Managing an Employee’s Goals

The Goals form provides a collaborative area for you and your employee to create and track progress on the goals that your employee will focus on during the review period. In this guide, learn how to cascade, add, edit, delete, and/or monitor the goals on your employee’s goal plan. Your employee’s goals will be visible to you after they have been entered by the employee in the Goal Plan.

Setting Your Goals

To set your own goals, please click here to access the Goals (for Employees) Quick Reference Guide. Please note, it is recommended that you set and share your goals with your employees prior to having employees draft their goals.

Viewing your Employee’s Goals

The Employee Hierarchy can be used to view other employees’ public goals, both up and down your hierarchy, to ensure goal alignment within the team and organization.

As a manager, you can also view and manage all of your employees’ private goals. Click a name in the hierarchy to view that employee’s goals. Note that goals default to “private” status. If an employee prefers to create “public” goals, they may do so with your approval.

Evaluating Employee Goals

You can review either your employee’s Goal Plan or Development Plan. For JHU employees, check to see that your employee has created at least one goal in each of these three categories (JHHS employees should only use the Goals and Professional Development categories):

- **Goals**: These appear on the Goal Plan and are the priority outcomes or results that you want to accomplish during the upcoming review period. Make sure that these goals are aligned to your department’s goals.

- **Major Responsibilities (JHU Only)**: These appear on the Goal Plan and are the ongoing job requirements and duties that are included in your job description. If these duties were not performed, it would severely impact the nature of the job.

- **Professional Development**: These appear on the Development Plan, and are the steps that your employee would like to take to enhance job-related skills and capabilities.
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Check to see that the weighting for the Goals and Major Responsibilities has a combined total weight of 100%. Evaluate each Goal and Major Responsibility item to ensure they include SMART components and the weighting accurately reflects the level of importance or priority. If any changes or edits need to be made to your employee’s Goals or Major Responsibilities, you can let your employee know or you can edit them yourself.

Commenting on Goals

Managers and employees have the ability to engage in back-and-forth commenting directly on the Goal Plan. Enter notes in the “Comments” field and click “Post.” Once a comment is posted, it is immediately visible to the other party. Managers and employees can edit and delete their comments. At this time, any comments that are entered on the Goal Plan do not appear on the Performance Form.

Adding Employee Goals

You can add goals to your employee’s plan. To add a new goal, click Add New in the upper right corner of the screen, then select one of the following:

- Click Create a New Goal to add a goal with custom metrics or select a goal with predefined metrics from the Goals Library.
- Click Goal Wizard to step through the process of creating a SMART goal. A new window will open to guide you.
- If you have used myPerformance for more than one year, you can also copy goals from a prior year’s goal plan. Click Copy From Other Goal Plan and select the year you wish to copy. Select the goals you want to copy; you can then update or edit them.
- You can Cascade your goals to an employee. The employee would then inherit your goal in their individual goal plan. Goals that have been cascaded can be edited once they are in the employee’s plan to indicate how the employee will contribute to the shared goal.
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Add Goal

Click **Create a New Goal** and then select **Add Goal** to create a goal with custom metrics. A new window will open; complete the sections as described below:

- **Visibility**: You may choose for your employee’s goal to be public or private (default). Be aware that a private goal is not a personal goal; it is still visible to you. If a goal is public, then it is visible to any employee.
- **Category**: Every goal must be assigned to a category. Goals is the default, but JHU employees may also choose Major Responsibilities.
- **Goal Name**: Type in the name of the goal.
- **Goal Description**: Type in the goal description.
- **Weight**: Enter a percent to indicate the goal’s relative importance to other objectives on the Goal Plan. Your goals will be automatically calculated so you can see when they add up to 100% on the goal plan.
- **Start/Due Date**: Enter the dates that the goal is to start and be completed by.
- **Tasks**: Use this to add sub-tasks to help you track progress on the goal.

Please note that the **Goal Name** field is required (indicated by the red asterisk). Click **Save Changes** to save the goal and return to the Goal Plan.
Add Library Goal

The **Goal Library** assists with writing goals by providing templates with suggested content and metrics. To use the Goal Library, follow these steps:

- Click **Create a New Goal**.
- Click **Add Library Goal**.
- Use the folders to browse functional job areas and review the sample goals provided in the goal library.
- Click a check box and click **Add Selected Goal** to select an objective.
- The Goal Library pre-populates the Add Goal window with suggested content, which can be edited as needed.
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Goal Wizard

Use the Goal Wizard to help you write SMART objectives. From the Add New dropdown menu in the top right corner, click Goal Wizard to step through this process.

- Select the Category for the goal (Goal or Major Responsibilities).
- Type the name of your goal and then click Next.
- Enter how you will measure this goal, then click Next.
- Is this goal attainable? Select the Yes or No checkbox. If no, click Back to modify the goal. Click Next.
- Is this goal relevant? Select the Yes or No checkbox. If no, click Back to modify the goal. Use the drop-down menu to select Goal Alignment, if any. Click Next.
- Enter the dates that the goal is to start and be completed by, then click Next.
- Select Add More Details to add additional information. You are required to enter a goal weight (how much this goal contributes to your overall annual rating), and you will do that by selection Add More Details. When you are finished, select Save & Close.
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Editing Employee Goals

After a goal has been added to your employee’s Goal Plan, it may be edited by you or your employee if changes are needed.

- Click **Edit** next to the goal title on the Goal Plan to edit the goal. The Edit Goal window will appear and you can change any aspect of the goal in the same way that you entered the goal originally.
- Click **Save Changes** to save the goal and return to the Goal Plan.

Goal Actions

- Select the gear icon to display the **Actions** dropdown menu.
- To link a goal with another employee’s goal, select **Link to another Employee’s goal**, and then select the employee to whom you want to link the goal. Those two employees will then share the goal and can track progress together.
- Other functions available from the Actions menu include:
  - View goal detail
  - Delete a goal (note that goals can only be deleted from the goal plan; not from a Performance Form)
  - Move goals up or down in the form
  - Indent or outdent goals

Deleting Employee Goals

To delete a goal from your employee’s Goal Plan:

- Select the action icon to display the **Actions** dropdown menu.
- Select **Delete goal**.
- Click **Ok** in the text box to delete the selected Goal(s) from the Employee’s goal plan or
- To keep the goal, click **Cancel**.
- Click on the box next to the goal to deselect the goal.

Please discuss any goal changes with the employee prior to making and changes or deletions.
Cascading Goals
You can cascade or link your goal to your employees, which means that the employee will inherit some of your goals. These goals can be edited once they are on the employee’s Goal Plan to reflect how the employee will support or contribute to the goal.

- Click the box next to the goal you wish to cascade or link.
- Select Cascade from the upper right corner of the screen.
- Click the box next to the employee(s) you wish to select, then click Next.

Display Options
Select Display in the upper right corner to change the information displayed on your Goal Plan by checking or unchecking boxes and clicking the Update button.