Cornerstone for Performance Management
User Guide Series:

Performance Planning for Employees
Performance Planning for Employees

Introduction

The University of Colorado Boulder made the decision 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 consistent with campus 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

Purpose of This User Guide

This user guide is intended to walk you through the first of three steps in Performance Management: Performance Planning.

Tasks for the mid-year review 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 to Employee Relations staff here:

www.colorado.edu/hr/cornerstone

Important Definitions

The following definitions should help guide you in using Cornerstone for performance management:

**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 achieve 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 Goal Planning

Establishing individual employee goals and aligning them with the University’s Strategic Imperatives not only enhances performance, but also builds collaborative relationships between employees, teams, and their manager that are focused on using dialogue and feedback as developmental tools.

At the beginning of each performance cycle, managers and employees are responsible for developing goals. While goals should be created within Cornerstone, using such tools as the SMART goal wizard and alignment capability, they should be discussed through ongoing face-to-face dialogue.

The goals 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 and competencies, along with all updates and comments throughout the cycle year, will be pulled into the final performance evaluation task in Cornerstone.

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:
Home Page Review

1. Upon logging in you will land on the Cornerstone **Home Page**
2. Review all tiles for important details regarding the new 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 on your experience using Cornerstone to the implementation team.
1. Using the main navigation menu on the top right-hand corner of the screen, navigate to the “My Performance Plan” option. This is also the same location to create or modify goals within the performance plan.

Home page > Hamburger Menu > My Performance Plan.
You may also click on the “My Performance Plan” tile on the home page to access the same “My Performance Plan” (Goal Creation) page.

2. To add goals, 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.

5. Align your goals with higher-order departmental goals by clicking the **Align** button.

6. 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.

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

8. Select at least one **University Imperative** that best embodies your goal, job duty, or competency.
9. Add specific milestones for your goals under the **Tasks and Targets** section if applicable.

![Tasks and Targets](image)

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

![Attachments](image)

11. 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. If you do not select this box, this goal will be private but will be visible to your manager.

![Visibility](image)

12. Once you have finalized the goal, click **Submit**. The goal will be assigned to you. You also have the option to save the goal as a draft.

![Submit](image)
Completing Tasks in Cornerstone

Employee Goal Planning Task: This task contains a checklist of items to review once initial goal planning has been completed for the plan year. Prior to completing the Employee Goal Planning task, work with your supervisor to ensure goals have been created and that any additional goals have been added.

Completing the Goal Planning Task

1. In the Tasks tile, click on “Complete Goal Planning Checklist.” Note: If your supervisor has not yet completed the checklist and sign-off, you will not see the task. They must complete the task prior to it displaying in your task list.

2. After opening the task, review the task steps on the left-hand side of the screen to become familiar with the steps in the planning process.

3. Review the task overview for an explanation of the purpose of the task and any important details you should know prior to completing the task.

4. Click Get Started to move on to the next step in the task and begin the checklist.
5. Review the Employee Goal Planning Checklist and use the checkboxes to indicate completion of goal planning tasks.

6. If you have not completed goal planning or met with your supervisor to discuss your 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 Employee Acknowledgement.

9. If you are ready to submit the checklist and route it to your employee for completion, click **Submit**.

10. You may also click **Save and Exit** if you are not ready to route to your employee.
11. Click **Submit** in the popup window to confirm submission.

12. A confirmation page will display.