

Meaningful Conversations

Goal Setting and Journaling

Importance of Goal Setting and Journaling

- Goals are defined to enhance an employee's skill set and drive results for a department.
- Setting goals is the initial step of the review process and should be completed as early as possible at the beginning of the review period.
- This helps employees understand what their priorities are in part for the year.
- Create goals in collaboration with each employee. Two to three goals per employee is sufficient. Do not include regular daily tasks which are reviewed in the competencies section of the review form.
- Managers and employees can enter notes related to goals throughout the review period to aid in completing the annual review process.



Entering Goals in the Employee Portal

- **New for 2022-23:** Goals can be entered by the manager or the employee
- Two options for entering goals:
 - Individual goals - entered by the manager or employee via Career & Education > Goals
 - Assignable goals – best way to add the same goal for more than one employee
 - Assignable goals are available for the manager only via My Team > Talent Management > Assignable Goals

Goals

Find by: Status is Active Search

Filtered by: Status - is Active [Clear Filters]

Title	Description	Type	Due Date	Weight	Goal Progress	Status	Created By	Delete
No records found								

Assignable Goals

Create, edit and assign goals for employees on your team.

Find by: Status is Active Search

Filtered by: Status - is Active [Clear Filters]

Displaying all records

Actions: Add Delete Assign

Title	Description	Assignments	Editable	Status	Owner
Document HR Processes	Write comprehensive process (how-to) instructions and include important screen shots so someone else ...	2 Employees	No	Active	Traini, Christine E.
Develop system to stay organized	Develop a tangible system to stay organized, on top of all job responsibilities, and responsive to customers. ...	2 Employees	No	Active	Traini, Christine E.
Professional development	Identify and participate in one professional development seminar or conference that is job-related, ...	2 Employees	No	Active	Traini, Christine E.
Engage in DEI training to support the employment role	In support of the division's goal of training hiring managers and search committees to become more aware ...	1 Employees	No	Active	Traini, Christine E.
Benefit plan enhancements	Explore and implement 1-2 benefit plan enhancements that are cost-effective, serve employees' needs, ...	1 Employees	No	Active	Traini, Christine E.

