

PD&E Goal Setting 18-19

PD&E Goal setting launched in mid-October, 2018. Employees found a new message in their Outlook inbox letting them know it was time to reflect and reimagine their work for the current year in order to move CMSD forward. Friends, “A task awaits you...”

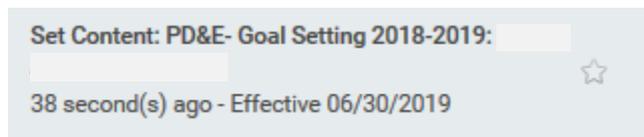
No Reply - clevelandmetroschools.org

A Task Awaits You: Set Review Content for Performance Review - PD&E- Goal Setting 2018-2019: J

To begin the goal setting process, employees need to log in to their Workday account. They can access the goal setting task from the WD inbox.



Click on the goal setting task to access the template



The Go to Guided Editor button will walk an employee through each type of goal one at a time.



Functional goals have been divided into four types this year to help focus the goal-setting efforts. The first type in the template is Strategic. Strategic goals are intended to tie tightly to the work of the [Central Office Support Plan \(COSP\) that is supporting CMSD's Theory of Action](#). If your work directly aligns and supports the COSP then a Strategic goal is appropriate for you. Click Add to begin.

38 second(s) ago - Effective 06/30/2019

Strategic Goal ▾

Strategic Goal
Strategic goals directly relate to the implementation of the Central Office Support Plan.

Add

Enter a goal in the text box provided. Under Support align your goal to one of the CEO's goals for the year or one of the four Chief's' goals (all Chiefs have the same goals this year). Enter a due date for your goal. Most goals will have a due date of June 28, 2019, but some may finish sooner. Enter the status of your goals. Many goals will already be In Progress, having begun prior to the launch of the goal setting template. (This is a way to document our goals, but they actually exist in our work outside of the documentation process.) Click Next to move to the next category of functional goals.

Goal *

Normal | B | I | U | A | [List Icon] | [Link Icon]

If your work this year is aligned to the central office support plan, you can create a goal centered on supporting that work.

Supports

× Chief #1- Lead the implementation of the Revised Theory of Action and the Central Office Support Plan (Private)

Due Date

01 / 01 / 2019 [Calendar Icon]

Status

In-Process [Dropdown Arrow]

Back [Button] Next [Button]

The next option in the template is Routine. Routine goals are goals related to the performance of regular job duties, but these goals should not duplicate the expectations of job performance outlined in your job description. That is, you do not write a goal that restates what you are supposed to be doing anyway. You may be taking on a new project as part of your work or learning a new system. Those would be appropriate subjects for a Routine goal.

You can skip ahead to different types if you need to by clicking the drop down arrow next to the goal type.

on of essential duties often tied to a job description

Routine Goal [Dropdown Arrow]

- Strategic Goal
- Routine Goal
- "AND" Goal
- NPS Goal
- Competency Goal
- Summary

Continue with the same steps to enter a Routine goal into the template. Click Add; enter the goal; select a support from the 2018-2019 options (CEO or Chief); enter a due date (often June 28, 2019 – but it depends on the goal); the appropriate current status for this goal (some may not be started yet, but most will be In Process); click Next to move to the next section.

38 second(s) ago - Effective 06/30/2019

Routine Goal ▾



Routine Goal
Routine goals highlight execution of essential duties often tied to a job description.



Goal *

Normal ▾ | **B** | *I* | U | **A** ▾ | ☰ | 🔗 | ↗

Routine goals may be related to your regular job duties. Please understand that you are expected to perform the duties of your job without a specific goal - that is the baseline expectation for performance. However if you are learning a new process or implementing a new strategy you may want to create a goal tied to those projects.

Supports

search

☰

← 2018 to 2019

- CEO #1- Improve the District's overall organizational health (Private)
- CEO #2- Improve the overall academic performance of the District and its schools by increasing performance (Private)
- CEO #3- Improve trust in the District, its schools and its academic improvement strategies (Private)

Due Date

MM/DD/YYYY

Status

select one

> Details

Add

June 2019						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

Status

select one

select one

Not Applicable

Not Started

In-Process

Complete

Back

Next

Next

The next type of functional goal is an AND goal. AND is an acronym for Anticipated, Necessary, and Discrete. This goal is documenting your contribution to, and progress on, a project for this year. While this is a year of “no new initiatives” per CEO Gordon, some departments already had projects on the table that must be completed this year. If your department is working such an initiative, then it makes sense for you to write a goal describing how you will contribute to (or lead!) that project.

Goal *

Normal

AND goals relate to one-time, large-scale projects you are contributing to this year. For example, the 27 to 24 pay project is an AND project.

