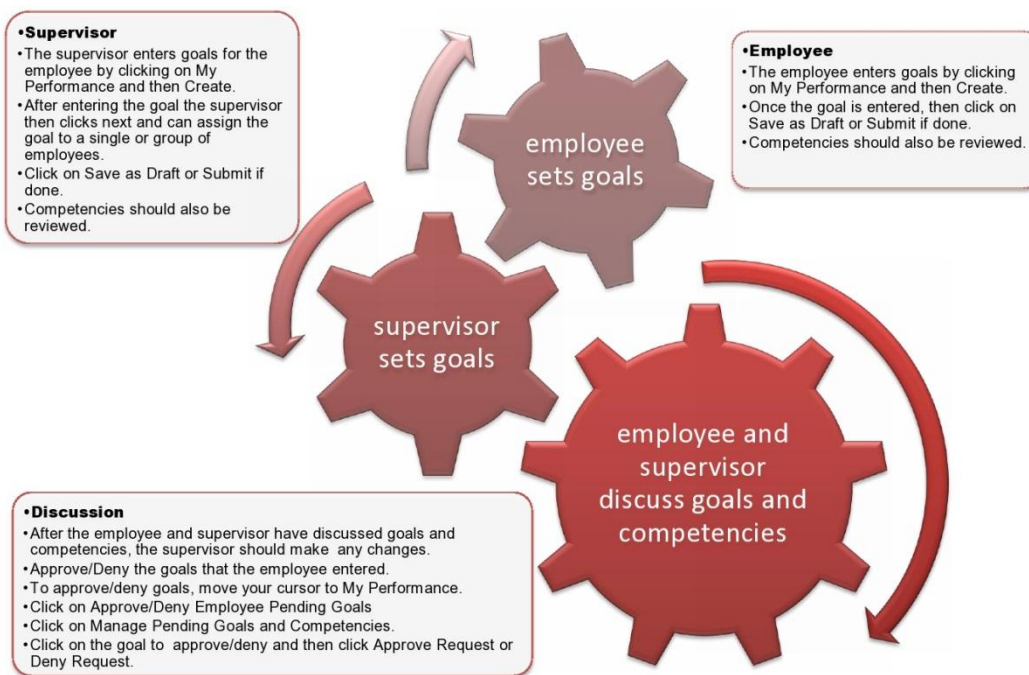


Goal Setting in Performance

Development for Employees



Steps to goal setting and competency review for employees.

1. Enter goals for the review year.
2. Review competencies and add any comments.
3. Submit goals to your supervisor for approval.
4. Meet with your supervisor to discuss goals that you both have set and review competencies.

Complete this process by November 30.

Go to the internet and enter www.bates.edu/hr/performance. Click on Access Performance Development ONLINE

The screenshot shows a web browser window displaying the Bates College Human Resources Performance Development page. The browser's address bar shows the URL <http://www.bates.edu/hr/performance-development/>. The page features a navigation menu with links for Academics, Campus, Admission, Alumni, and Parents. Below the navigation, the main heading reads "Bates Human Resources". A secondary navigation bar includes links for About, Benefits, Employment, Health & Safety, Payroll, Performance Development, Programs, Wellness, Reference, Forms, and Contact. The main content area is titled "Performance Development" and includes a link to "Access Performance Development ONLINE", which is highlighted with a blue arrow. Below this, there is a section titled "Guiding Principles of Performance Development" with a list of principles. On the right side, there is a "Contact Us" section with contact information for Human Resources and a "News & Updates" section with a small image and text.

Log in with your network (email) username and password.

The screenshot shows a web browser window displaying the Bates College Federated Authentication Service login page. The browser's address bar shows the URL https://idp.bates.edu/ssp/module.php/core/loginuserpass.php?AuthState=_0b61283514705ee174c49453cxl159d068ab180e13%3Ahttps%3A%2F%2Fidp.bates.edu. The page features a navigation menu with links for Cyber Recruiter, Surveys Online - CUPA, Commons, Clients, Ellucian Customer Support, ellucian Learning Center, and Cornerstone Client Success. Below the navigation, the main heading reads "Bates Federated Authentication Service". The main content area is titled "Enter your Bates username and password" and includes a message: "A service has requested that you authenticate yourself. Please enter your Bates username and password." Below this message is a login form with fields for "Username" and "Password", and a "Login" button. Below the login form, there is a section titled "Help! I don't remember my password." with a message: "If you have lost or forgotten your Bates network password please contact Help Desk Services at ext 8222. If you know your password but would like to change it please use the Password Manager: https://pwdmgr.bates.edu".

This is your Welcome screen where there are basic instructions. To begin, click on the My Performance tab.

Bates Performance Development

Welcome | **My Performance** | Reports | Admin | Content | FAQs

Melani, welcome to Performance Development

IMPORTANT INFORMATION

It is time for goal setting. We encourage you to take responsibility for actively communicating with your supervisors about planning your goals, being accountable for your actions and accepting feedback and support. Goal Setting, Competency review and the discussion between the supervisor and employee must be completed by **November 30**.

