ADDING INDIVIDUAL GOALS & ALIGNING TO THE DEPARTMENT GOALS

STEP 1:

Access **PERFORM** through the link in **Inside Surprise.** If using a city computer, a login will not be needed

Surpriseaz.gov | Employee Self Service (ESS) | Perform (PE) | Munis | Target Solution Training 🔍

STEP 2:

From the **PERFORM** homepage, click on the **Goal Dashboard**

Evaluation Dashboard   Goal Dashboard

STEP 3:

From the right side of the page, select **Add Goal** and then **New Goal**

+Add Goal

From Library

New Goal

STEP 4:

This will open the Goal Entry page. There are three tabs to review, **General, Milestones & Alignment**.

🏆 Add Goal

General   Milestones   Alignment

The first tab is the **General** goal tab. Enter the required fields to include:

- **Goal Name**: this is the goal that you will be assigning to an individual
- **Goal Due Date**: this is the target completion date of the goal
- **Category**: select **Individual Plan** as this is an individual employee goal
- **Assignee**: type in the name of the person you are assigning the goal. If creating a goal for yourself, enter your own name, or select *Myself* next to the assignee field
- **Description**: this provides space for a description of the goal

Goal Name *

Goal Type *   Goal Due Date   Category *   New

(/DD/YYYY)

Assignee *   Myself

Description

Next, select the **Milestone** tab. You may enter milestones towards the goal and milestone due dates to track progress of the overall goal. *Setting milestones is optional*.

To add a milestone, select **Add New Milestone**. Complete the required fields, to include the name of the milestone and the due date. If you would like to add more than one milestone, select **Add New Milestone** until all targeted milestones and dates are added.

If milestones are entered, you may opt to check the **Use Weights** box to automatically update the goal progress bar when the milestones are achieved.

The last step is to **Align** the Individual goal with one of the Department goals. To align to the parent goal of the department, select the **Alignment** tab. Click **Select Parent Goal.**

- **Select Type:** select **Department Goal** from the dropdown option
- **Select Goal**: all department goals have been added to PERFORM. To search the list of department goals, start typing in your department name (ex. CRS, ST, CD, CM, ED, Finance, FIRE, HSCV, IT, PD, PW, WRM) for the department goal selection. Select the department goal to create the alignment to the individual goal. A maximum of eight department goals will appear unless you type further description.

Once the alignment is completed, select [Save] to complete the goal entry!