Reviewing Your Team's Goals
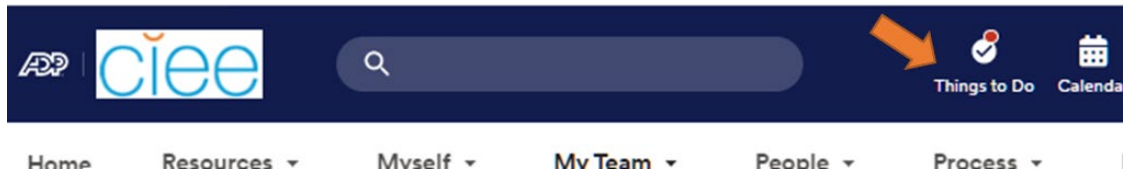
Managers will receive a system-generated email advising them that a team member has added or updated a goal. Automatic reminders will continue until action has been taken on the goal.

Reviewing a Goal:

1. Access the Goals through **Notifications** under **Things to Do** at the top of the screen

Click on the **Things to Do** tab and then **Notifications.**

Select the **three dots** and click **Review.**

This will bring you to the employee's goal. In review mode, you can edit the goal and/or the timeline. You can either send the goal back to the employee or approve it by clicking one of the options at the bottom of the screen. You will have the option to add comments for both approvals and rejections.

Approve Goal Creation

View activity log

Define The Goal

English (US)	Spanish (US)	English (CA)	French (CA)
Translations Available	Not available	Not available	Not available

Give A Name To This Goal *

Test Goal

Align this goal to a parent goal

Align goal

Enter A Description Of This Goal

Test goal for screenshots

What category does this goal belong to?

DEVELOPMENTAL · Developmental x

Consider this goal as

◉ Personal Goal   ○ Team Goal

Define The Goal Timeline

Target Start Date *

09/01/2022

⊕ ADD/REMOVE MILESTONE(s)

Target Completion Date

08/31/2023

Choose Reviews And Weightings

This goal has not been assigned to any review

Send Back   Approve

The employee will receive an email notification that the goal has either been approved or rejected.
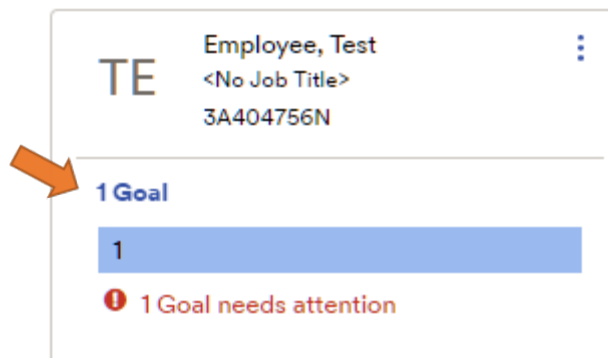
Aligning a Goal

The aligning goals feature is for informational or discussion purposes only, aligning goals does not link completion status, comments, or progress.