Supervisor

- The supervisor enters goals for the employee by clicking on My Performance and then Create.
- After entering the goal the supervisor then clicks next and can assign the goal to a single or group of employees.
- Click on Save as Draft or Submit if done.
- Competencies should also be reviewed.

employee sets goals

Employee

- The employee enters goals by clicking on My Performance and then Create.
- Once the goal is entered, then click on Save as Draft or Submit if done.
- Competencies should also be reviewed.

You will see this screen that has your core competencies and job family competencies, as well as goals that your supervisor has entered, or goals continuing from last year listed here. As you enter goals, they will also appear here.

Bates Performance Development

Welcome | My Performance | Reports | Admin | Content | FAQs

Goals & Competencies - Melani McGuire

Create Reports

Select From: 8/1/2013 To: 7/31/2014 Show Cancelled Hide Completed Search

My Goals & Competencies

Title	Due Date	Perspective	Status	Options
1. Support for the Mission, Vision and Community Principles of Bates College	7/31/2014	Core Competency	On Track	[Icon] [Icon] [Icon]
2. Knowledge and Performance of Job Responsibilities	7/31/2014	Core Competency	On Track	[Icon] [Icon] [Icon]
3. Leadership and People Management	7/31/2014	Job Family Competency-Managerial	On Track	[Icon] [Icon] [Icon]
4. Program and Project Management	7/31/2014	Job Family Competency-Managerial	On Track	[Icon] [Icon] [Icon]

To enter a goal click on Create.

The screenshot shows the 'Goals & Competencies - Melani McGuire' page. At the top, there is a navigation bar with 'Welcome', 'My Performance', 'Reports', 'Admin', 'Content', and 'FAQs'. Below this, there are 'Create' and 'Reports' buttons. A search bar is present with filters for 'From: 8/1/2013' and 'To: 7/31/2014'. The main content area is titled 'My Goals & Competencies' and contains a table with the following data:


Title	Due Date	Perspective	Status	Options
1. Support for the Mission, Vision and Community Principles of Bates College	7/31/2014	Core Competency	On Track	[Icons]
2. Knowledge and Performance of Job Responsibilities	7/31/2014	Core Competency	On Track	[Icons]
3. Leadership and People Management	7/31/2014	Job Family Competency-Managerial	On Track	[Icons]
4. Program and Project Management	7/31/2014	Job Family Competency-Managerial	On Track	[Icons]

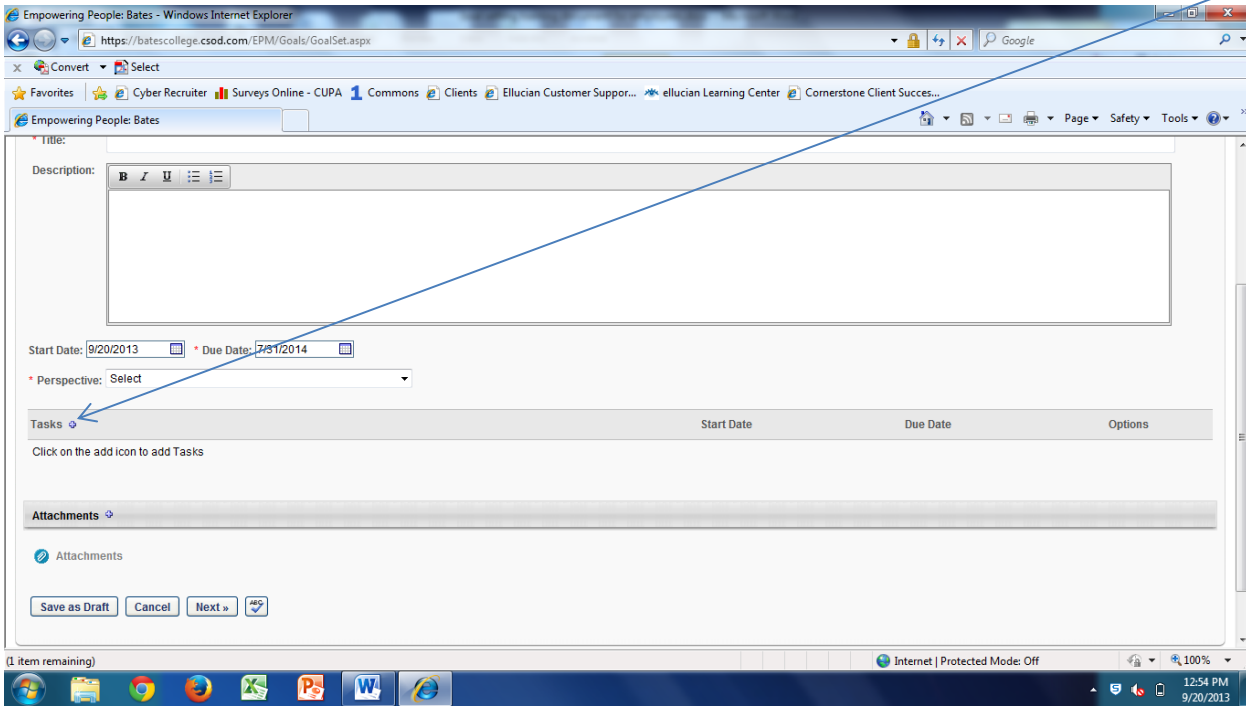
Enter the Title, Description, Start and Due dates. Click on the down arrow to choose the Perspective. The perspective will either be Departmental Goal for work in the department or Developmental Goal for personal development.

