

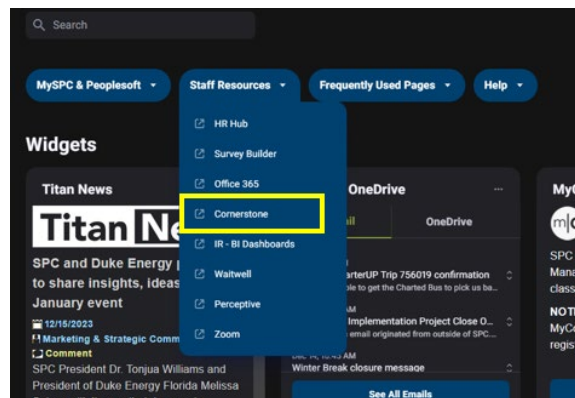
## How to Create a Development Plan for a Direct Report

Meet with your direct report(s) for a one-one-one to discuss their goal progress and [Competency Descriptions](#). Use the [One-on-one template](#) to guide your meeting. Then, determine whether your direct report needs a development plan.

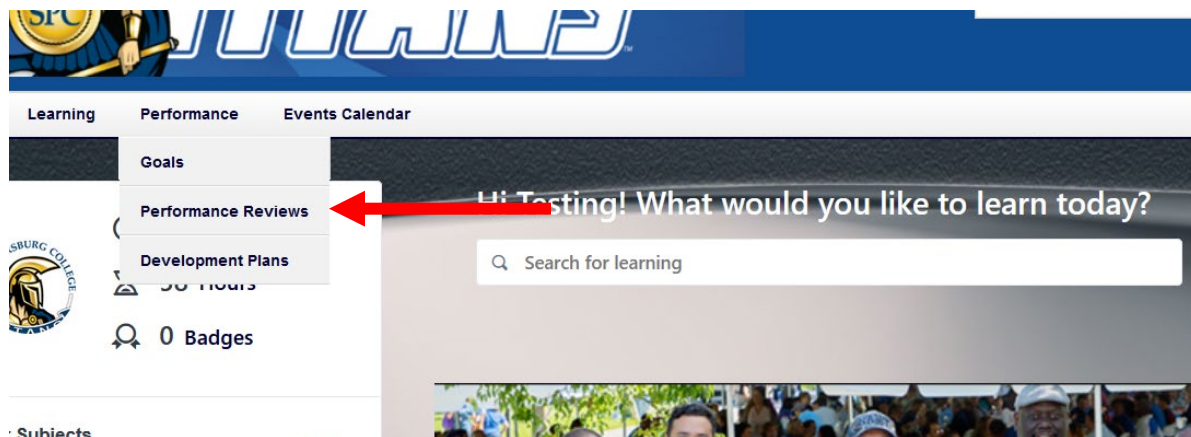
If your direct report does not need a development plan, indicate in the comments, “No development plan needed at this time”, then sign off.

**\*If your direct report needs a development plan, it is recommended that you open the performance review task during your one-on-one to create a development plan together.**

### 1. Sign in to Cornerstone from the TitanHub > Staff Resources > Cornerstone



### 2. From the Cornerstone Homepage, go to Performance > Performance Reviews



3. From your Performance Review Summary page, click on the task.

Performance Review Summary - Phi Nguyen

My Assigned Reviews

My Personal Reviews

Title:

Search

Status:

☒ Not Started
☒ In Progress
☐ Completed
☒ Incomplete
☐ Expired

Title	Description	Status	Start Date	Due Date	Last Modified Date
Submit Development Plan for Testing User1	This is the second task in the 2024-2025 annual performance ...	Not Started	4/18/2024	4/30/2024	4/18/2024
Complete Competency Ratings for Testing User1	This is the final task in the 2024-2025 annual performance f...	Not Started	4/12/2024	11/30/2024	4/12/2024
Complete FY 24-25 Mid-year Check-in for Testing User1	This is the second task in the 2024-2025 annual performance ...	In Progress	4/12/2024	7/31/2024	4/12/2024

4. Review the Overview.

Overview

Start of 2024-2025 Annual Performance Review

This task involves four (3) steps.

Step One:

Manager and Direct Report meet one-on-one to discuss goal progress and competencies.

Step Two:

Manager determines whether the employee is in need of a development plan.

- If the employee needs a development plan, the manager creates it in the task and signs of.
- If the employee does not need a development plan, the manager indicates that no plan is needed in the comments and signs off.

