

My HR Connection Performance Training Guide

Individual Contributor – Goal Setting Conversation

Revision History

Version	Date	Description
Version 1.0	July 13, 2018	Initial Draft
Version 1.1	September 6, 2018	Updated Screen shots
Version 1.2	March 25, 2019	Logo update and Branding
Version 1.3	August 26, 2020	Updated with new process

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1. Introduction

1.1. Objectives

Upon completion of this manual, an Individual Contributor will be able to:

- Understand the Goal Setting Conversation Components.
- Successfully complete their required tasks in My HR Connection.



Figure 1: Goal Setting Conversation Business Process

2. Goal Setting Conversation

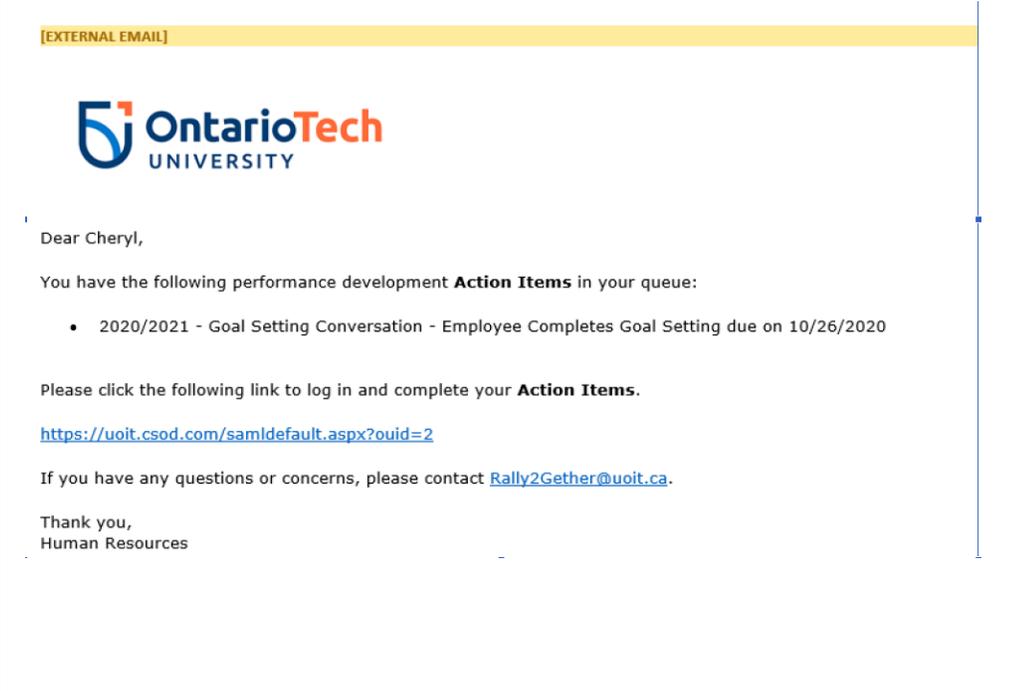
2.1. Goal Setting Conversation

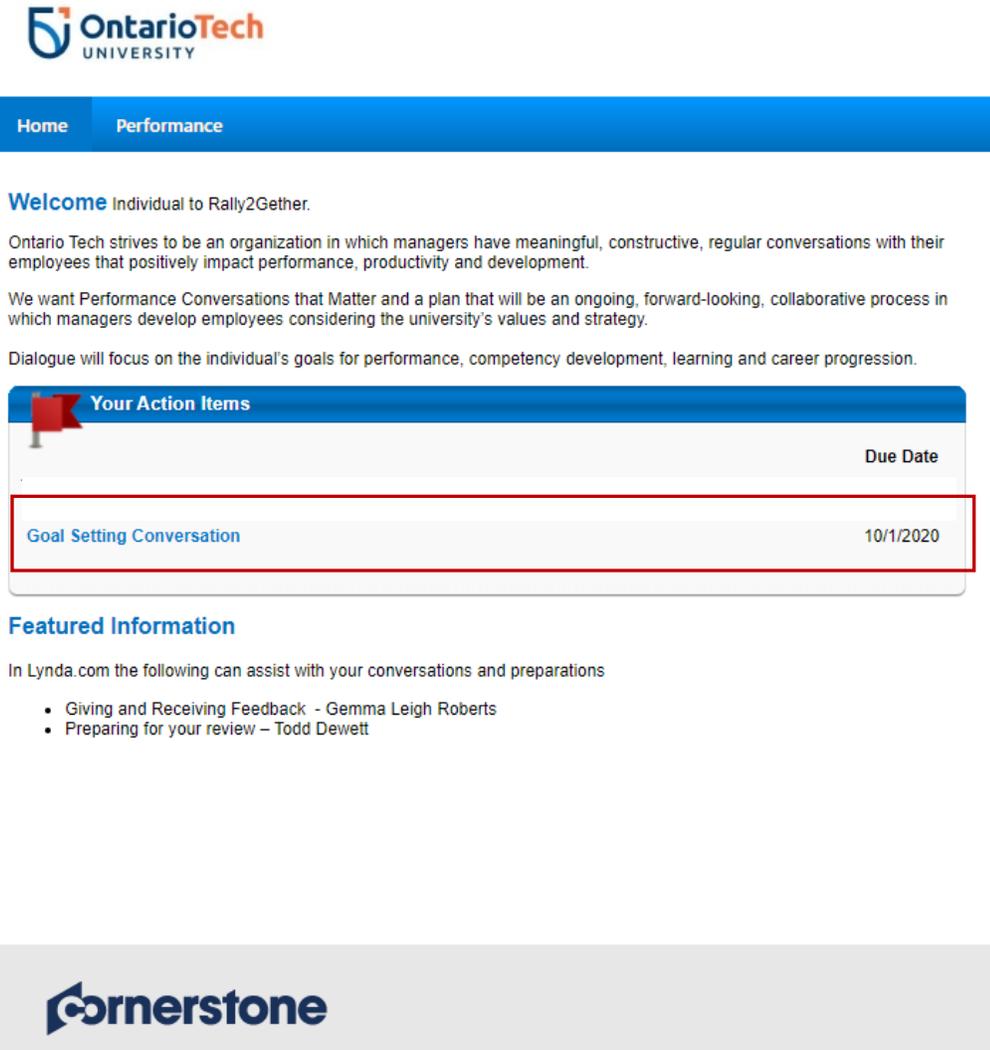
The purpose of the Goal Setting Conversation is to provide employees and managers an opportunity to meet and discuss what the employees plan to accomplish in their role over the next year. Goal setting conversations are a collaborative process.

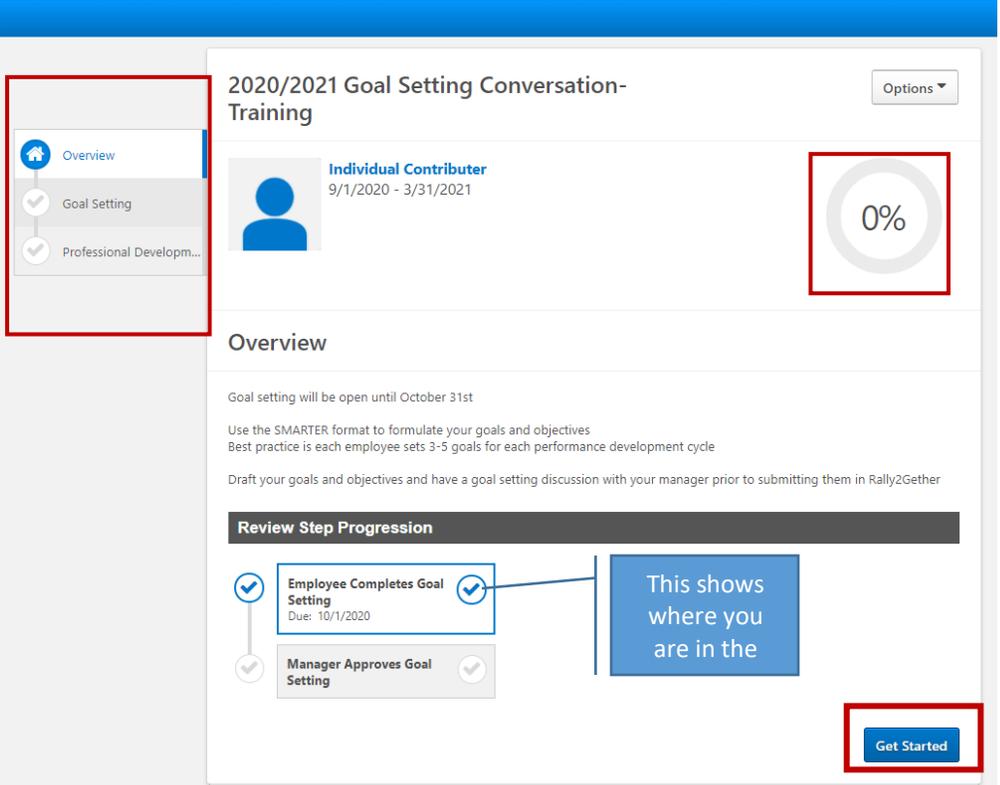
Points for discussion may include:

