Performance Planning Guide for Manager
Sections of the Performance Plan

- **Overview:** Describes the planning process and the workflow to complete the performance plan.

- **Goals &/Or Key Responsibilities:**
  - Performance Goals are outcomes or measurable objectives.
  - Key Responsibilities are job duties that are “key” or “essential” for the employee to focus on in the performance cycle.

- **Career Development:** The manager and employee establish a career growth and development plan.

- **Signatures:** After the plan has been reviewed, the manager will sign-off prior to the employee.
Initiating the Performance Plan, pg.1

1. Access the performance plan from Cornerstone at cornerstone.wm.edu.

2. Login using your W&M network username and password.

3. Click on “My Tasks” from your Welcome Page.

4. On the Review Summary page, click on the employee name.

5. The Overview page provides an introduction of the process & steps involved to complete the performance plan.
6. Add performance goals for the employee to accomplish during this performance period.

7. Add key responsibilities for the employee to focus on during this performance period.

8. Provide input on the Career Development section.

9. Submit the initial Performance Plan to the employee for their input.

10. Employee will submit the completed Performance Plan back to you for final review with employee and sign-off.
The Performance Plan is accessed from the “My Tasks” button
Performance Review Summary

Click on the link to Complete Performance Plan of “employee’s Name”
The first step is for the manager to provide their input on the employee’s performance plan.
Most departments/units are in Workflow #1. Some departments/units are in Workflow #2. A&S, Athletics and School of Business are in Workflow #3 (refer to the next slide)

To learn more about which workflow you belong to refer to slide #25 and slide #26

Workflow #1 - Performance Plan is completed after employee signs.

Workflow #2 - Reviewer Approval (in Cornerstone)
A&S, Athletics and School of Business: These departments/units have a **Division** Reviewer who will approve the plan off-line (not within Cornerstone)

Workflow #3 - Division Reviewer Approval (approves **OFF-LINE**)
Overview

At the beginning of the performance cycle, the employee and supervisor will together develop the Performance Plan for the new performance period. The Performance Plan consists of two sections:

1. Goals and/or Key Responsibilities
2. Career Development

The workflow for completing the Performance Plan is pictured below in the Review Step Progression. The 1st step begins with the manager providing input on goals and/or key responsibilities for the employee for the current performance cycle.

The 2nd step allows the employee an opportunity to provide input and ideas for their Performance Plan.

The 3rd step provides the manager and employee an opportunity to meet to review the Performance Plan. The manager will be able to sign the plan by typing their name in the Sign-off section.

The final step allows the employee the opportunity to sign the plan by typing their name in the Sign-off section.

The completed Performance Plan is available to the employee and manager from the Performance option located in the top menu bar under "Goals".

To begin completing your portion of the Performance Plan, scroll to the bottom of the screen and click on the "Get Started" button.

This menu displays each section of the Plan

This identifies which step you are completing

Click to begin
Goals &/or Key Responsibilities

Goals and/or Key Responsibilities

At the beginning of the performance cycle, the employee and supervisor will together develop the Performance Plan for the new performance period. The Performance Plan consists of two parts: 1) Performance Goals and/or Key Responsibilities and 2) Career Development.

The position description is a summary of all the responsibilities of the employee in the position. Simply repeating the job duties from the employee’s position description in a performance plan does not necessarily result in a clear outcome. Rather a performance plan should identify specific goals or key responsibilities on which to focus.

**Performance Goals:** Goals are outcomes or measurable objectives to be accomplished during a specific time frame. Goals can serve as an effective tool to employees in understanding what is expected of them and where to focus their priorities. A performance goal is a desired result or possible outcome that an employee plans and commits to achieve. Performance goals can include any plan or commitment that might be:

- a short-term objective for a specific job duty or task
- a job-oriented expectation or priority
- focused on a special project
- an important result the employee is working to achieve

**Key Responsibilities:** Job duties that are “key” or “essential” for the employee to focus on in the current performance cycle.

Not all job duties or responsibilities are of the same relative importance. In lieu of a performance goal or objective, identify key or essential performance factors that will define what success looks like in the job in the current performance cycle.