Step Three:

Employee signs-off.

\*Note: Prior to completing this performance review task, it is highly suggested that the manager meet with their direct report(s) to discuss their SMART goal(s) and review the competencies for this year. This will ensure that the goal aligns with SPC's pillars and departmental goals, and eliminate the need for revisions when the employee submits their goal for approval. A one-on-one template is available for supervisors on the HR Hub > Organizational Effectiveness and Success > Supervisor Resources

Additional information and tutorials about Performance Management is available at the HR Hub > Performance Management

5. Click on “Get Started”.

Review Step Progression

Check-in and Development Plan

Due: 4/30/2024

Development Plan Sign-off

Get Started

6. **IF NO PLAN IS NEEDED:** From the Development Plan page, click “Save and Continue”. Then in the sign off section, indicate, “No plan needed at this time” in the comments section. Then sign off and click “Submit”.

## (Test 2.0) FY 2024-2025 Check-in and Development Plan

[Options](#)**Testing User1**

7/1/2024 - 6/30/2025

0%

## Development Plan

[Add Objective](#)[Back](#)[Save and Exit](#)[Save and Continue](#)

Manager

Phi Nguyen

[Sign](#)

Comment

**B** **I** **U** **S** **T** **1** **=** **\*** **=** **ABC** **✓**

No plan needed at this time.

[Back](#)[Save and Exit](#)[Submit](#)

7. **IF A DEVELOPMENT PLAN IS NEEDED:** Click on “Add Objective”.



Testing User1  
7/1/2024 - 6/30/2025



## Development Plan

Add Objective

Back

Save and Exit

Save and Continue

Submit

8. Give the Objective a title that corresponds to one of the Objective Categories. Then select a category. The objective categories are based on the 7 competencies in the [Competency Descriptions](#). After adding a title and category, click “Save”.

### Add/Edit Objective



Objective Title \*

Work on Communication Skills

Objective Category

Communication

Cancel

Save

- 9.

The screenshot shows the 'Add/Edit Objective' form. A red box highlights the 'Select Objective Category' dropdown menu, which is open and shows a list of categories: Accountability, Adaptability, Communication, Customer/Quality Focus, Functional Expertise, and Leadership. A red arrow points from the 'Competencies' label to the 'Functional Expertise' category. Another red arrow points from the 'Save' button to the top right corner of the form. The form also includes an 'Objective Title' field and 'Cancel' and 'Save' buttons.

Add/Edit Objective

Objective Title \*

Objective Category

Select Objective Category

- ✓ Select Objective Category
- Accountability
- Adaptability
- Communication
- Customer/Quality Focus
- Functional Expertise
- Leadership

Cancel Save

Competencies

**10. Then add Training and/or Action Steps.**

**a. To add Training and/or Action Steps to the Development Plan.**

The screenshot shows the 'Work on Communication Skills - (Communication)' form. A red box highlights the text 'Training = Cornerstone offered course'. A red arrow points from this box to the 'Add Training' option in the dropdown menu. Another red arrow points from the 'Back' button to the 'Add Action Step' option in the dropdown menu. The form also includes a 'Progress: 74%' indicator and a 'Save' button.

Work on Communication Skills - (Communication)

Add Training or Action Steps from the drop down.

Training = Cornerstone offered course

Back Save

- Edit Objective
- Delete Objective
- Add Training
- Add Action Step

**b. Trainings are Cornerstone offered courses.**

- \*Prior to this step, it is suggested that you search for courses from the learner homepage, so you can easily identify and choose the course you would like to complete.
- Search for a course that relates to the topic you want your direct report to learn about.

- iii. Choose the training you want to add and click on “Add Selected” This training will be added to the Development Plan.

## Search Training



Search

Selected (0)

What would you like to search for?

12 Training Types

Search

Refine Search

Cancel

Add Selected

## Search Training







communication

12 Training Types

Search

Refine Search

<input type="checkbox"/>	Course Title
<input type="checkbox"/>	 Communication Toolkit: Communication Is Critical Online Class Bizlibrary Welcome to the "Communication Toolkit: Communication Is Critical" video lesson meant to help learners better understand t...
<input type="checkbox"/>	 Clear Communication is Inclusive Communication Online Class Grovo It can be tempting to project our own communication styles onto others. Use these tactics to avoid miscommunication and e...
<input checked="" type="checkbox"/>	 Better Business Communication: The Essential Elements of Effective Verbal Communication Online Class CyberU What? Talking to people – like, actually talking to them? Yeah, it's still a thing, and this course will help you survive your next c...
<input type="checkbox"/>	 5G Machine-type Communication: Applications of Machine-to-machine Communication Online Class Skillsoft

Cancel

Add Selected

**11. Action Steps are independent trainings to help your direct report achieve their goals.**

These can be taking online courses, courses at SPC, attending a conference, or any other professional development activity.