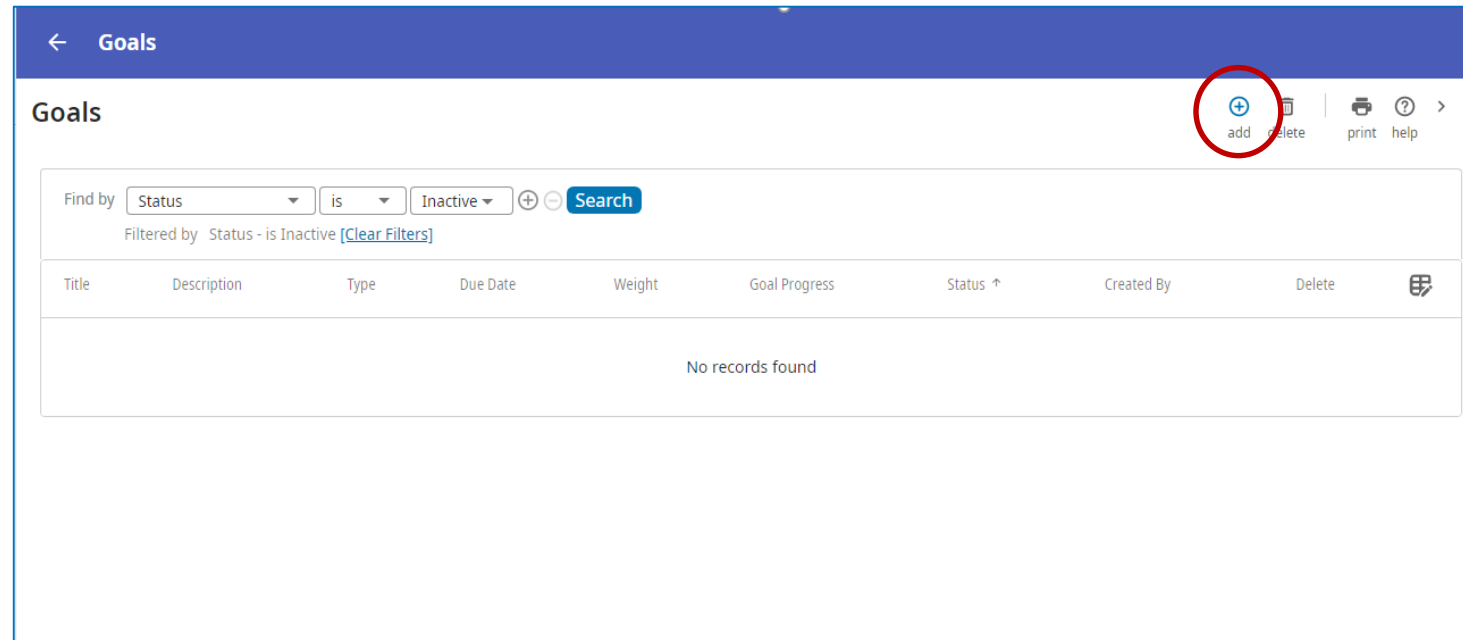
Tips for Entering Goals

- 2-3 goals per employee
- Planning goals should be a collaborative process. Once goals are agreed upon, the manager or the employee can enter them in the portal.
- Goals should be written using SMART goal criteria to guide in setting objectives for better results:
 - Specific
 - Measurable
 - Attainable
 - Relevant
 - Time-Based
- **Important Note:** the Goal Planning feature in the portal is not currently used. Do not create individual goals or assignable goals in this area.

S	Specific Clearly State your Goal
M	Measurable Ensure you can Measure Success
A	Attainable Set Goals you know you can Achieve
R	Relevant Set Goals Relevant to your Career or Education
T	Time-Based Set a Deadline for Completion

Adding Individual Goals – Process Steps

- **Managers:** My Team > My Employees > Select an Employee > Career & Education > Goals
- **Employees:** Myself > Career & Education > Goals
- Click the Add button



The screenshot shows a web application interface for managing goals. At the top, there is a blue header with a back arrow and the word "Goals". Below the header, the word "Goals" is displayed. In the top right corner, there are several action buttons: "add" (circled in red), "delete", "print", and "help". Below these buttons is a search bar with the text "Find by" and a dropdown menu showing "Status is Inactive". A "Search" button is to the right of the search bar. Below the search bar, it says "Filtered by Status - is Inactive [Clear Filters]". Below this is a table with the following columns: Title, Description, Type, Due Date, Weight, Goal Progress, Status ↑, Created By, and Delete. The table is currently empty, and the text "No records found" is displayed in the center.

Adding Individual Goals – Process Steps

- Enter a Title for the goal. Titles can start with the fiscal year, such as 2023, to help with sorting.
- Enter details of the goal in the Description field using the SMART goal format
- Choose goal category from the options in the drop down list and enter a weight for the goal in the next field.
- **Note:** Goals weights must add up to 100% for each employee.
- For Goal Type, select from the options in the drop down list
- Enter goal dates: 7/1/2022 or later for the start and 6/30/2023 or earlier for end
- Click SAVE when done

The screenshot shows a web interface for adding or changing goals. The title bar is blue with a back arrow and the word 'Goals'. Below the title bar is a header 'Add/Change Goals' with a toolbar containing icons for save, reset, cancel, print, and help. The main form area is divided into sections: 'Goal Details' with fields for Title and Description (with a rich text editor toolbar), 'Category' (a dropdown menu), 'Goal Type' (a dropdown menu), and 'Goal Dates' with fields for Start and Due dates (each with a calendar icon). The Status section has radio buttons for 'Active' (selected) and 'Inactive'.

Creating Assignable Goals and Adding to Employees – Process Steps

- Managers only: My Team > Talent Management > Assignable Goals
- Click the Add button

The screenshot shows the 'Assignable Goals' interface. At the top, there is a blue header with a back arrow and the text 'Assignable Goals'. Below the header, there are navigation icons for 'print' and 'help'. The main content area has the title 'Assignable Goals' and a subtitle 'Create, edit and assign goals for employees on your team.' Below this is a search bar with 'Find by' dropdowns for 'Status' (set to 'Active'), 'is', and 'Active', followed by a 'Search' button. Below the search bar, it says 'Filtered by Status - is Active [Clear Filters]' and 'Displaying all records'. In the 'Actions' bar, the 'Add' button is highlighted with a red box. Below the actions bar is a table with columns: Title, Description, Assignments, Editable, Status, and Owner Name. The table contains six rows of goal entries.