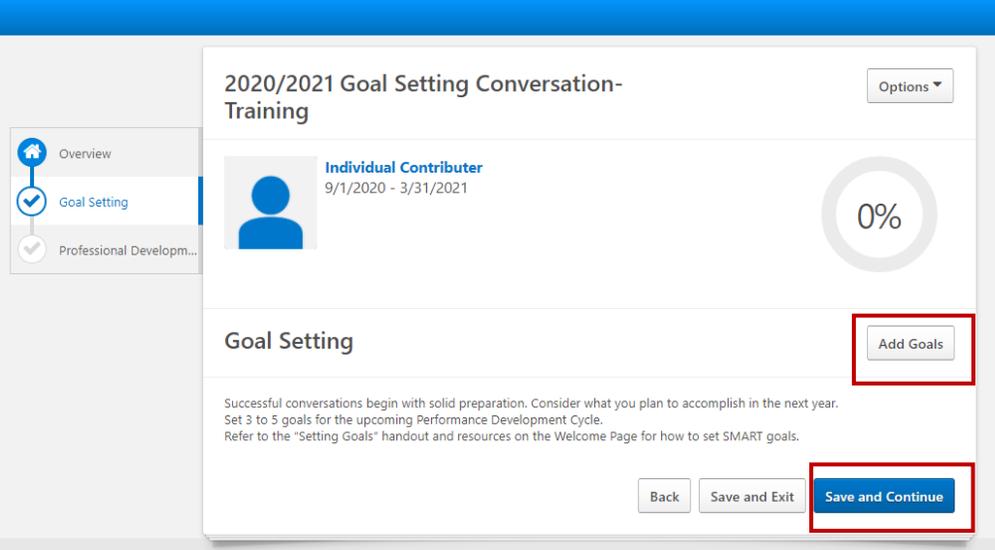
- Review the university's mission, vision, and values and priorities to consider how your goals could align.
- How can you in your role contribute to the success of your department, faculty, and the university?
- What do you love about your job? What are your strengths? How can you align your strengths with the goals you set this year?
- Which skills would you most like to develop? What goals could be set to support this development?

