



# **Faculty as Manager in Performance Management: Goal Setting**

# Manager's Functions: Cascading Team Goals



This guide covers setting your team's goals. Due to your union affiliation as a Faculty Manager, you will NOT have a goal plan to do a self assessment, create your own Development or Performance goals.

While you should have an identified manager to support the up-flow of data, you will not be receiving goals from them or have the ability to cascade goals down to your team.

After selecting your team members, and they join your team, you will be able to click on their name to enter their goal plan and assign individual development and performance goals.

You will have all other functions of a manager.

# Goal Setting: Assigning Individual Employee Goals

★
Employee 1 – FY2020
1

Submit for Approval
Assign Goal to Team
Request Update to Manager

Due Date	Manager	Status	Goal Plan Started Date	Goal Plan Submitted Date	Goal Plan Approved Date
3/23/2019	Manager 1	Not Started			

Not Started
In Progress
Past Due
Submitted
Requires Modification
Approved

+ Approval History (0)

× Initial Self Assessment

Professional					2
<span style="color: red;">×</span> Leading Change <span style="float: right;">No Value Selected</span>	<span style="color: red;">×</span> Leading People <span style="float: right;">No Value Selected</span>			<span style="border: 1px solid gray; padding: 2px 5px;">Edit</span>	
<span style="color: red;">×</span> Leading Performance <span style="float: right;">No Value Selected</span>	<span style="color: red;">×</span> Technical/Occupational Acumen <span style="float: right;">No Value Selected</span>			<span style="border: 1px solid gray; padding: 2px 5px;">Edit</span>	

× Development Goals 3

+ Goal
Edit

No development goals have been created

× Performance Goals 4

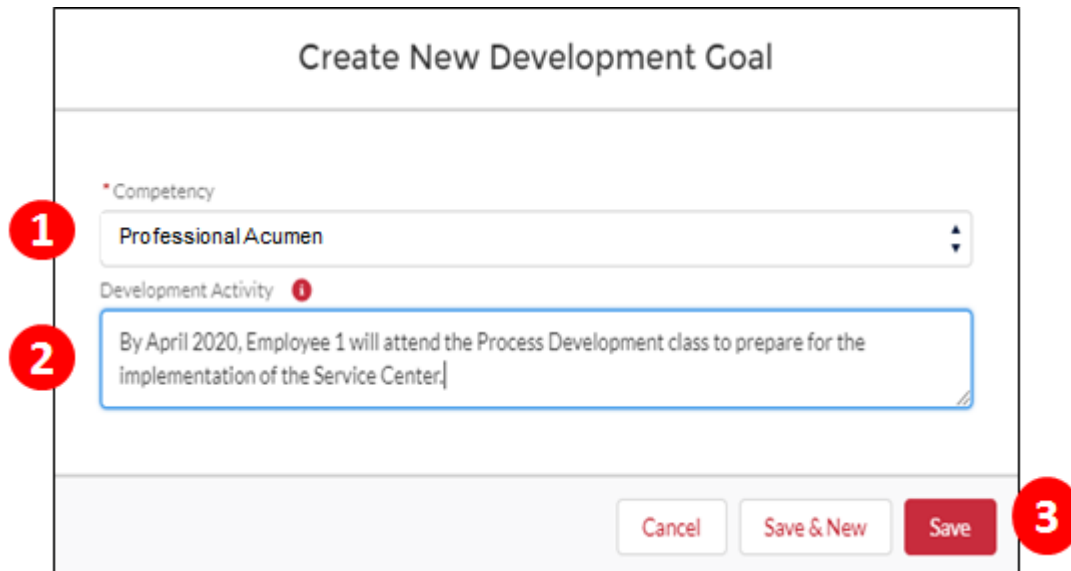
+ Goal
Edit

No performance goals have been created

## Process

1. Ensure that you are accessing the employee's goal plan by verifying the name next to the **star**
2. Notice that the manager **cannot** update the employee's self appraisal
3. Assign a **Development Goal** to the employee by clicking the **+Goal** button to create a new goal (see next page)
4. Assign a **Performance Goal** by clicking the **+Goal** button to create a new goal (see the page following the next)

# Goal Setting: Assigning Employee Development Goals



Create New Development Goal

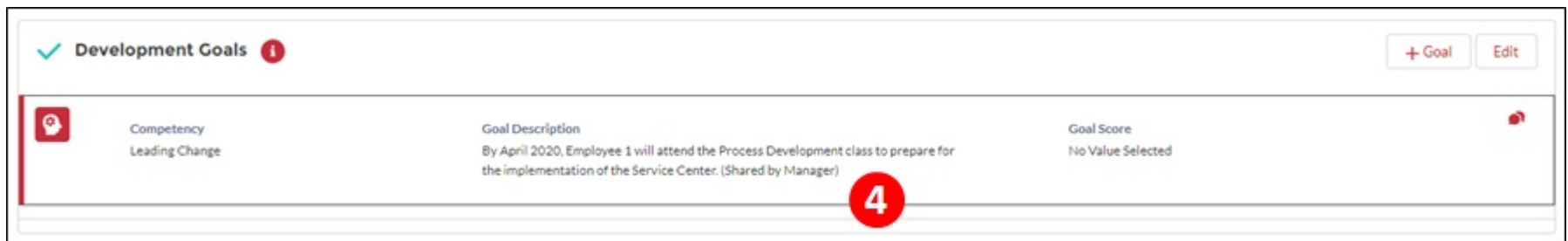
\* Competency  
Professional Acumen

Development Activity ⓘ  
By April 2020, Employee 1 will attend the Process Development class to prepare for the implementation of the Service Center.

