3. Goals

- Goal Setting

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- Archiving

Goal Setting & Alignment

What is it?

- Process of **defining and documenting employee performance goals** for the year.
- Collaborative process of **coordinating goals to ensure they are consistent and integrated** up, down and across the organization.

Why?

- To **set performance expectations** between managers and employees
- To **assess employee performance** in a fair and consistent manner
- To **ensure the correct prioritization** of our job activities and efforts

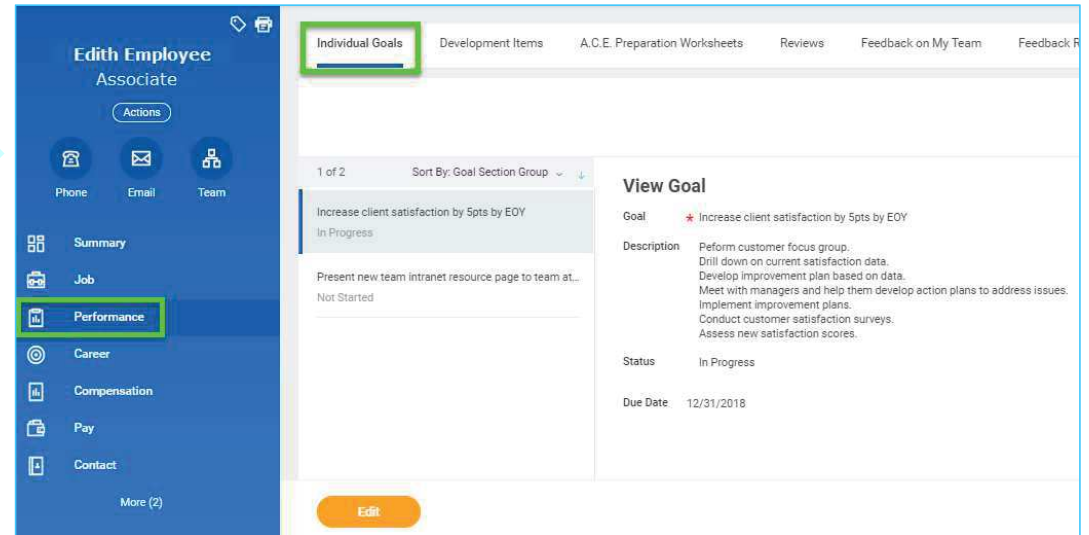**Keep in mind the following when managing your goals:**

- Contribution to accomplishing the organization's goals

- 4 to 6 goals

- Coordinated with your manager's goals

- Include both What and How

- SMART framework

- Goals require approval from your manager

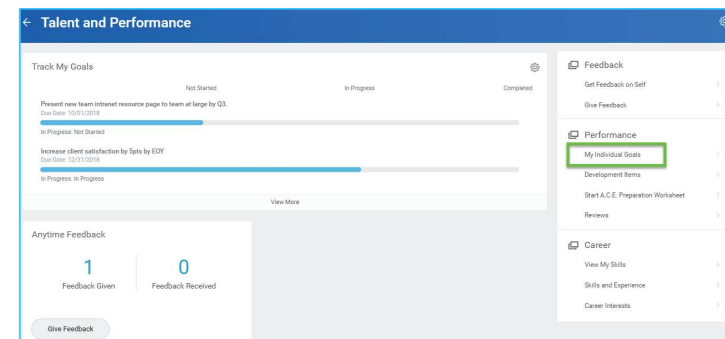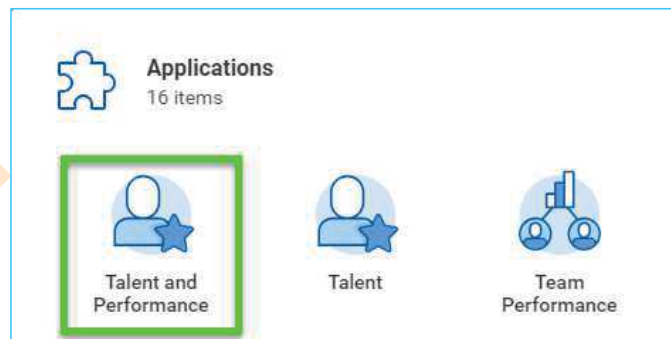# Two ways to **Access** your **Goals**

Main Access:

Worker Profile > Performance >
Individual Goals

- Or -

Shortcut:

Talent and Performance
Application >
My Individual Goals

Goals: Setting and Updating

Throughout the year, priorities can change and some Goals may need to be updated.

How To Set

1. In the **Items** tab - Click **Add**.
2. Enter a **Goal**. *Required*
3. Enter a goal **Description**.
4. Select a **Status**.
5. Enter a **Due Date**. *Required*
* Repeat steps 1-5 for multiple goals
1. Click **Submit**.

TIP: Not ready to submit? Use the **Save for Later** button to save a draft.

How To Update

1. Click the goal to be updated.
2. Update, where applicable. *Goal Name and Due Date Required*
3. Click the **Submit** button.

All goals (and updates) are submitted to manager for review and approval.

Goals: Notes on View and Status

Notes on Goals...

- There are two ways to view goals - **list or grid.**
  List view is default and grid has filtering capability.
  Click the icons above your goals to toggle between the views.

- Goals that are still in draft mode will display as **Saved for Later**.