<input type="checkbox"/>	Title	Description	Assignments	Editable	Status ↑	Owner Name
<input type="checkbox"/>	Document HR Processes	Write comprehensive process (how-to) instructions and include important screen shots so someone else ...	2 Employee(s)	No	Active	Traini, Christine E.
<input type="checkbox"/>	Develop system to stay organized	Develop a tangible system to stay organized, on top of all job responsibilities, and responsive to customers. ...	2 Employee(s)	No	Active	Traini, Christine E.
<input type="checkbox"/>	Professional development	Identify and participate in one professional development seminar or conference that is job-related, ...	2 Employee(s)	No	Active	Traini, Christine E.
<input type="checkbox"/>	Engage in DEI training to support the employment role	In support of the division's goal of training hiring managers and search committees to become more aware ...	1 Employee(s)	No	Active	Traini, Christine E.
<input type="checkbox"/>	Benefit plan enhancements	Explore and implement 1-2 benefit plan enhancements that are cost-effective, serve employees' needs, ...	1 Employee(s)	No	Active	Traini, Christine E.

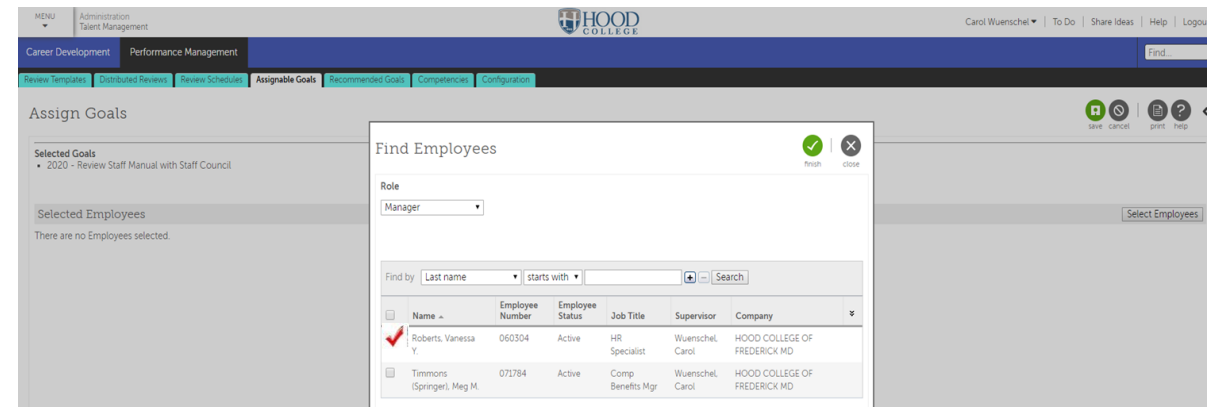
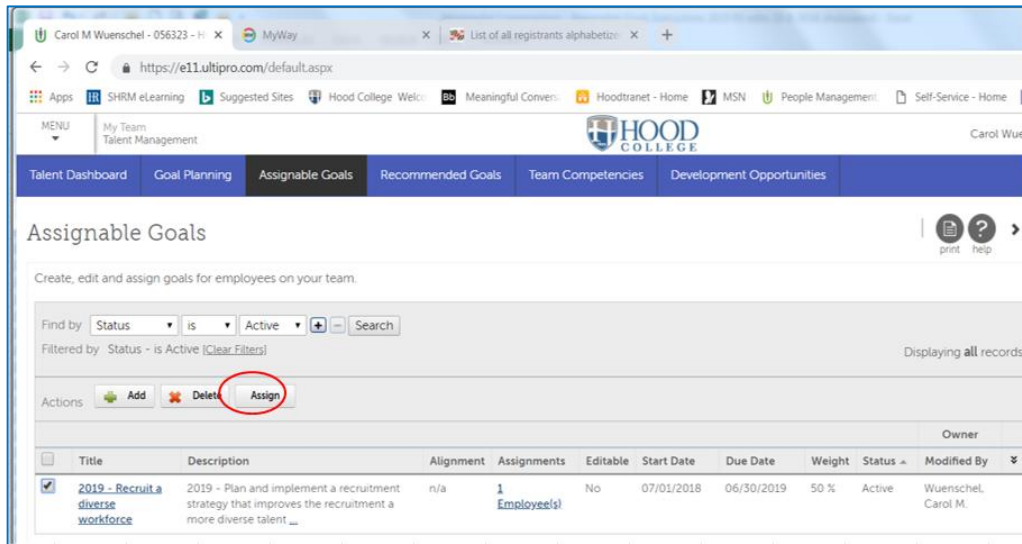
Creating Assignable Goals and Adding to Employees – Process Steps

- Enter a Title for the goal. Titles can start with the fiscal year, such as 2023, to help with sorting.
- Enter details of the goal in the Description field using the SMART goal format
- Choose goal category from the options in the drop down list and enter a weight for the goal in the next field.
- **Note:** Goals weights must add up to 100% for each employee.
- For Goal Type, select from the options in the drop down list
- Enter goal dates: 7/1/2022 or later for start and 6/30/2023 or earlier for end
- Decide if employees can edit the goal. In most cases, select No.
- Click SAVE when done

