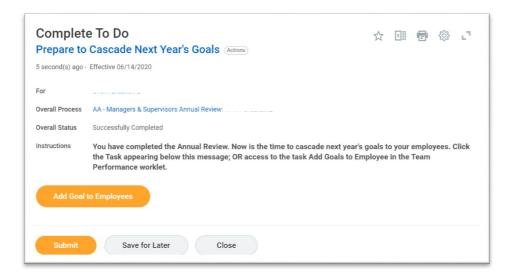


TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

After the employee's annual evaluation or probationary 3-month evaluation process is completed, the manager will receive the following task in their Workday inbox: **Prepare to Cascade Next Year's Goals**.



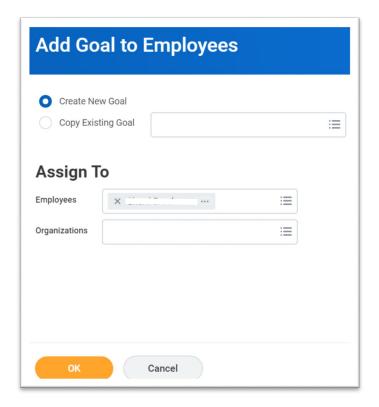
The manager and employee must discuss and agree upon goals for the upcoming year before entering them into Workday. This discussion may take place during the 1:1 discussion in the evaluation process. It may feel natural, after reflecting on the past year (or 3 months for probationary employees) to then discuss the upcoming year. The discussion about the upcoming year may also be held in a meeting separate from the evaluation process.

Set two to five goals which are job-oriented. Keep in mind the goals should:

- Support the mission, vision, initiatives
- Be challenging and attainable
- Have specific, explicit measures
- Have objectives that can be achieved within the assessment cycle
- Identify resources needed

MANAGER: ADD GOAL

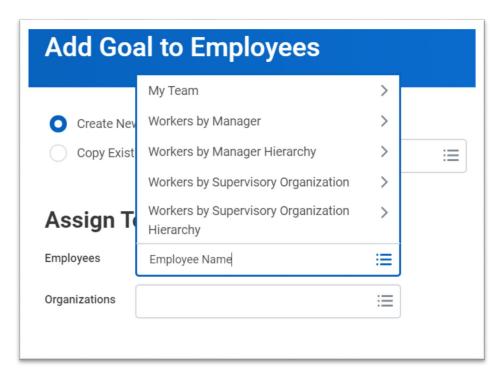
- Navigate to Add Goal to Employees either by:
 - clicking on the **Add Goal to Employees button** in the inbox item or
 - o searching for **Add Goal to Employees** in the Workday search bar or
 - o accessing **Add Goal to Employees** in the Team Performance Worklet
- Select Create New Goal





TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

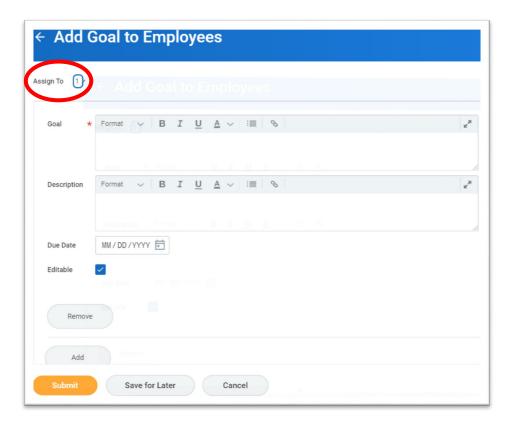
- Select who the goal will be **Assigned To.**
 - Type the employee's name in the Employees field or select the employee's name from the My Team list
 - You may select multiple employee names if you are assigning the same goal to multiple people.
 - You may choose an entire department by searching in the Organizations field.



MANAGER: ADD GOAL DETAILS

The **Assign To** header confirms who the goal will be assigned to. Click on the number to see the employee's names.

- Add the name of the goal in the Goal field
- Add a description in the **Description** field
- Add a Due Date
- Editable should remain checked
- Click Add to add another goal or Submit to proceed

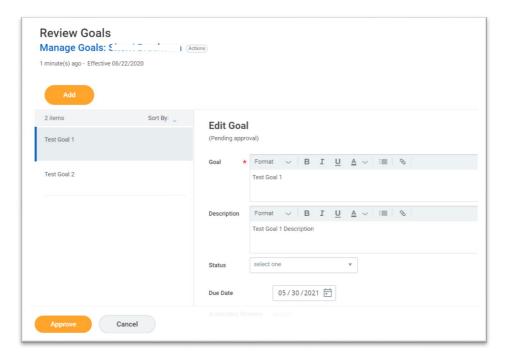


G (

TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

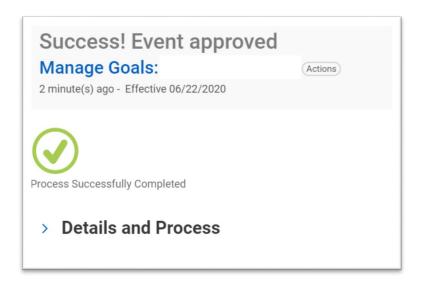
EMPLOYEE: REVIEW GOALS

- Review Goals
- Make edits, if needed
- Add Status, as desired
- Alternate between multiple goals on the left-hand side
- Click Add to propose a new goal
 - o Add the name of the goal in the Goal field
 - Add a description in the Description field
 - o Add a Due Date
 - o Editable should remain checked
- Click Approve



MANAGER: APPROVE GOALS

- Review Goals
- Click Send Back, if needed, to send back to the employee. Comments are required.
- Make edits, if needed
- Add Status, as desired
- Alternate between multiple goals on the left-hand side
- Click Add to propose a new goal
 - o Add the name of the goal in the Goal field
 - Add a description in the Description field
 - o Add a Due Date
 - Editable should remain checked
- Click **Approve.** Goals are now final.



 Click Submit on the Prepare to Cascade Next Year's Goals task in your Workday inbox.

Note: For probationary employees, you will receive this task after the 6 and 9-month evaluations. If you are not adding more goals, simply click Submit.

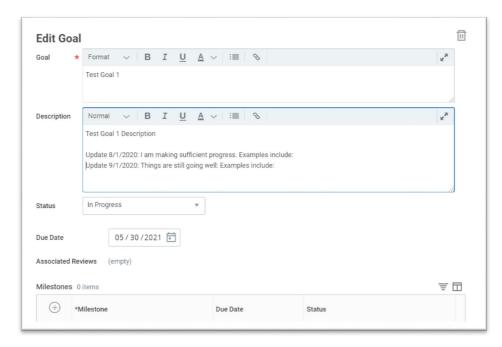
G (

TRAINING GUIDE – ADMINISTRATORS' ASSOCIATION GUIDE TO GOALS

EMPLOYEE: UPDATE GOALS

Throughout the year, an employee may choose to add progress updates to the goal. These updates may assist the employee and manager in providing a rating during next year's evaluation process.

- Navigate to **My Goals** either by:
 - o Searching for My Goals in the Workday search bar or
 - o Accessing **Goals** in the Performance Worklet
- Alternate between multiple goals on the left-hand side
- Click Edit
- Enter updates in the **Description** field. Include the date of the update.
- Milestones break a large goal down into manageable action items.
 These are optional. Add as desired.



• The updates are routed to the manager for approval.

MANAGER: APPROVE UPDATES

- Click on the Goal on the left-hand side
- Read the updates
- Approve or Send Back