- Give the Action Step a Title: i.e.: "Take a certification course"
- Select an Activity Category. Categories include: Certification course, SPC course(s), Conference, etc.
- (Optional) Indicate the progress % if this is a step your direct report has already started. For example, if they are already halfway through a certification, you can type 50.
- Click "Save". This action step will be added to your Development Plan.

**Add/Edit Action Step****Action Step Title \*****Activity Category**

Select Activity Category


**Progress****Due Date \***


Cancel

Save

12. When you have finished creating the Development Plan, scroll to the bottom of page and click “Save and Continue”.

Work on Communication Skills - (Communication)

 **Better Business Communication: The Essential Elements of Effective Ve...**  
Due: 1/1/2025

 **Take a Certification Course**  
Due: 2/28/2025 Category: Conference Progress: 25 %

[Back](#) [Save and Exit](#) [Save and Continue](#)

13. Check to ensure that the Development Plan is satisfactory and enter an electronic signature and click “Sign”. Make additional comments if needed.

\*When Testing User1 signs-off and submits the form, the 2024-2025 annual performance review period is complete for that employee.

Manager

Phi Nguyen

Sign

Self

Manual Signature on the printable version

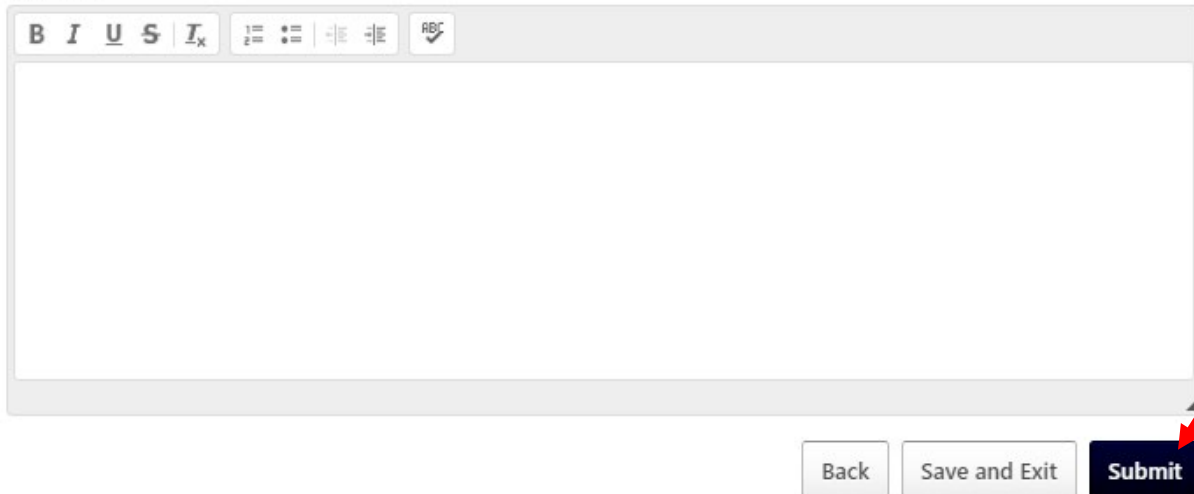
Comment

**B I U S I<sub>x</sub>**     



14. Scroll to the bottom of page and click “Submit”.

Comment



A screenshot of a web form titled "Comment". It features a rich text editor with a toolbar containing icons for bold (B), italic (I), underline (U), strikethrough (ABC), bulleted list, numbered list, indent, and outdent. Below the toolbar is a large empty text area. At the bottom right of the form are three buttons: "Back", "Save and Exit", and "Submit". A red arrow points to the "Submit" button.

**\*An additional pop-up will appear to confirm whether you want to Submit. Once you Submit here you will not be able to make any changes.**

Submit Review

×

You will not be able to modify once you have submitted. Are you sure that you want to submit now?

Cancel

Submit

15. Your direct report will receive an email indicating that a Development Plan has been created and that they need to review it and sign off.