- To align a goal, managers and employees will need to each create separate goals.
- Once both the manager and employee goals have been approved, the manager can then align the goals.
- Access this through **Talent: Performance Goals** under the **My Team** menu.
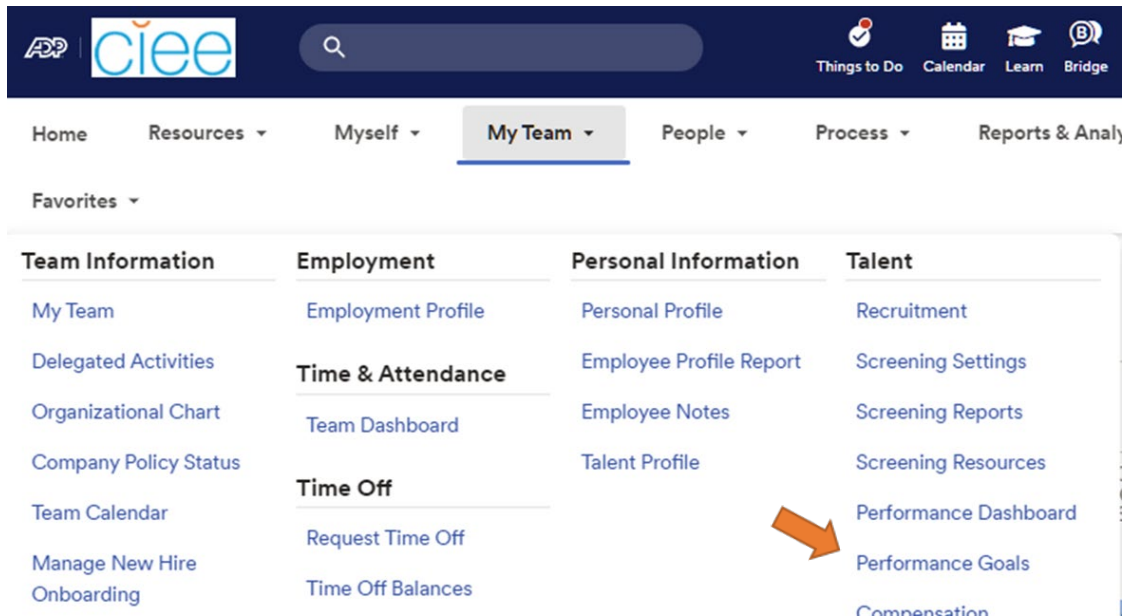
Clicking **Performance Goals** will bring you to the Performance Goals dashboard for your team.

Click on the number of goals under the employee's name to see all the employee's goals.

For questions or problems please reach out to Human Resources:
US Staff: hris@ciee.org
International Staff: awells@ciee.org

Click on the three dots to the right of the goal that you want to align and choose **Edit.**

Click **Align Goal.**

On the next screen, a list of your goals will appear on the left. Select which of your goals you want to align the employee goal to and click **Save.**

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Assigning a Team Goal
You can assign a goal or goals to all your team or select multiple team members who may be working on the same project for the year.