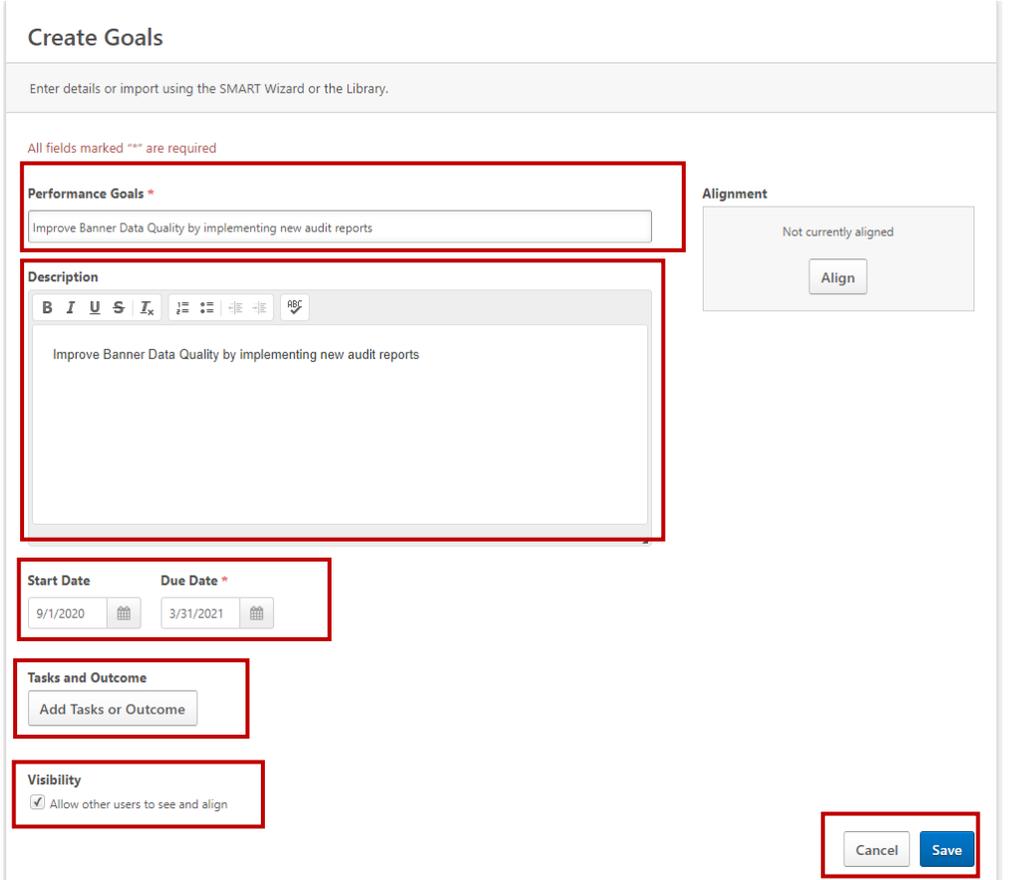
2.2. Entering your Goals in My HR Connection:

	Step	Steps to Execute
1	<p>You will receive an email notification from MyHRConnection@notifications.ontariotechu.ca</p> <p>that tells you that the goal setting task has been assigned to you.</p> <p>Select the link to log in to My HR Connection or navigate from the performance development website.</p>	<p>[EXTERNAL EMAIL]</p>  <p>Dear Cheryl,</p> <p>You have the following performance development Action Items in your queue:</p> <ul style="list-style-type: none"> • 2020/2021 - Goal Setting Conversation - Employee Completes Goal Setting due on 10/26/2020 <p>Please click the following link to log in and complete your Action Items.</p> <p>https://uoit.csod.com/samldefault.aspx?ouid=2</p> <p>If you have any questions or concerns, please contact Rally2Gether@uoit.ca.</p> <p>Thank you, Human Resources</p>

	Step	Steps to Execute				
2	<p>Complete Action items from the Welcome Page.</p> <p>Select Goal Setting Conversation to begin the process.</p>	 <p>OntarioTech UNIVERSITY</p> <p>Home Performance</p> <p>Welcome Individual to Rally2Gether.</p> <p>Ontario Tech strives to be an organization in which managers have meaningful, constructive, regular conversations with their employees that positively impact performance, productivity and development.</p> <p>We want Performance Conversations that Matter and a plan that will be an ongoing, forward-looking, collaborative process in which managers develop employees considering the university's values and strategy.</p> <p>Dialogue will focus on the individual's goals for performance, competency development, learning and career progression.</p> <p>Your Action Items</p> <table border="1"> <thead> <tr> <th></th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>Goal Setting Conversation</td> <td>10/1/2020</td> </tr> </tbody> </table> <p>Featured Information</p> <p>In Lynda.com the following can assist with your conversations and preparations</p> <ul style="list-style-type: none"> • Giving and Receiving Feedback - Gemma Leigh Roberts • Preparing for your review – Todd Dewett <p>Cornerstone</p>		Due Date	Goal Setting Conversation	10/1/2020
	Due Date					
Goal Setting Conversation	10/1/2020					