The screenshot shows the 'Create Goals & Competencies' form. It includes a 'Set' section with instructions: 'Enter goal details manually or import a goal using the SMART Wizard or the Library.' There are 'Wizard' and 'Library' buttons. The form fields are:

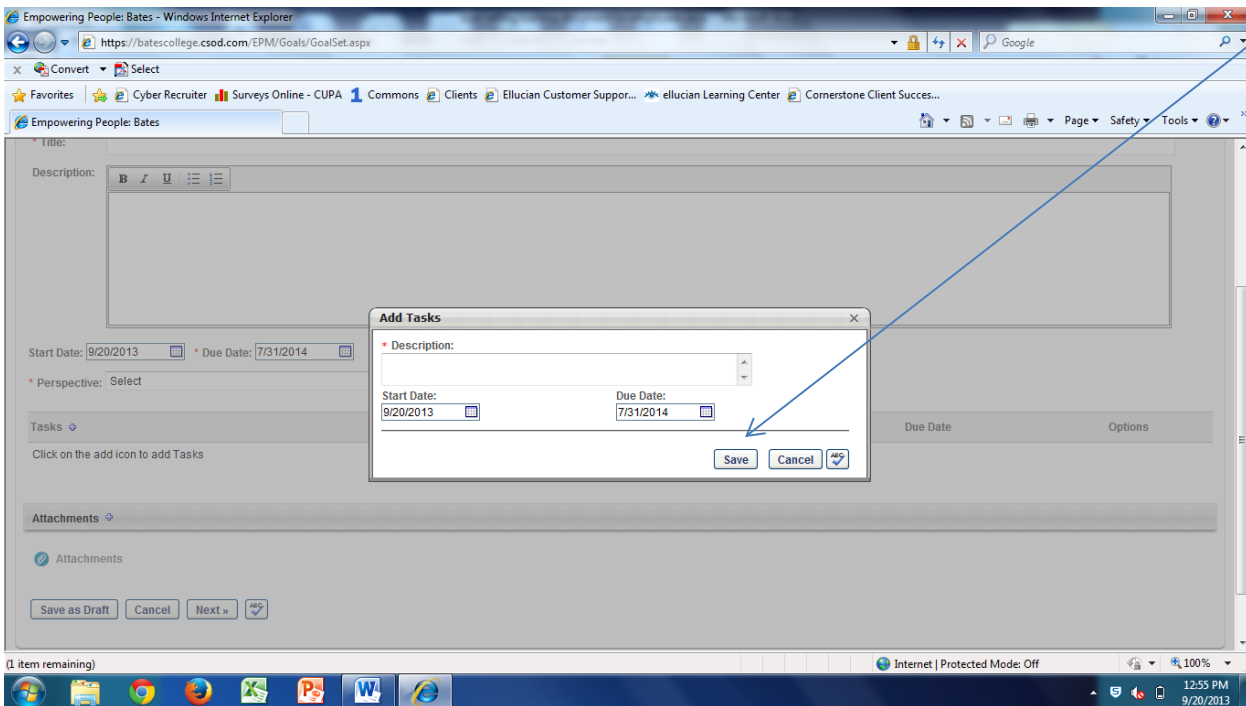
- Title: [Text input field]
- Description: [Rich text editor with bold, italic, underline, list, and link icons]
- Start Date: 9/20/2013
- Due Date: 7/31/2014
- Perspective: Select (dropdown menu)

Below the form, there are sections for 'Tasks' and 'Attachments'. The 'Tasks' section has a table with columns for 'Start Date', 'Due Date', and 'Options'. The 'Attachments' section is currently empty.