Access this through **Talent: Performance Goals** under the **My Team** menu.
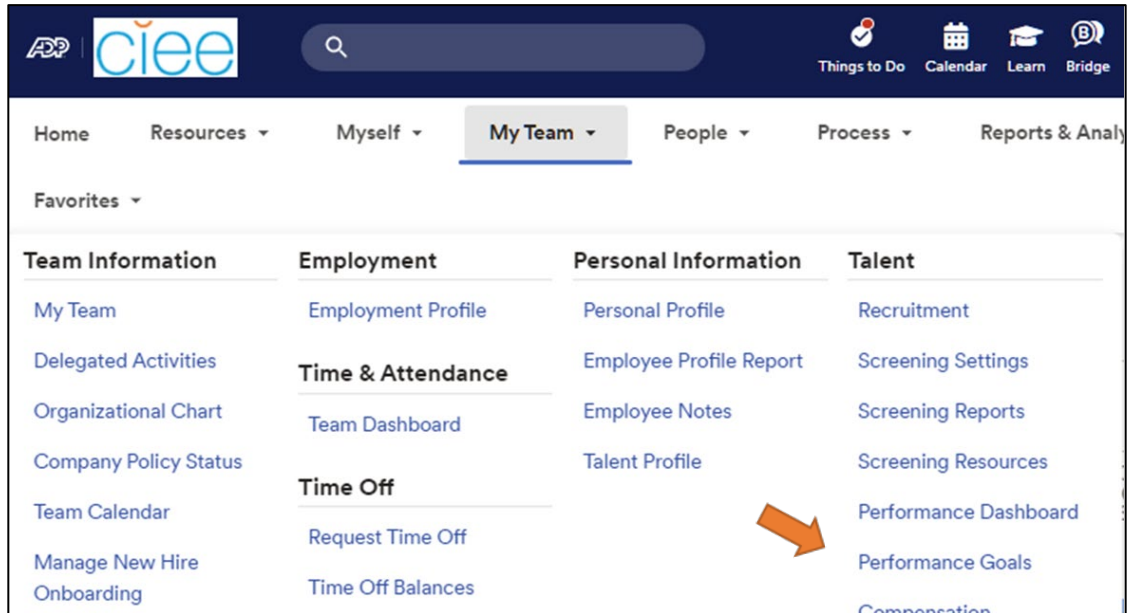
Click **Create Goal**.
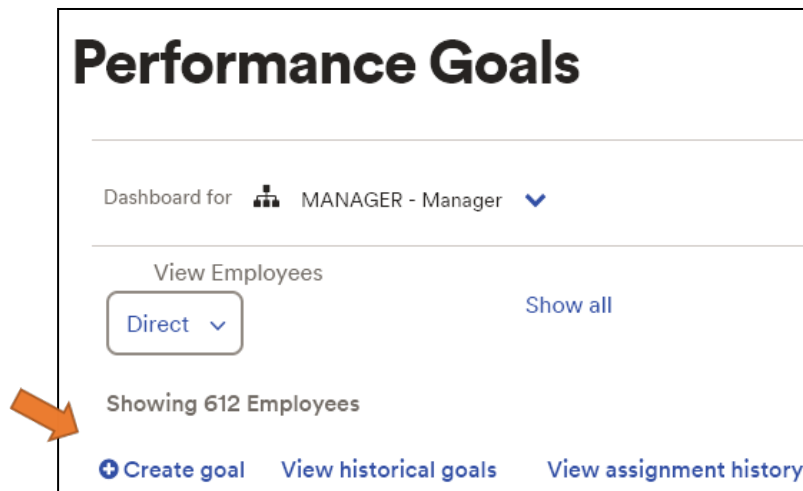
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On the next screen you will have the following options:
- **Give a Name to This Goal**
- **Enter a Description of This Goal**
- **What category does this goal belong to?**
- **Define as a Personal or Team Goal**
- **Target Start Date**
- **Target Completion Date**
- **Assign to Employees or Assign to all Employees**

When you have finished, click **Submit.**

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Keeping Goals Up to Date

As we move through the fiscal year, you should be periodically checking on the status of your goals, discussing them with your manager, and making any edits or changes. This will not only keep your goals current but will also have them reflect more accurately once they are pulled into your performance review.

Once your goal has been approved some of the options you have are highlighted below.

Please note that any of these changes shown in the following section will require manager approval.

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Goal Status

When you create a goal, the status defaults to **Active.**

If you have completed the goal, you should change the status to **Complete**.
- When you mark a goal as complete it will show the appropriate status under your **Performance Goals** tab.

- If a goal is not marked complete it will continue to track progress after the fiscal year ends which results in an overdue status.

If the goal has become irrelevant, you can change it to **No Longer Pursued** (with manager approval).

Completion Details
- If you mark your goal **Complete** you should also update the **Achievement** % to reflect 100% and fill in the actual start and completion dates.

Milestones
- If you have indicated milestones for your goals, you should be monitoring these throughout the year as well and update as needed.

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Historical Goals

Once the current year's performance review cycle has been closed and you have marked all your goals as complete and your manager has approved, you can mark the goals as historical so they will no longer show on the current goal screen.

To mark a goal as historical, click on the three dots in the upper right and select **Mark as Historical.**
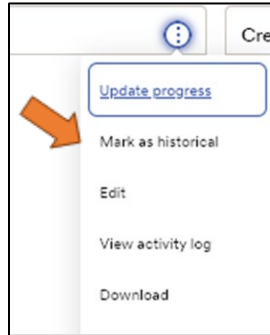
You can view your historical goals by clicking the View Historical Goals tab on the Performance Goals Dashboard.