



PERFORMANCE PLANNING USER GUIDE

FOR EMPLOYEES

LOGGING IN

1. Log in to [PioneerWeb](#).
2. Under the Employee Tab, in the My Resources box, click on the Pioneer@Work link.
3. Enter your DU credentials (firstname.lastname@du.edu and PioneerWeb password) which will bring you to the home screen where you can see your performance management tasks.

The screenshot shows the Pioneer@Work dashboard. At the top, there is a search bar and a hamburger menu icon. Below the navigation bar is a large banner image with the Pioneer@Work logo. The main content area is divided into two columns. The left column is titled 'Your Action Items' and contains a table with the following data:


	Due Date
Launch: Learning Adobe Animate CC	8/20/2020
2020-2021 Performance Planning	4/6/2021
View: Managing Student Employees (Starts 6/18/2020 9:00 AM)	None
View: StrengthsFinder (Starts 6/8/2020 8:00 AM)	None
Open: 2020-21: University Policies & Guidelines	None

The right column is titled 'Special Announcements' and contains the following text:

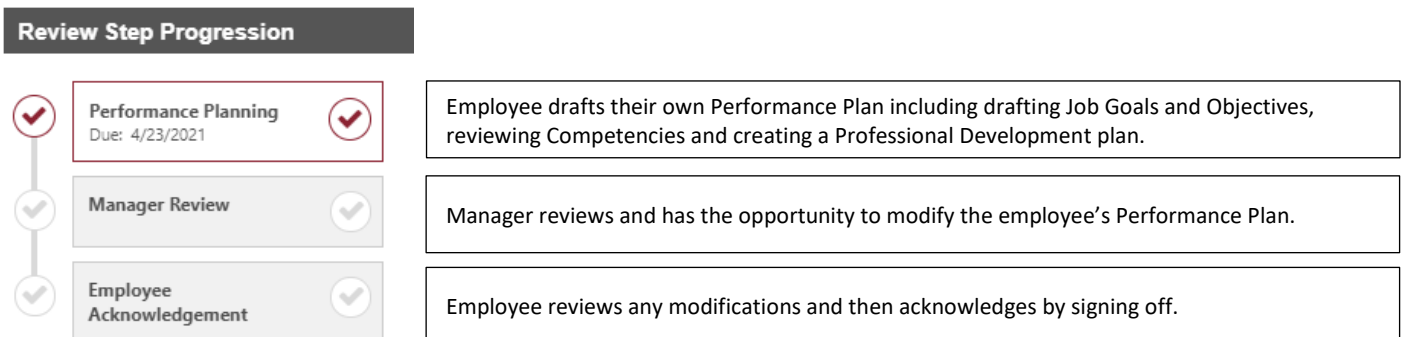
***UPDATE* Performance Planning for 20-21 opens on April 5**

HRIC has been working with divisional leaders to elevate the impactful work that staff have been engaged in throughout the entire year. Documenting the tremendous accomplishments and meaningful work of our staff and administrators is more important than ever. As such, we have adapted our performance management forms to allow all goals to align to divisional goals and **5 Strategic Imperatives**. Please look for an email from performancemanagement@du.edu to begin entering goals for the 20-21 performance management year on April 5th. You will have six weeks to complete the performance planning process of goal setting with a due date of May 15th.

SYSTEM NAVIGATION

- To return to the Home screen at any time, click on the Pioneer@Work logo at the top left.
- Utilize the “Your Action Items” section to engage with all active tasks throughout the Performance cycle.
- Click “View your Profile” to view your Bio, Actions and a Snapshot of your progress.
- Click “View Goals” to view the items in the Job Goals and Objectives, once created.
- This navigation is also accessible through the hamburger menu  at the top right.
- Throughout the process, you have the option to select “Back” to return to the previous screen, select “Save and Exit” to exit the system, or select “Save and Continue” to progress to the next section. Back Save and Exit Save and Continue

PERFORMANCE PLANNING IS A 3- STEP PROCESS:





BEGIN PERFORMANCE PLANNING

1. Click on the **PERFORMANCE PLANNING** task for the current year.

The screenshot shows the Pioneer@Work dashboard. At the top, there is a banner with the Pioneer@Work logo. Below the banner, there are two main sections: 'Your Action Items' and 'Special Announcements'.

Your Action Items		Due Date
Launch: Learning Adobe Animate CC		8/20/2020
2020-2021 Performance Planning		4/6/2021
View: Managing Student Employees (Starts 6/18/2020 9:00 AM)		None
View: StrengthsFinder (Starts 6/8/2020 8:00 AM)		None
Open: 2020-21: University Policies & Guidelines		None

Special Announcements

***UPDATE* Performance Planning for 20-21 opens on April 5**

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2. Read the "Overview".
3. Click **Get Started** at the bottom of the page to begin entering job goals and objectives.