Supports

- × CEO #1- Improve the District's overall organizational health (Private)

Due Date

04/12/2019

Status

In-Process

Next up is the NPS goal. NPS stands for Net Promoter Survey. This is survey given annually to our principals, assistant principals, and curriculum and instructional specialists that captures customer satisfaction data by asking how likely they are to recommend the services of various CMSD departments. Currently Operations, Talent, IT, and Finance are the subjects of the NPS survey, but it will in the future be expanded to other departments as well.

NPS Goal

NPS goals support increasing a department's score on the Net Promoter Survey (not applicable to all departments).

Goal *

Normal v | **B** | *I* | U | A v | ☰ | 🔗 | ↗

A goal related to the Net Promoter Survey score for a department would focus on Closing the Loop, Response Times, Processes, or Customer Experience. While not all departments are part of the survey many departments have similarly aligned goals for their staff performance.

^
v

Supports

x CEO #3- Improve trust in the District, its schools and its academic improvement strategies (Private) ☰

Due Date

02 / 01 / 2019 📅

Status

In-Process v

> Details

Back

Next

Every employee is expected to write a Competency goal. Competency goals are focussed on *how* you perform your work. CMSD has a Competency framework you should use to guide you in writing your Competency goal. These goals, too, are aligned with one of the CEO’s goals or one of the four Chiefs’ goals.

Goal *

Normal ↕

All CMSD employees evaluated in PD&E are expected to write at least one competency goal. Use the CMSD competency framework to set a goal around the level at which your work will be performed. These are impactful goals often dealing with increased levels of collaboration, personal leadership development

Supports

× CEO #1- Improve the District's overall organizational health (Private) ⋮

Due Date

05 / 31 / 2019 📅

Status

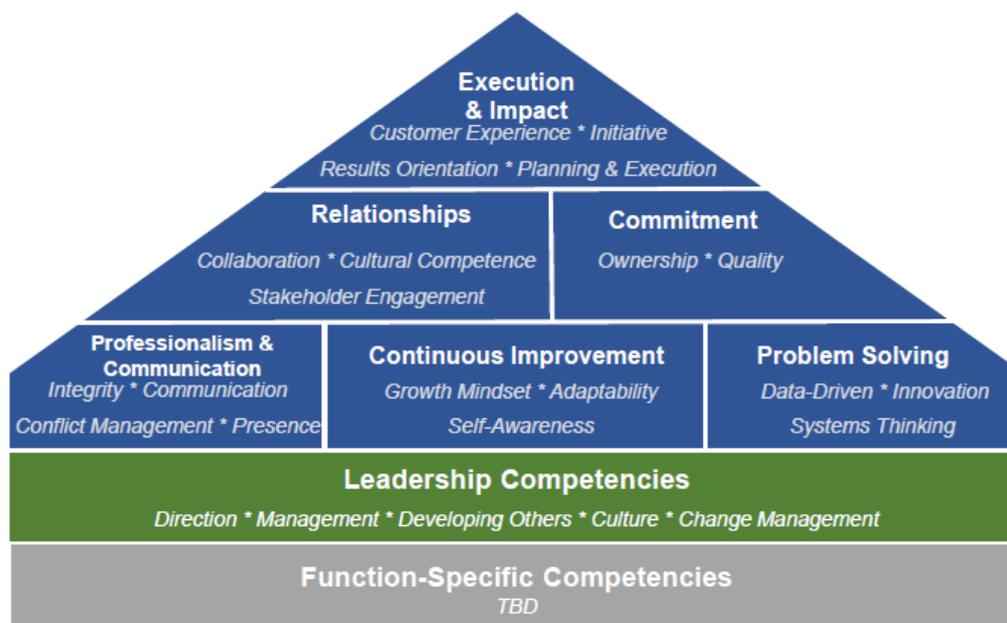
In-Process ▼

[> Details](#)

Add

Back Next

This is the competency structure you can use to write your goal – but the [full framework is posted](#) on the Performance Management web site and has more detail to support you in setting your goals.



After you enter your goals you can review them all. Click the Edit pencil for the goal you want to edit and make any changes or corrections.

Strategic Goal Guide Me

Goal *
If your work this year is aligned to the central office support plan, you can create a goal centered on supporting that work.

Supports
Chief #1- Lead the implementation of the Revised Theory of Action and the Central Office Support Plan (Private)

Due Date
01/01/2019

Status
In-Process

Add

If your goals are complete click Submit. This will send your goals to your manager to review. If you click Close or Save for Later you will be able to return to your goals and make further edits. You will need to click Submit when you are ready for your manager to review your work.

Submit Save for Later Close

After clicking Submit you will receive an update from Workday notifying you the submission was complete. You will see the manager assigned to review your goals “Up Next.” Click Done.

Success! Event submitted [Set Content: PD&E- Goal Setting 2018-2019:](#) Actions

38 second(s) ago - Effective 06/30/2019

Up Next

Set Review Content
Due Date 10/19/2018

> **Details and Process**

Done

Your manager will now review your goals and either approve or send them back for editing. Your manager can also edit the goals if necessary.