Instructions for adding either a Goal or Key Responsibility:

- Click the button located in the upper right area of the form titled “Add Goal and/or Key Responsibility”.
- Clicking on the drop-down menu to the right of the goal offers the option to edit, delete, and view history.
- Clicking on the edit option offers the option to edit, add tasks, upload attachments and add comments.
- Scroll to the bottom, select button “Save and Continue” when you are ready to move to next section.
Creating a Goal

1. Click on this button to add a goal.

2. Enter the details for the goal such as Title & Description.

3. Click “Save”
Using the Wizard

Create Goal and/or Key Responsibility

Enter details for the goal you are creating, or import using the SMART Wizard or the Library.

Wizard

Specific  Measurable  Actionable  Relevant  Timely

Goal and/or Key Responsibility should be straightforward and specific in their description. Specificity has greater impact and increases the likelihood of the goal and/or key responsibility being accomplished.

Title *

Title

Description

Click “Continue”

Cancel  Continue
Adding Tasks

Tasks
Add Tasks

Create Goal and/or Key Responsibility

Enter details for the goal you are creating, or import using the SMART Wizard or the Library.

Title

Description

Due Date

Weight

Tasks
Add Tasks

Attachments

Choose Files

Upload up to 3 attachments. Maximum upload 1mb

Click “Save”
Adding Weight & Attachments

Create Goal and/or Key Responsibility

Enter details for the goal you are creating, or import using the SMART Wizard or the Library.

Title *
Title

Description

Due Date * Weight *
10/24/2017 0

attachments

Click “Save”
Creating a Key Responsibility

Add Goal and/or Key Responsibility

Click “Save”
Creating a Key Responsibility

When finished adding Goals and Key Responsibilities click on “Save and Continue”
Career Development

Togethe the manager and employee may establish a career growth and development plan. The plan may include some or all of the following:

- action steps to help develop new skills and/or knowledge
- action steps to help reach performance goals or achieve key job responsibilities
- training opportunities to enhance career growth and development

Identify action steps to help employee reach performance goals or achieve key job responsibilities.

Using the text box, provide any action steps for the employee to take during this performance cycle to reach performance goals or achieve key responsibilities.
Career Development

You can return to the Plan or if you are ready to submit your portion of the Performance Plan, simply click on the “Submit” button.
Submit Plan

You can submit and log out of Cornerstone or complete other actions by clicking on the “Go to Action Items” button.

Thank you for completing this step of the performance planning process. To log out click on the "gear" icon located in the upper right hand corner of the screen.

If you have other actions to complete, click on the "Go To Action Items" button below.
Employee’s Input

1. The employee will review the information you provided in the Performance Plan and will enter her/his input.

2. The employee will submit the Performance Plan back to you for final review and sign-off.
Sign-off

Workflow #1 (refer to slide #25 and slide #26)

1. You will have the opportunity to review the Performance Plan one more time and sign-off.
2. The employee will then receive an email requesting his/her signature.
3. The Performance Plan is now completed for departments/units in Workflow #1.
Sign-off

Workflow #2 (refer to the slide #25 and slide #26)

1. You will have the opportunity to review the Performance Plan one more time and sign-off.
2. The employee will then receive an email requesting his/her signature.
3. The reviewer will view the plan and approve it after the manager and the employee have signed-off.
Sign-off

**Workflow #3** (refer to the next two slides)

1. You will have the opportunity to review the Performance Plan one more time and sign-off.

2. The employee will then receive an email requesting his/her signature.

3. A&S, Athletics and Business school will have the division reviewer approve off-line after the manager and the employee have signed-off.
Workflows

The following workflows have been identified:

**Workflow #1**
manager initiates plan/employee provides input/manager and employee discuss and sign off.

**Workflow #2**
manager initiates plan/employee provides input/manager and employee discuss and sign off/reviewer approves.

**Workflow #3**
manager initiates plan/employee provides input/manager and employee discuss and sign off/reviewer approves off-line.

To determine if your department/unit falls under Workflow #1, Workflow #2, or Workflow #3 see next slide.
Workflow - Departments and Units

Workflow #1 (manager-employee)
All departments/units with the exception of the ones listed below.

Workflow #2 (manager-employee Reviewer)
Advancement, Information Technology, Finance, Student Affairs, and VIMS.

Workflow #3 – (manager-employee-division reviewer)
A&S, Athletics, and School of Business.
Additional Questions

If you have questions please contact the Office of Human Resources

– askHR@wm.edu
– Mane Pada at mepada@wm.edu

Thank You