- Goals that have been submitted and not yet approved will display as **Pending Approval.**

  - **!** • You cannot change/edit a goal that is pending your manager's approval
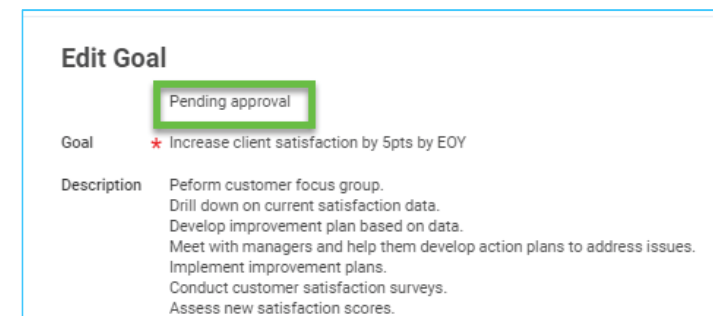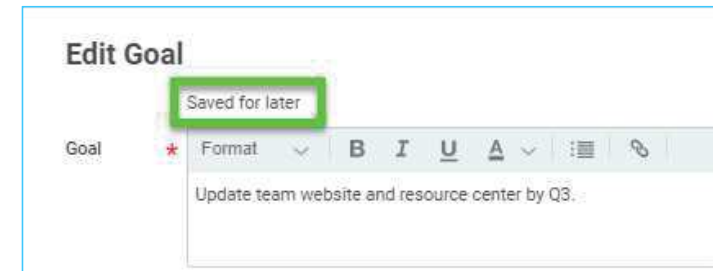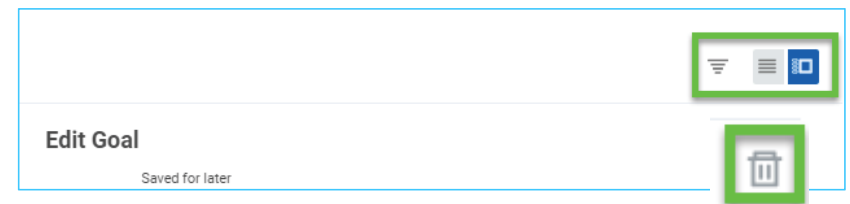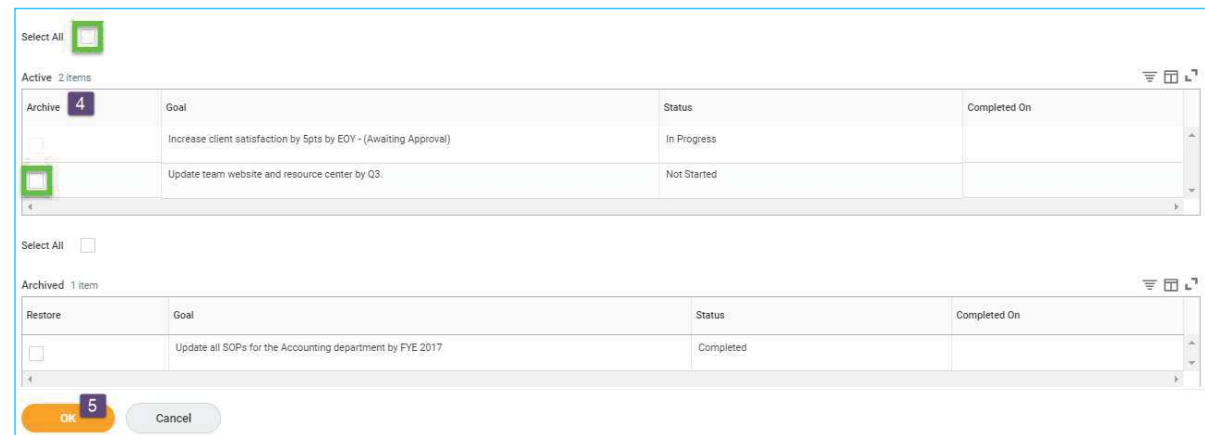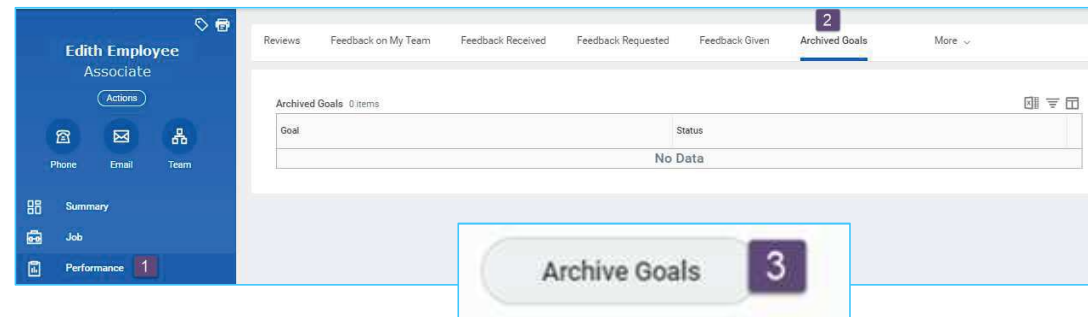
Goals: Archiving

Goals are not tied to a calendar year – once you complete a goal, you can archive it

! Only Approved goals can be archived

How To Archive

1. Click Performance from Worker Profile.
2. Click **Archived Goals** tab.
3. Click **Archive Goals** button.
4. Select goals using the checkboxes.
5. Click **OK**.

* Follow steps to restore any previously archived goals.

All archive requests are submitted to manager for review and approval.