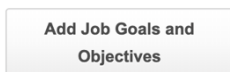
JOB GOALS AND OBJECTIVES (this section is worth 60% of the end of year review)

1. Read the description of "Add Job Goals & Objectives".

The screenshot shows the '2020-2021 Performance Planning' interface for user Lori Learner. The interface includes a navigation menu on the left with options: Overview, Add Job Goals & Objectives (highlighted with a checkmark), Review Competencies, Create Professional Development, and Sign Off. The main content area shows the user's name, profile picture, and a progress indicator of 0%. There is a large button labeled 'Add Job Goals & Objectives' and a smaller button labeled 'Add Job Goals and Objectives'. An 'Options' menu is circled in red in the top right corner.

- a. You can attach your job description. If you would like to do so, click on the **Options** menu and select **ATTACHMENTS**.
- b. Click on **Choose File** to add up to 3 Adobe PDF files or Word documents up to 1MB each.
- c. To finish attaching, click **Save**

2. To add each job goal and objective, click





3. Complete the following fields using the instructions at the top of the webpage.

All fields marked "*" are required

Title *

Description

B I U S Ix | **¶** **☰** **☷** **☶** **☵** **ABC**

Alignment

Not currently aligned

Start Date **Due Date ***

10/1/2020 9/30/2021

DU's Strategic Imperatives *

Select options

Attachments

Upload up to 3 attachments. Maximum upload 1mb

Goal Visibility for Direct Reports

Allow other users to see and align

DU's Strategic Imperatives

DU's Strategic Imperatives *

Select options

Select All

1 - Ensure a bold, sustainable future through our financial, reputational, and operational practices

2 - Create a unique global, holistic, '4D' student experience

3 - Cultivate an exceptionally diverse, inclusive, equitable, and welcoming community

4 - Define and model a global, engaged research university

5 - Ensure academic excellence with a signature portfolio of academic programs

6 - N/A

Select one (or multiple) of DU's Strategic Imperatives that relate to each job goal/objective To learn more about the Strategic Imperatives definitions, click [HERE](#).

If your goal does not correspond to one of the Strategic Imperatives, choose the "N/A" option.



Aligning Goals

You have the option to align your goals to your manager or divisional leader’s goals by clicking **Align**

Title	Owner	Due Date
Be adaptable to change and growth	Susie Supervisor	9/30/2021
Become more efficient in business operations	Susie Supervisor	10/1/2021

Only your goals and your manager’s goals will be initially available. To select a goal to align to, click on the radio button next to the goal title.

To search for your division leader’s or other division team member’s goals, click on this button and enter their name.

To finish aligning goals, click on **Align**.

NOTE: If your supervisor or division leader has selected different strategic imperatives than ones you have chosen for your goal, their selections will be added to the Strategic Imperatives. The Start Date and Due Date of the goals may also change.

4. To finish adding each job goal and objective, click **Save**

5. Once you have successfully added all job goals and objectives, click **Save and Continue** to progress to the next section, Review Competencies.



COMPETENCIES (this section is worth 40% of the end of year review)

1. Read "Review Competencies".

2. Once you have read through the definitions and examples, click **Save and Continue** to progress to the next section, Create Professional Development Plan.

PROFESSIONAL DEVELOPMENT PLAN (this section is *not rated* in the end of year review)

1. Read "Create Professional Development Plan".


2. To add each professional development objective, click **Add Objective**

Note: There are two required steps in the process of adding a professional development objective. Repeat these steps for each objective.

3. Step 1: Enter the Objective Title field and select an Objective Category:
 - **Development Objective** is focused on short-term goals related to one's current role.
 - **Future/Career Development Objective** is focused on long-term career goals.