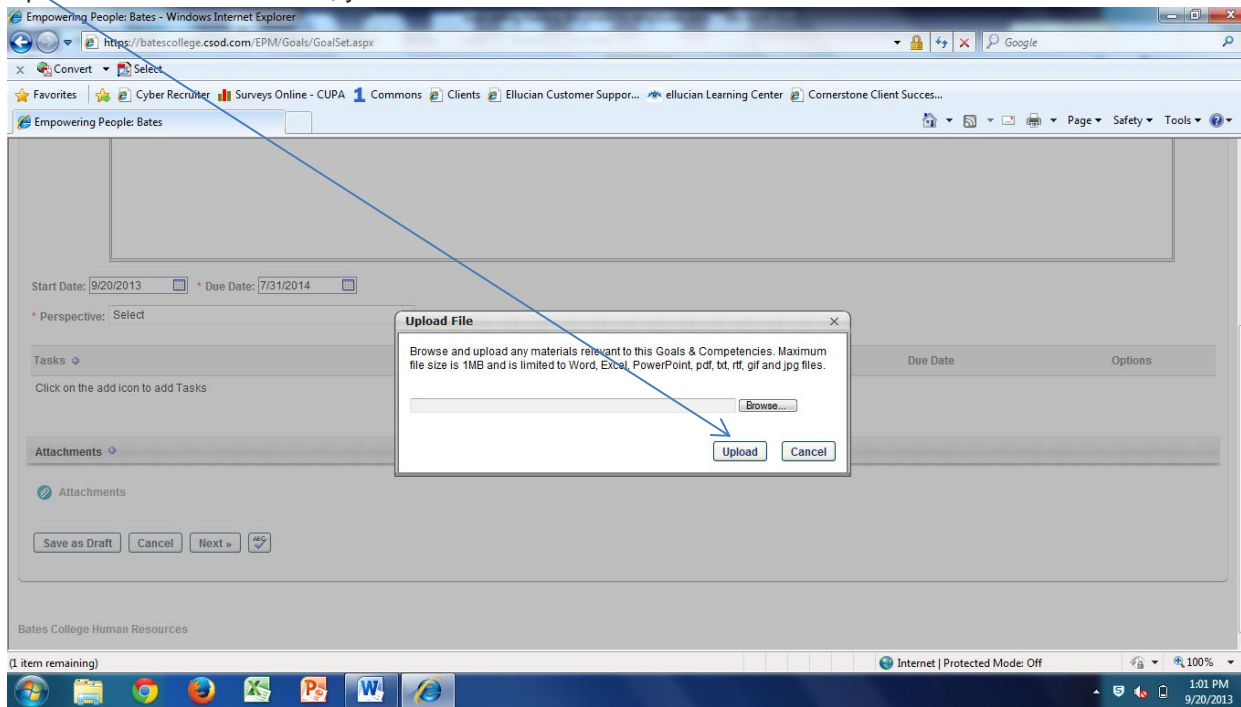
Some departments have the option of entering tasks and attachments for their goals. To enter a task(s) click on the  next to Tasks.



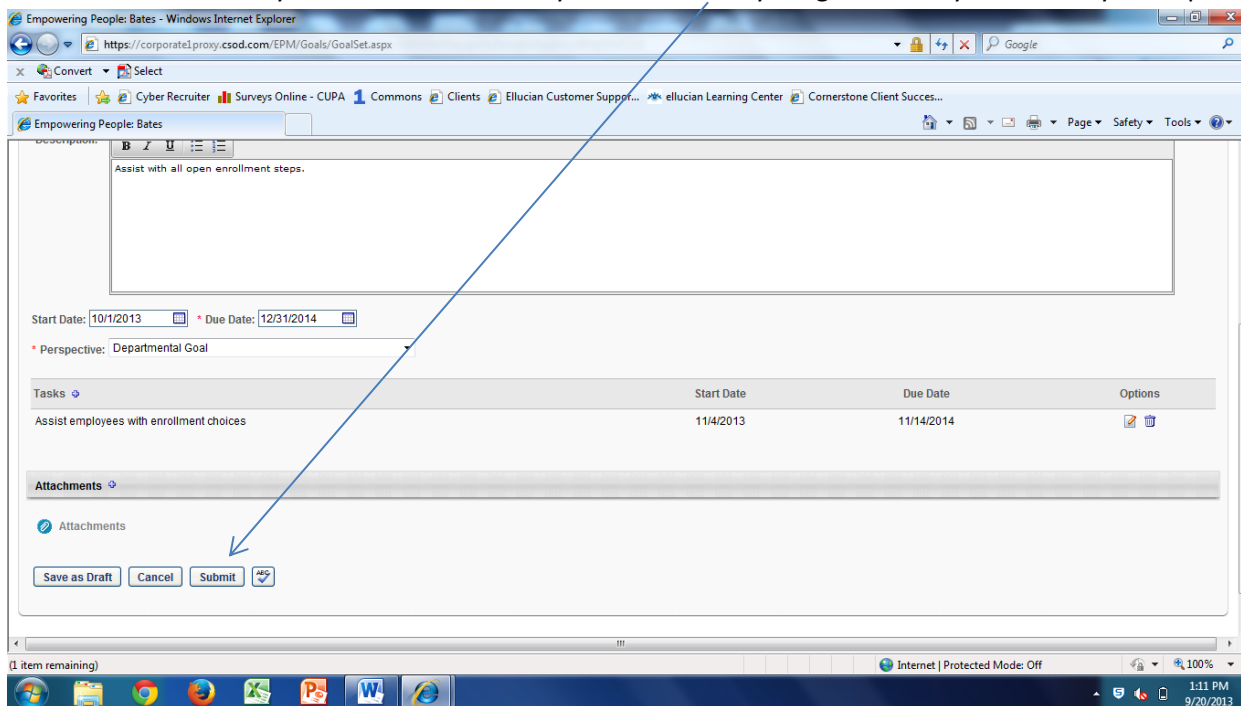
Here you can enter a description of a specific task in the goal with a Start and Due Date. When you are done, click Save. You can add as many tasks as you like repeating the same steps.



