

Defining Annual Goals & Development Plan



The on-line form in ePerformance is to be completed by the Employee for review and discussion of draft goals with the Manager prior to finalizing in the system before year-end.

Information regarding **Job Title**, **Document Type**, **Status**, **Manager**, **Period**, **Document ID** and **Due Date** are pre-populated from Mosaic at the beginning of the year, and are all visible at the top of the **Define Goals** section. The **Due Date** for completing the Define Goals section is listed on the left hand menu.

TIP: Goals should similarly be reviewed and/or updated when an employee returns from a leave, undergoes a significant role structure change or takes on a new role within the University.

Define Goals

Annual and Development goals can be added to the ePerformance document. As a Best Practice, it is recommended that 4-6 Annual Goals and 1-2 Development Goals are listed.

1. To add a goal to your document, click the **Add Item** link.
2. Click the “**Add your own item**” radial button.
3. Click the **Next** button.
4. Fill in the various text boxes as described:
 - **Title and Description** – information about the goal itself
 - **Action Plan and Key Measures** – the steps in how the goal will be accomplished and a description of what success looks like
 - **Progress Updates** – key accomplishments and updates noted throughout the year

Optional details:

 - **Goal Type** – to identify the nature of the goal
 - **Status** – can be updated as activities progress throughout the year
 - **Weight** – assists in priority setting
 - **Due Date** – to illustrate when the goal should ideally be achieved; allowing for project and program flexibility outside of year-end timeframes
5. Click on the “**Add**” button.

Google Chrome is the recommended browser to use with this program.

6. Click the **pencil icon** to update or modify any of the fields. To delete a goal from your document, click the **Trash can icon**.

You can Save Drafts while working through the goals process, and edit as required before sharing with your Manager.

After you have finished identifying goals for the year, have a conversation with your Manager to review everything. Plan to meet regularly throughout the year and capture progress updates directly in the system. Goals can be edited throughout the year to reflect any changes and/or progress made. Final approval will be provided by the manager just prior to year-end.

Always remember to Save (Top Right Hand Corner) after you Update (At the Bottom), and before Sharing.

TIP: You can now continue to document and save changes and progress updates throughout the year directly in ePerformance.

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