Staff Member
Fall To-Do Checklist

☐ Clean up old goals
   ☐ Review all goals on the Individual Goals screen
     ☐ For each goal:
       ☐ If blank, enter a category
       ☐ If blank, update the status – “Not Applicable,” “Incomplete,” “Partially Complete,” “Successfully Complete”
       ☐ If “Successfully Complete” and blank, enter the date by which the goal was completed.
       ☐ If blank, enter the date the goal was due

☐ Meet with supervisor
   ☐ Prior to the meeting, obtain a copy of your job description from your supervisor (or in the alternative, access your job description in Workday)
   ☐ Discuss any changes to the job description
   ☐ Discuss current competencies
     ☐ Determine if competencies should be changed based on current role/job description
     ☐ Remind supervisor to edit competencies, if necessary
   ☐ Discuss goals
     ☐ Discuss goals that support your role and align with department objectives
     ☐ Discuss how goals will be measured
     ☐ Discuss how successful completion of goal will be applied for the benefit of the department, division, or University

☐ Determine who will draft SMART goals and enter into Workday
   ☐ If it is you, use the SMART goal worksheet
     ☐ Determine which goals will be prioritized for the current evaluation year
     ☐ Discuss the applicable categories for the goals
     ☐ Discuss the weighting of each goal that will be evaluated for the current evaluation year (total weight of goals shall not exceed 100)
     ☐ Determine a date by which the SMART goals will be drafted and reviewed
   ☐ Provide drafts to supervisor
   ☐ Finalize the drafts in a follow-up meeting
     ☐ Discuss any edits to the SMART goals
   ☐ Follow the instructions “How to Add, Edit and View Goals” to enter into Workday

☐ Maintain SMART goals in Workday
   ☐ As you make progress toward completion of the goal(s), make updates, as necessary
   ☐ Check notifications for cascaded goals and approval of updates to goals