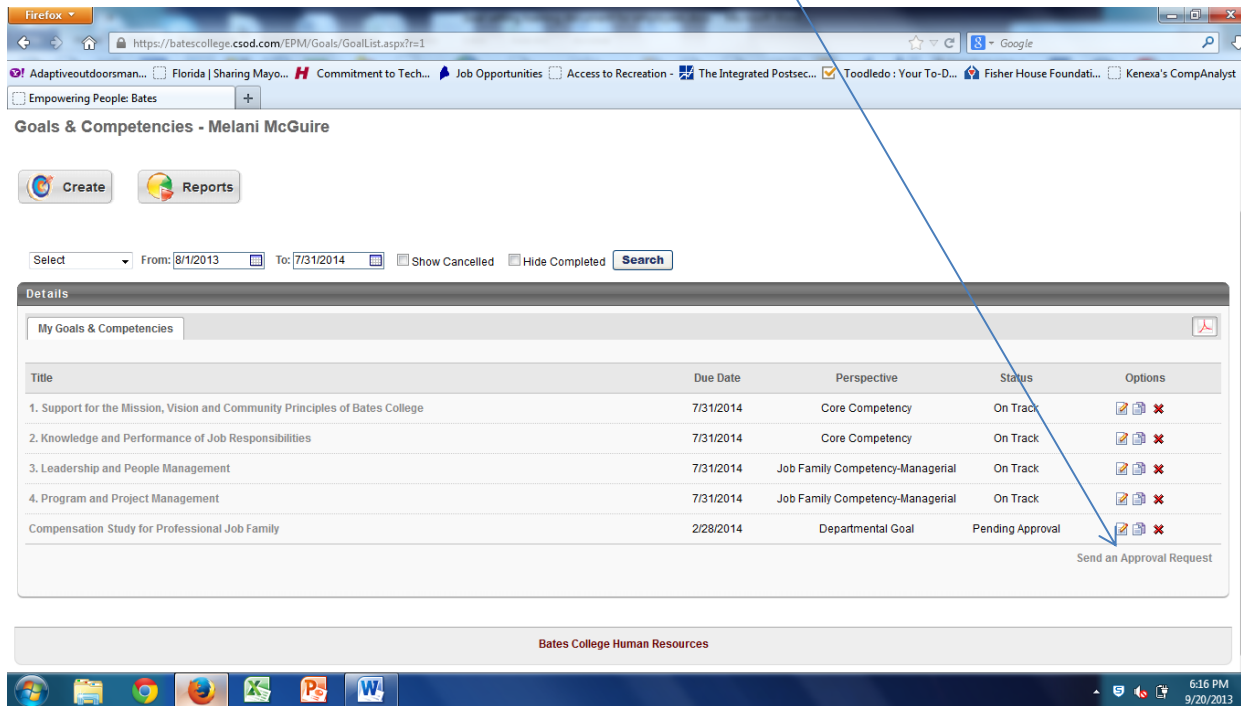
You may also add attachments to your goal setting, such as project plans or other documents. Be aware that these documents are only for the purpose of the current year's performance process. Once the current process is complete, any attachments will no longer be stored. If you would like to add an Attachment, click on the **+** next to Attachment. You will then get a pop up box that asks you to browse for the file you want to upload. When you have located it, click on Upload. When it is finished, you will see the title of the file.



When you are finished entering your goal, you can click on Save as Draft if you are not finished, Cancel if you wish to start over or Submit if you are finished. Once you click Submit your goal is ready to send to your supervisor for approval.

