HUMAN RESOURCES &
INCLUSIVE COMMUNITY

PERFORMANCE MANAGEMENT AT DU

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.

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:

Review Step Progression	
Performance Planning Due: 4/23/2021	Employee drafts their own Performance Plan including drafting Job Goals and Objectives, reviewing Competencies and creating a Professional Development plan.
Manager Review	Manager reviews and has the opportunity to modify the employee's Performance Plan.
Employee Acknowledgement	Employee reviews any modifications and then acknowledges by signing off.

BEGIN PERFORMANCE PLANNING

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

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".

   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 **Add Job Goals and Objectives**
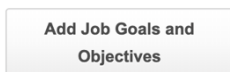
3. Complete the following fields using the instructions at the top of the webpage.

DU's Strategic Imperatives

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 |

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.

4. To complete adding each professional development objective, click **Save**

5. Add either Training OR Action Step by selecting the drop down menu. <u>ALL development objectives must have an associated Training OR Action step.</u>

> **Professional Development Objective 1 - (Development Objective)** ▼
>
> Add Training or Action Steps from the drop down.

a. **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"

Search Training ✕

Search | Selected (1)

leadership | 10 Training Types ▼ | **Q Search**

Refine Search

☐ Course Title

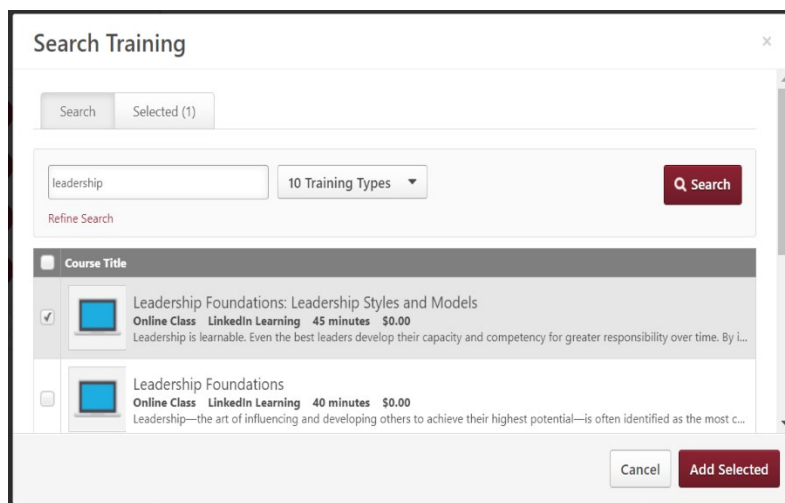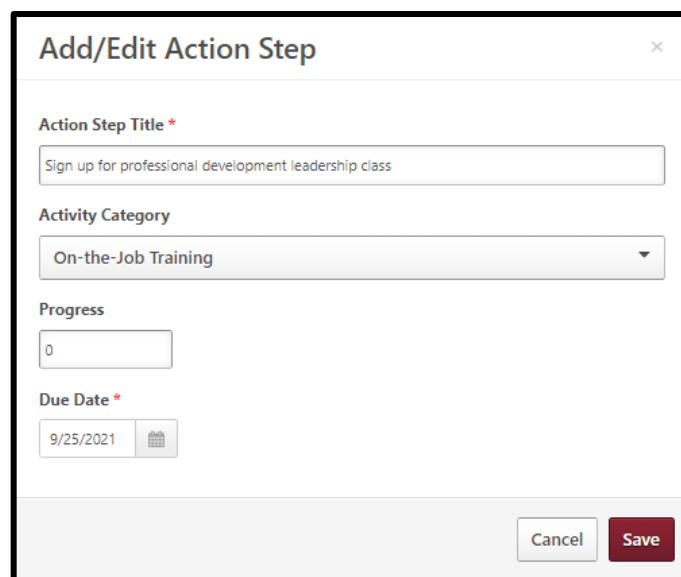☑ Leadership Foundations: Leadership Styles and Models
Online Class   LinkedIn Learning   45 minutes $0.00
Leadership is learnable. Even the best leaders develop their capacity and competency for greater responsibility over time. By i...

☐ Leadership Foundations
Online Class   LinkedIn Learning   40 minutes $0.00
Leadership—the art of influencing and developing others to achieve their highest potential—is often identified as the most c...

Cancel | **Add Selected**

b. **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).

Add/Edit Action Step ✕

Action Step Title *

Sign up for professional development leadership class

Activity Category

On-the-Job Training ▼

Progress

0

Due Date *

9/25/2021 📅

Cancel | **Save**

6. Once you have successfully added all professional development objectives, you will have completed the first step of Performance Planning.

7. To send your Performance Plan to your manager for review and modifications, click **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 manger, 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:

Option 2: Your manger 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:

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