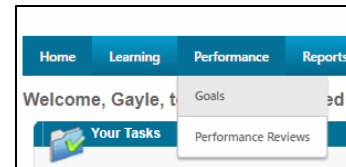


Updating Goal Progress throughout the year.

- Make a plan to routinely visit your myPLAN goals and update progress. Add dates to your Outlook calendar to remind you to log in and update.
- Managers should also routinely comment on employees' goal progress. A good practice is to first have a conversation and then summarize it in the comment thread.

To access goal commenting, go to the Goals section under the Performance tab. (Managers select the "My Team" tab to see employees' goals. Click the expand bracket (">") to see each employee's goals.)



Below is a screenshot of the goal progress tools with a guide to goal-writing written into the goal content sections.

A detailed screenshot of a goal progress tool. At the top, the goal title is 'Document business processes and identify improvements and efficiencies' with a 12% progress indicator. A status bar shows 'Status: In Progress', 'Due Date: 12/31/2019', and 'Strategy: 2 Projects & Strategy'. A slider control is present with the instruction: 'Click and drag the circle to move the slider. Progress is subjective.' A dropdown arrow is highlighted with a red box and the instruction: 'Click the expand bracket to see goal details.' The description section contains the text: 'I will create a journey map for the most common service tasks in my area. Using this map I will identify opportunities where we can improve systems, processes, and resources so we can be more efficient and effective in serving students and other entities. I will collaborate with my colleagues to prepare recommendations to the Director. This work reflects our commitment to continuous improvement.' A 'read less' button is highlighted with the instruction: 'Click "more/less" expand the description.' The 'Attachments' section has a 'Choose File' button and the instruction: 'Add documents such as reports, plans, evaluations, letters, presentations, etc. Attachments can be replaced so you can always decide later what you want to see during the progress review.' Below this is an 'Add Comment' button with the instruction: 'Click "Add Comment" to show comment box.' A large comment box is shown on the right with the heading 'Comment when:' and a list of bullet points: 'Steps are completed', 'Notable challenges or opportunities encountered', 'Work was done that exhibits competencies and other qualities.', and 'Significant changes to goal timeline or outcomes.' At the bottom, there is a rich text editor with formatting tools (B, I, S, U, list, link, unlink, undo, redo) and 'Cancel' and 'Add' buttons.

Tips for Updating Goal Progress

How: The Progress Bar, Commenting Tool, Attachments

Q. What should go in the comments section when I update goal progress? Document:

- Any notable challenges or successes you experience. Will you remember these at the end of the year? Document them as they occur so you will have a narrative of your progress.
- Any significant milestones or decision points on the road to completing the goal.
- Any feedback you received. You can paste in a copy of an email.

Q. How do I update progress and comments for a Key Responsibility that is a routine activity?

You can update the **progress bar** according to ...

- **Time:** You can show your progress as a percentage of the performance year. For instance, April 1st was the mid-point of the 2015-16 performance year. The progress bar, therefore, can be set at 50%.
- **Quantity:** If your Key Responsibility has distinct steps or stages, or quantifiable objectives, it can be documented by the percent of those stages or objectives completed.

Q. What if I want to upload more than three attachments?

You can combine files into one attachment (merge Word files, or combine files in a PDF).

When:

Q. When do I update the Goal Progress bar?

Expressing goal progress is subjective. Here are some ways to think about it:

- If your goal has **distinct steps or stages**, your progress can be shown as a percentage of steps completed (eg. 3 of 5 steps would equal 60% complete).
- If your goal has **a quantifiable objective** your progress can be shown as a percentage of your target quantity (eg. 250 of 500 records transferred equals 50% complete).
- If your goal is to **sustain a project over time** your progress can be shown as a percentage of total time (eg 5 months elapsed in a 7-month project equals 71%).

Q. How often should I update?

This will vary depending on how quickly goal-related milestones occur or how often you and your manager want to review progress. At the very least, you should **update and comment on progress frequently enough that you do not forget to document notable activities, accomplishments and challenges**. Consider blocking time on your calendar to reflect on and document progress at least once a month.

Q. When should I change my goal description (edit the goal)?

When there is a **change in the end date**, a significant **change in a deliverable** or a **significant change in how the goal will be accomplished**. Document your changes in the comments section.

Q. When should I cancel a goal? When it is no longer relevant or a priority for the current performance year. If only part of the goal can be accomplished, you can edit your goal to change the scope rather than cancel it. Document your changes in the comments section