Cancel Save & New Save

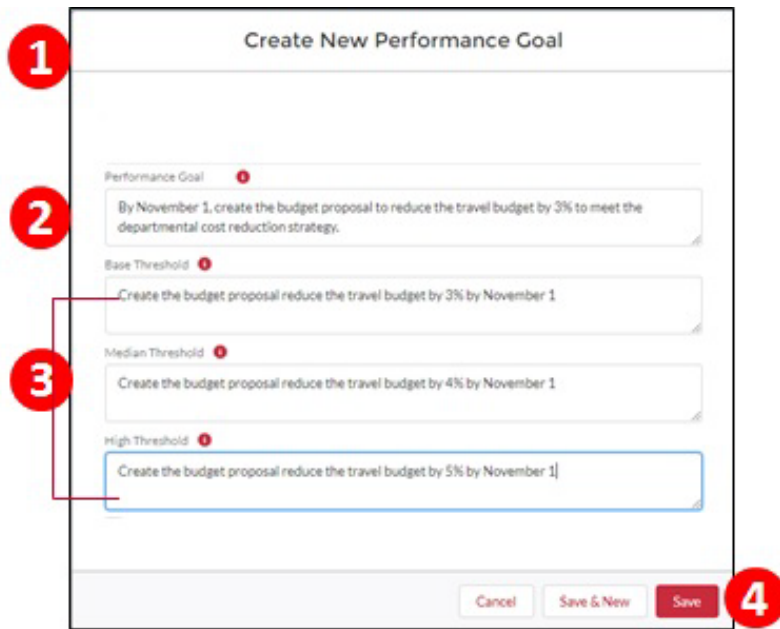
## Process

1. Populate the employee's **Development Goal** by selecting the appropriate competency from the Competency dropdown menu
2. Populate the **Development Activity** with the Development Goal
3. Click **Save** to record your entry
4. Identify that the Development Goal has been assigned by verifying that the goal description include the text **(Shared by Manager)**



Competency	Goal Description	Goal Score
Leading Change	By April 2020, Employee 1 will attend the Process Development class to prepare for the implementation of the Service Center. (Shared by Manager)	No Value Selected

# Goal Setting: Assigning Employee Performance Goals



**1** Create New Performance Goal

**2** Performance Goal ⓘ  
By November 1, create the budget proposal to reduce the travel budget by 3% to meet the departmental cost reduction strategy.

**3** Base Threshold ⓘ  
Create the budget proposal reduce the travel budget by 3% by November 1

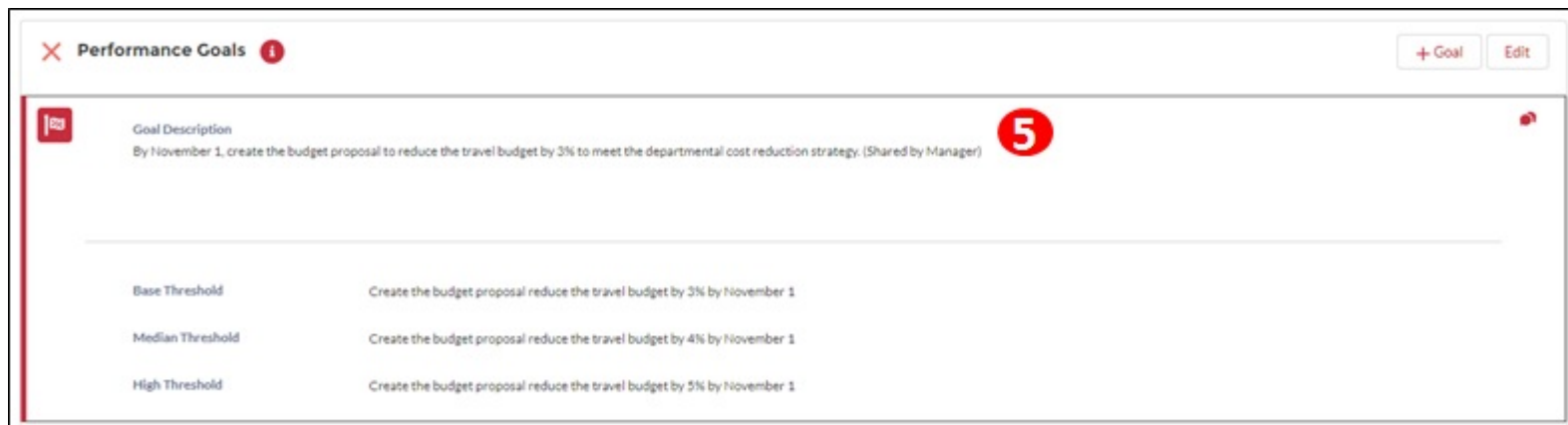
Median Threshold ⓘ  
Create the budget proposal reduce the travel budget by 4% by November 1

High Threshold ⓘ  
Create the budget proposal reduce the travel budget by 5% by November 1

**4**

## Process

1. **All Goals** are visible by your manager's manager and up the reporting structure
2. Populate the **Performance Goal** field
3. Populate the three associated **Thresholds**
4. Click the **Save** button to capture your entries
5. Identify that the **Performance Goal** has been assigned by verifying that the goal description include the text **(Shared by Manager)**



× Performance Goals ⓘ + Goal Edit

**5** 📄 Goal Description  
By November 1, create the budget proposal to reduce the travel budget by 3% to meet the departmental cost reduction strategy. (Shared by Manager)

Base Threshold Create the budget proposal reduce the travel budget by 3% by November 1

Median Threshold Create the budget proposal reduce the travel budget by 4% by November 1

High Threshold Create the budget proposal reduce the travel budget by 5% by November 1

Next Review: Manager's Function Clip 3

## **The Approval Process**