 'Supervisor Review' (due 2/6/2019) and 'Employee Acknowledgment'. A 'Get Started' button is located at the bottom right of the main content area.

- Click **Get Started** to move on to the next step in the task and begin the checklist.

Get Started

- Note: If you have not built goals for your employees in Cornerstone, please do so before continuing to the next step in the Checklist task.
- Review the Supervisor Planning Checklist and use the checkboxes to indicate completion of the planning tasks.

You are currently logged in as Ralphie Buffalo

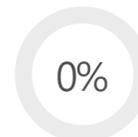
- Overview
- Supervisor Goal Planni...
- Supervisor Sign-Off

JAN.16 TEST-CHIP 2019 - 2020 University Staff Performance Planning

Options ▾



Chip Buffalo
Academic Services Manager
2/1/2018 - 1/31/2019



Supervisor Goal Planning Checklist

If you have not reviewed and created a performance plan in Cornerstone and discussed it with Chip Buffalo, please do so before completing this checklist.

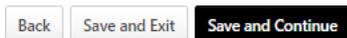
Please note that the performance plan can and should be edited and updated throughout the plan cycle.

<p>Consider alignment of the Performance Plan with the supervisor/department objectives</p> <p><input type="checkbox"/></p> <p>*</p>
<p>Create goals, job duties, and competencies for the employee's Performance Plan</p> <p><input type="checkbox"/></p> <p>*</p>
<p>Meet with your employee to discuss their Performance Plan</p> <p><input type="checkbox"/></p> <p>*</p>

Back Save and Exit **Save and Continue**



6. If you have not completed goal planning or met with your employee to discuss their performance plan, you may click **Back** or **Save and Exit** to exit the checklist task.
7. If you have completed all items on the checklist, click **Save and Continue** to move on to the next step.



8. Enter your first and last name and click **Sign** for the Supervisor Sign-Off.

University of Colorado Boulder

You are currently logged in as Ralphie Buffalo

JAN.16 TEST-CHIP 2019 - 2020 University Staff Performance Planning

Options ▾

Overview
Supervisor Goal Planni...
Supervisor Sign-Off

 **Chip Buffalo**
Academic Services Manager
2/1/2018 - 1/31/2019

50%

Supervisor Sign-Off

Please provide an e-signature to confirm.

Supervisor

Sign

Back Save and Exit Submit

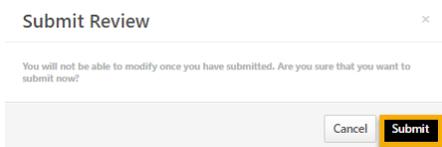
Cornerstone

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- If you are ready to submit the checklist and route it to your employee for completion, click **Submit**.
- You may also click **Save and Exit** if you are not ready to route to your employee.



- Click **Submit** in the popup window to confirm submission and route to your employee for completion.



- A confirmation page will display.

You are currently logged in as Ralphie Buffalo

JAN.16 TEST-CHIP 2019 - 2020 University Staff Performance Planning

Options ▾

- Overview
- Supervisor Goal Planni...
- Supervisor Sign-Off



Chip Buffalo
Academic Services Manager
2/1/2018 - 1/31/2019



You've completed this step in the Performance Planning Task.

The goals, job duties, and competencies created within Cornerstone serve as a fluid representation of the performance plan. They can and should be edited throughout the plan cycle based on the changing needs of the employee and department. These goals, job duties, and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

You may access performance plans in the My Performance Plan tab under the main navigation menu.



13. Complete this process for all of your direct reports.