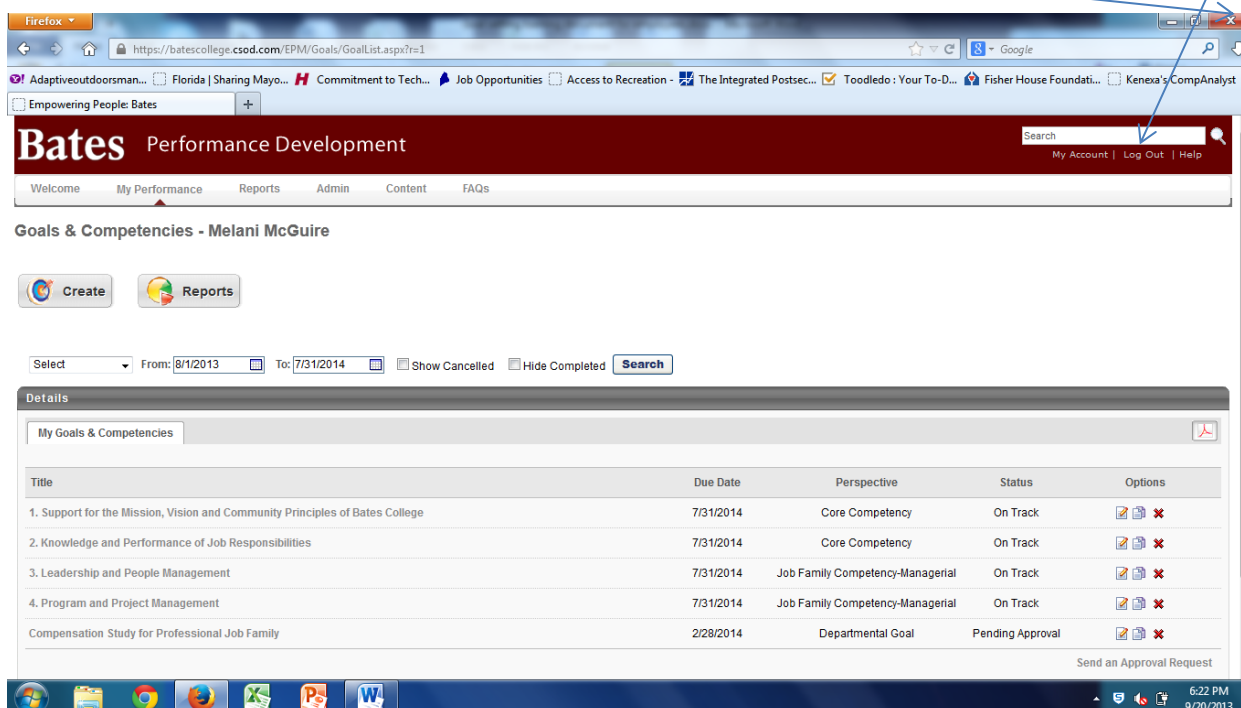


When you click Submit, it will return to the Goals and Competencies screen. If you are ready to send your goal(s) to your supervisor for their approval, click on Send an Approval Request.



A pop up window will ask “Do you wish to send an approval request email for all pending goals?” Click on Yes to send the request.

A second pop up window will confirm that an email was sent. Your supervisor will receive an email stating that there are goals waiting for them to approve. You can add more goals or if you are finished you can click on logout. Make sure to close your browser by clicking on the red x in the top right corner.



You can add comments to competencies or edit goals by clicking on the edit icon on the right of the particular goal or competency that you would like to edit.

Goals & Competencies - Melani McGuire

Create Reports

Select From: 8/1/2013 To: 7/31/2014 Show Cancelled Hide Completed Search

Title	Due Date	Perspective	Status	Options
1. Support for the Mission, Vision and Community Principles of Bates College	7/31/2014	Core Competency	On Track	
2. Knowledge and Performance of Job Responsibilities	7/31/2014	Core Competency	On Track	
3. Leadership and People Management	7/31/2014	Job Family Competency-Managerial	On Track	
4. Program and Project Management	7/31/2014	Job Family Competency-Managerial	On Track	
Compensation Study for Professional Job Family	2/28/2014	Departmental Goal	Pending Approval	

Send an Approval Request

Bates College Human Resources

6:47 PM 9/20/2013

You can add comments to a competency or goal by clicking on the + next to comments.

