How to Cascade Goals
This guide is the print companion to the video tutorial, “How to Cascade Goals.” Additional instructional content for the Annual Performance Evaluation Process is available on the Annual Performance Evaluation webpage of the Human Resources website.

If you have other questions, please contact the Office of Human Resources via e-mail at humanresources@furman.edu.
In this supervisor presentation, we will provide instruction on how to cascade goals to your direct reports and subordinate supervisory organizations.

The objective of cascading goals by those in leadership is to help employees maintain sight of an organization's mission, preclude goal misalignment, and help employees understand how their work fits into the big picture by fostering their engagement.
How to Cascade Goals

Senior leadership establishes the mission and values of our institution.

Strategic divisional goals are crafted by leadership in the respective divisions to be implemented by the employees in those divisions.

 Supervisors within those divisions draft department goals to support the strategic goals of the division along with the mission and values set forth by senior leadership.
Previously, supervisors could only view goals as a part of a performance review. Goals could not be added outside of a performance review, nor could the goals be cascaded.

Now, supervisors can view goals prior to the start of the performance review and cascade them to those within their line of supervision.

To start, click “Team Performance” from the homepage.
Click “Add Goal to Employees.”

Or, if you prefer, from the home page, type in the search bar “Add Goal to Employees” and click the task, “Add Goal to Employees.”

The radio button, “Create New Goal” is pre-selected. To add a new goal, click in the Employees box under “Assign to.”
How to Cascade Goals

Then click “My Team.”

Click the box next to one or more names of direct reports to whom you want to assign the goal.

Or, to assign a goal to your entire supervisory organization (that is, all of your direct reports), in the “Organizations” box, click “My Organizations.”
How to Cascade Goals

Then click the box next to your name.

To include the direct reports of your direct reports (if they have their own supervisory organizations), check the box “Include Subordinate Organizations.”

Notice how many to whom the goal has been assigned. In this example, the number to whom the goal is assigned is 37. Who does this include?
How to Cascade Goals

Included are your four direct reports, and all of the direct reports who have their own respective supervisory organizations. In this example, the goal is assigned to 37 total staff members.

Type in the title of the goal in the Goal box. In the Description box, using the SMART goal format, enter the description of the goal.

A new feature for this evaluation period is that the goals can be categorized. Click in the Category box to show the category options.
How to Cascade Goals

Check the box next to the applicable categories. One or more may be selected.

Enter a due date in the Due Date box. Click “Add” to assign another goal, or if finished, click “Submit.”

You have successfully added a goal for your direct reports and their supervisory organizations. Click “Done.”
How to Cascade Goals

Remember, all goals should be written in the SMART goals format. Also, all goals cascaded to subordinate organizations, are subject to approval by that unit’s supervisor.

Finally, ask your direct reports to mark the status of the goals you cascaded as incomplete so that they can roll over into the performance evaluation for the respective staff member.

For more information on how to write the goals, use the SMART goals worksheet and instructions, which can be found on the Annual Performance Evaluation page on the Human Resources web page.
Thank you for reading. If you have questions, please send an e-mail to humanresources@furman.edu.