The screenshot displays the 'Assignable Goals' web interface. At the top, there is a blue header with a back arrow and the text 'Assignable Goals'. Below the header, the main content area is titled 'Add/Change Assignable Goals'. In the top right corner of this area, there are icons for 'save', 'reset', 'cancel', 'print', and 'help'. The form is divided into several sections: 'Goal Details' contains a 'Title' field, a 'Description' field with a rich text editor (including bold, italic, underline, strikethrough, and list options), and a 'Status' section with radio buttons for 'Active' (selected) and 'Inactive'. Below this is a 'Category' dropdown menu. The 'Goal Type' section has another dropdown menu. The 'Goal Dates' section includes 'Start' and 'Due' date pickers, both showing the format 'MM/DD/YYYY'. The 'Editable by Employees' section contains two radio button options: 'No - employees cannot edit' (selected) and 'Yes - employees can edit'. Each option has a brief explanatory text below it.

Creating Assignable Goals and Adding to Employees – Process Steps

- On the Assignable Goal main screen, select the goal to be assigned by clicking on the box to the left of the Goal Title
- Then, click the Assign button
- You will be given an option to Select Employees, then the Find Employees window will appear. Select employees in the list to assign the goal. **Best practice:** add the goal to more than one employee to utilize functionality of this process.
- Click Finish to complete the process



Journaling

Journaling

- Managers and employees can enter notes related to goals throughout the review period to aid in completing the annual review process.
- Note-taking throughout the year will aid and simplify the self-evaluation and manager review processes. They'll basically write themselves!
- Notes associated with goal completion or competencies are viewable:
 - Privately by the author;
 - By everyone who has access to the employee's review; or
 - By management only (restricted from the employee's view)
 - **Note:** HR administrators can see notes too



Adding Notes to Goals – Process Steps

- **Managers:** My Team > My Employees > Select an Employee > Career & Education > Goals
- **Employees:** Myself > Career & Education > Goals
- Click the progress hyperlink associated with a specific goal
- Enter comments, update goal progress if appropriate; select who can see the comment and if it should be visible in the review form and click the Post button.
- Comments will post at the bottom of the screen. They can be edited or deleted if necessary.

Title	Description	Type	Weight	Goal Progress	Status	Created By	Delete
Develop system to stay organized	Develop a tangible system to stay organized, on top of all job responsibilities, and responsive to customers. ...	Internal Business Processes	25 %	0% complete	Active	Traini, Christine E	<input type="checkbox"/>

Develop system to stay organized

Goal Progress % complete

Who can see this?
 Only Me
 Everyone
 Restricted

Visible from Review

Adding Notes– from Talent Dashboard

- **Managers:** My Team > Talent Management > Talent Dashboard > My Direct Reports
- Note-taking from the Talent Dashboard is available on the Goals and Competencies tabs
- Notes can be created for each goal or competency. They also can be created for the overall review.
 - Notes for a goal (or competency) can be added via the Notes hyperlink circled in red
 - Overall manager notes for a review can be added via the Paper hyperlink outlined in green

Talent Dashboard


▶ Team Analytics & News





My To Do's | My Direct Reports

Reviews	Goal Plans	Leadership Actions	Goals	Competencies	Learning	Development Plans
0 Outstanding Reviews	0% Goal Plan Completion	0 Outstanding Actions	2.7 Average per Employee	1.3 Average per Employee	0 Average per Employee	0 Outstanding Plans

Find by: Last name ▼ Starts With ▼

Showing 3 of 3 employees

 **Amanda Harris**
Comp Benefits Mgr
Ext. aharris@hood.edu

Document HR Processes	0%	<input type="text"/>	Notes
Develop system to stay organized	0%	<input type="text"/>	Notes
Professional development	0%	<input type="text"/>	Notes
Benefit plan enhancements	0%	<input type="text"/>	Notes

Resources

Available Resources

- Resources are available in the right navigation bar of the portal for employees and managers
 - Resources are different based on your role
- YouTube : [How to Create SMART Goals Effectively](#)
- Contact Christine Traini, Director of Human Resources at traini@hood.edu

Employee View

Things I Can Do

For This Page

[View Recommended Goals](#)

[Add/Change Goal Weighting](#)

Learning Resources ⓘ

[Talent Management Resources for Employees](#)

Manager View

Things I Can Do

For This Page

[Add/Change Goal Weighting](#)

Learning Resources ⓘ

[Talent Management Resources for Managers and Administrators](#)