Start Date: 8/1/2013 Due Date: 7/31/2014

Perspective: Core Competency

Tasks

Click on the add icon to add Tasks

Attachments

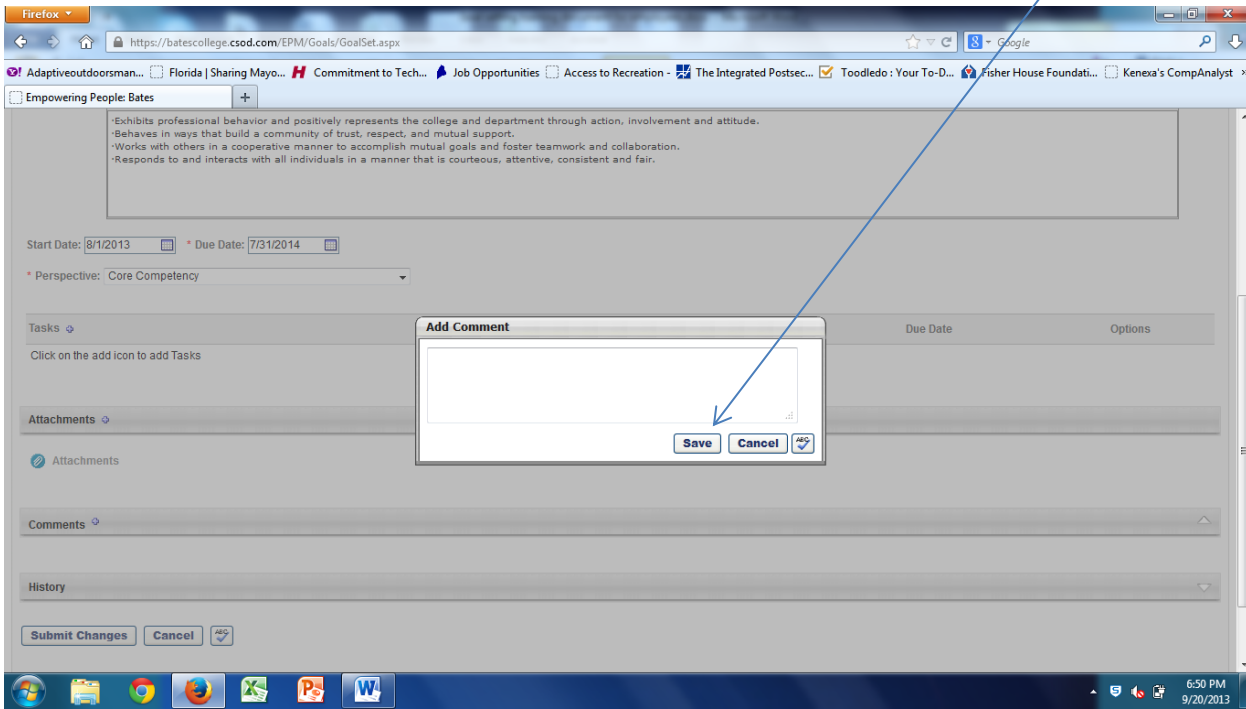
Comments

History

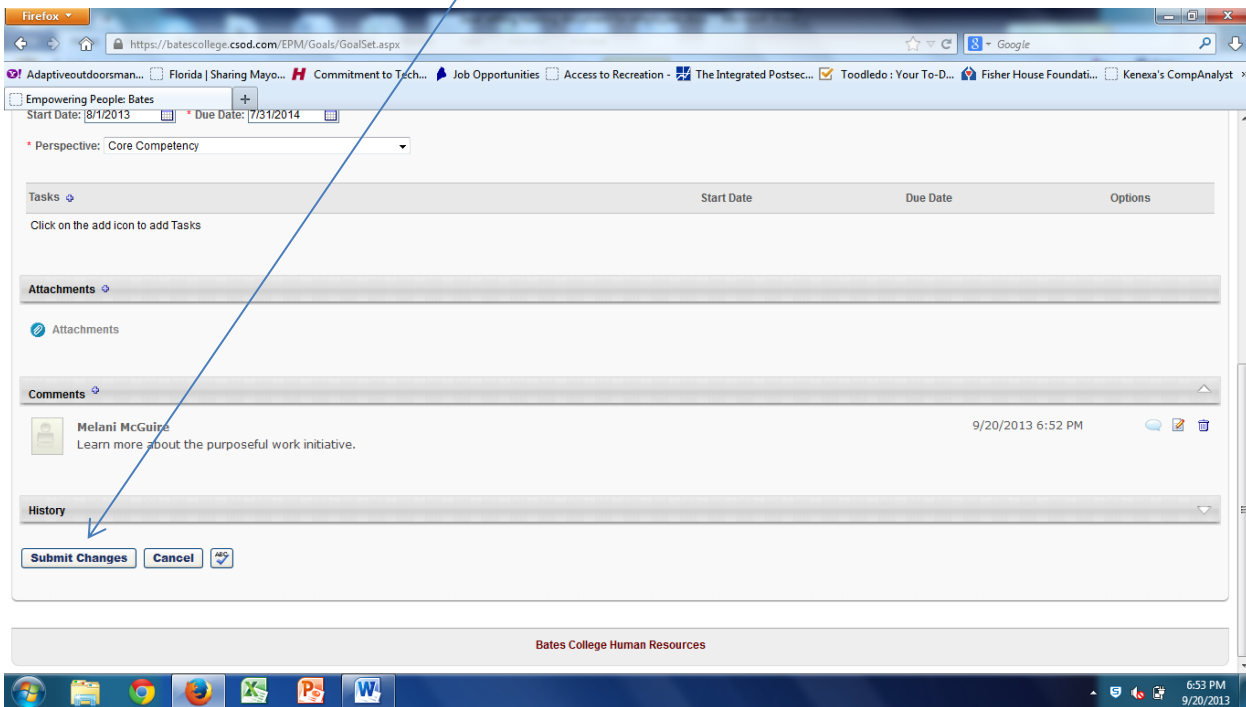
Submit Changes Cancel

6:48 PM 9/20/2013

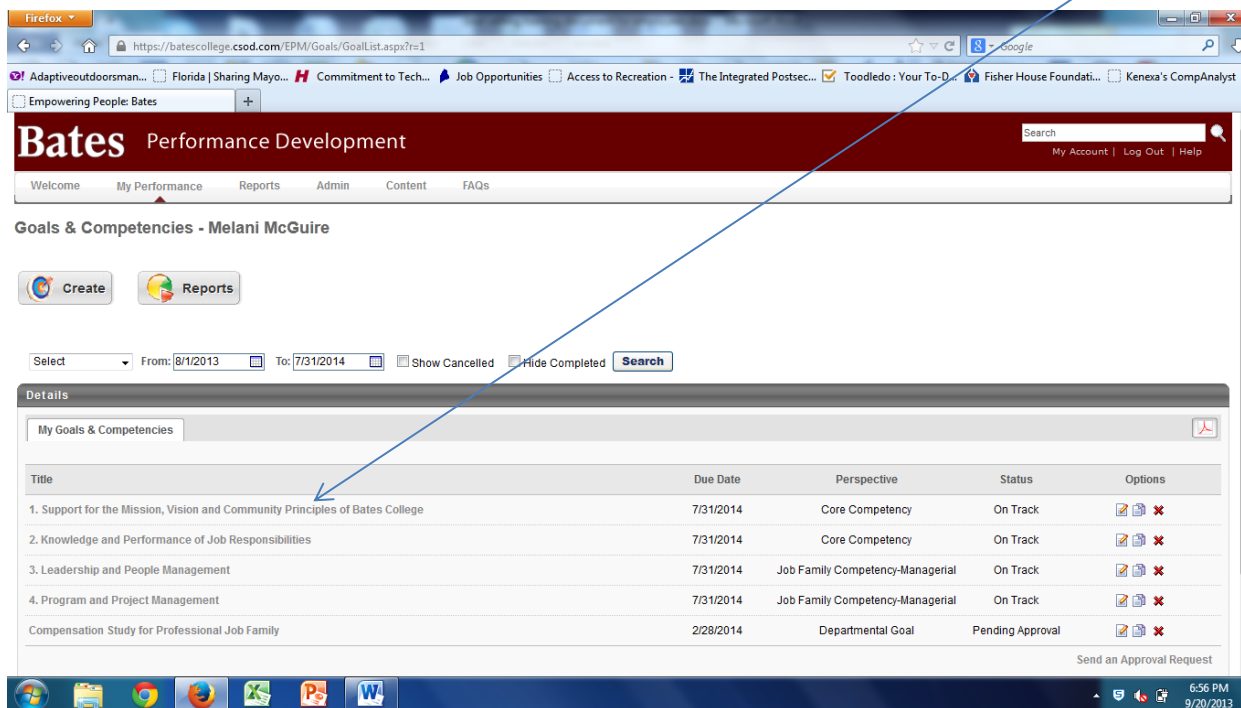
A pop up box will appear where you can enter your comment. When finished, click Save.



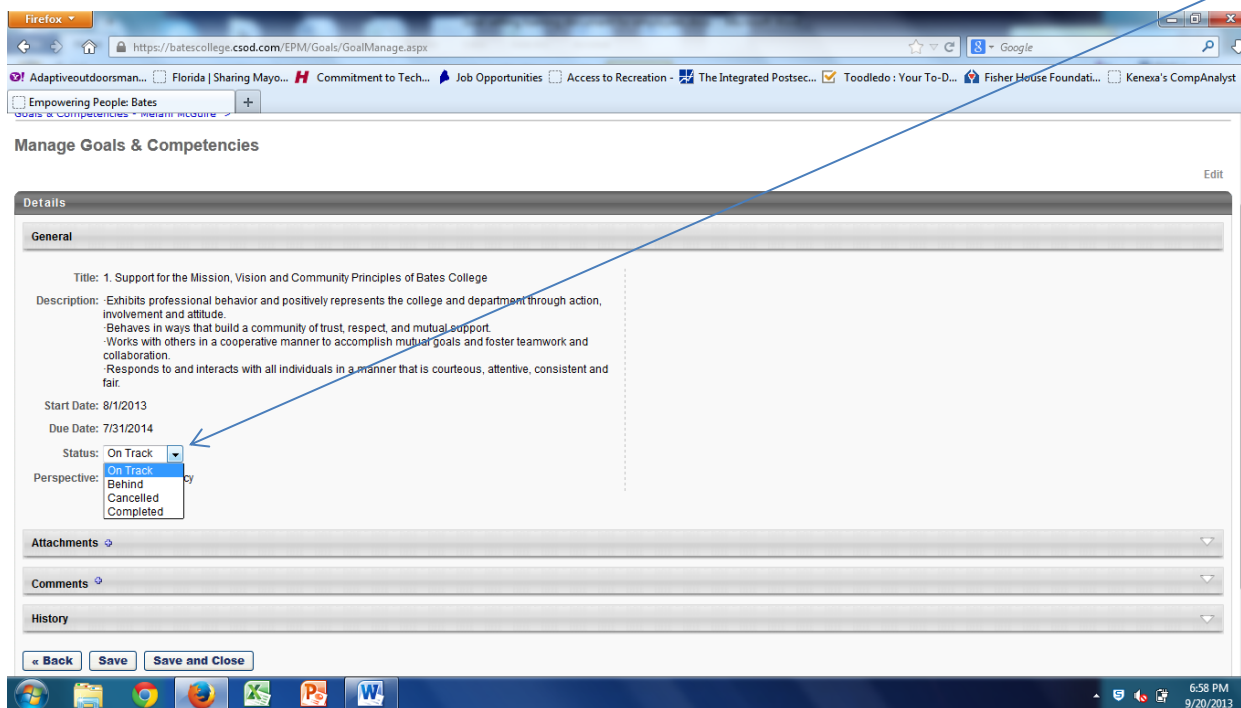
When finished, click on Submit Changes.



During the year, you can record the progress of your goal or competency by clicking on the title.



You can change the progress of the goal by clicking on the down arrow next to Progress and choose the status.



Click on Save and continue working or if finished click on Save and Close. Your supervisor will receive an email each time you submit, change or cancel a goal. You have now finished entering goals and reviewing the core and job family competencies. Your supervisor will also enter goals and review competencies for your performance. Once you are both finished, the next step is to have a discussion concerning your goals and competencies so that the expectations for performance are clearly understood by both you and your supervisor.