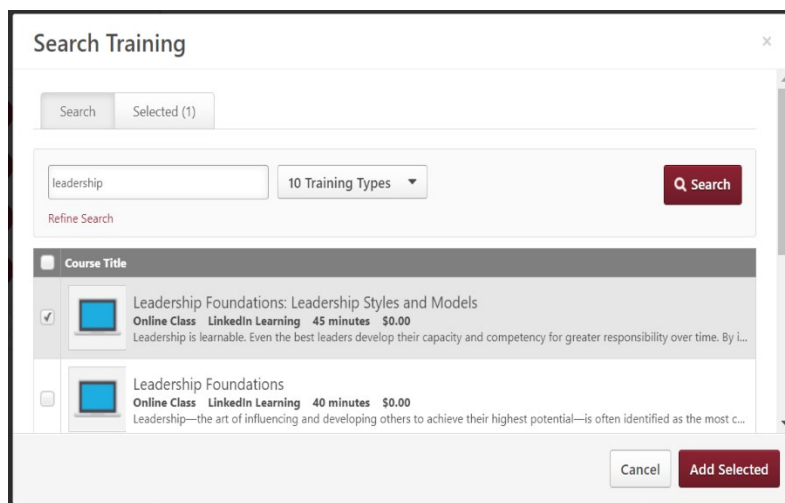


- To complete adding each professional development objective, click **Save**
- Add either Training OR Action Step by selecting the drop down menu. **ALL development objectives must have an associated Training OR Action step.**

Professional Development Objective 1 - (Development Objective) 

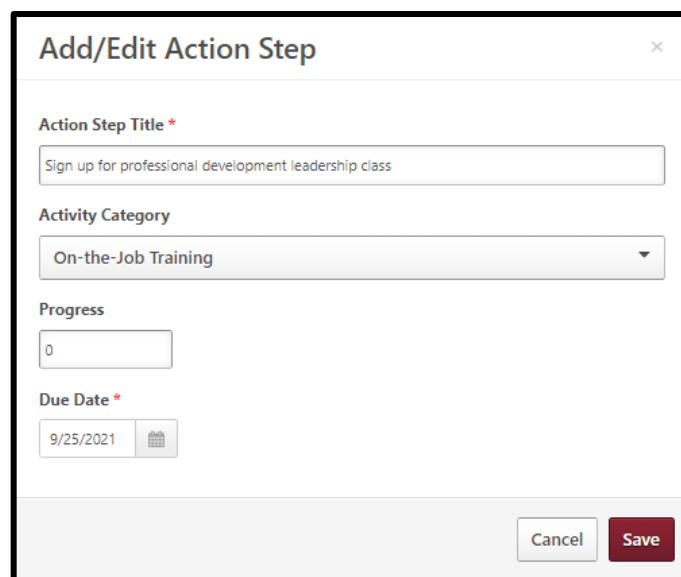
Add Training or Action Steps from the drop down.

- Training:** select from the catalog of LinkedIn Learning courses or other content in the system. You can select more than one training title.
 - Enter a training topic or training title, (i.e. “leadership”)
 - Click “Search”
 - Check the box next to one or multiple training courses
 - Click “Add Selected”



- Action Step:** write in the steps you will take towards achieving this goal
 - Enter the Action Step Title field
 - Select an Activity Category (optional)
 - Enter a due date
 - To finish adding each action step, “click Save”

Note: You may update the due date to accurately reflect the timeline of the action item. Please update progress by entering a percentage number, i.e., entering 50 will represent 50% complete (optional).



- Once you have successfully added all professional development objectives, you will have completed the first step of Performance Planning.
- To send your Performance Plan to your manager for review and modifications, click **Submit**



Improve leadership skills - (Future/Career Development Objective)

Leadership Foundations: Leadership Styles and Models
Due: 9/25/2021

Sign up for professional development leadership class
Due: 9/25/2021 Category: On-the-Job Training Progress: 0%

Back Save and Exit **Submit**



Note: Once you click “Submit”, the Performance Planning task will disappear from the “Your Action Items” section on the homepage. The Performance Plan, once reviewed by your manager, will come back to “Your Action Items” for Employee Acknowledgement to complete the process. You will not be able to view your Job Goals and Development Plan until then.

MANAGER REVIEW

During the Manager Review, your Performance Plan will come back in one of two ways:

Option 1: Reopen Step - Your manager has the option to send the Performance Plan back to you for you to revise. Look for these headings and then move through each of the 3 sections:

Changes need to be submitted to be finalized

Review Step Progression

***This step has been reopened.**
You must complete this step before advancing to the next step.

Option 2: Your manager will review your Performance Plan and may make modifications (edit or delete one of your existing items or assign a new item.) Any additions or modifications to Job Goals and Objectives will have this heading:

New – Please Review

Progress through each section by clicking Next.

EMPLOYEE ACKNOWLEDGMENT

Enter your First and Last name under Employee and click **Sign** (You have the option to enter comments.)

- Comments from your manager will show up below the comment box.
- You **must complete** the Employee Acknowledgement by signing your name in order for your Job Goals and Objectives and Professional Development Objectives to become active and show up on the Home page in “Your Action Items”
- If your manager does not complete their Manager Review step, the task will automatically come back for sign off

QUESTIONS? Reach out to performancemanagement@du.edu