	Step	Steps to Execute
3	<p>My HR Connection displays the process overview and the steps to complete the task.</p> <p>Follow the workflow steps to understand where you are in the process.</p> <p>Review the related status, which indicates the percentage of completion.</p> <p>Select the Get Started Button to begin the task.</p>	

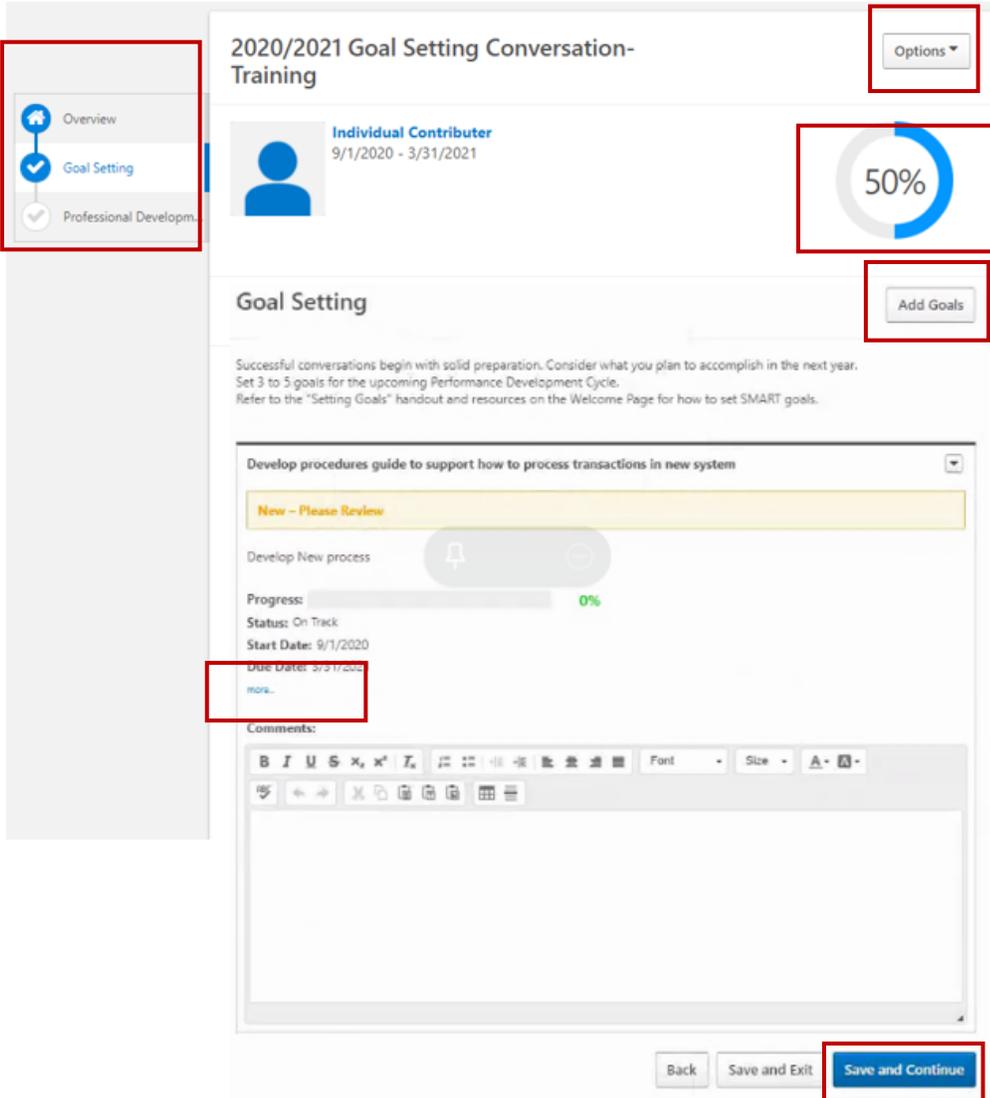
	Step	Steps to Execute
4	<p>The Goal Setting Conversation activity is launched.</p> <p>Select Add Goals to open the Create Goals form. (see image 5)</p> <p>Repeat this process to enter all of your goals.</p> <p>Clicking the Save and Exit button will save where you are in the process and exit the form.</p> <p>When you have finished entering your goals click Save and Continue.</p>	

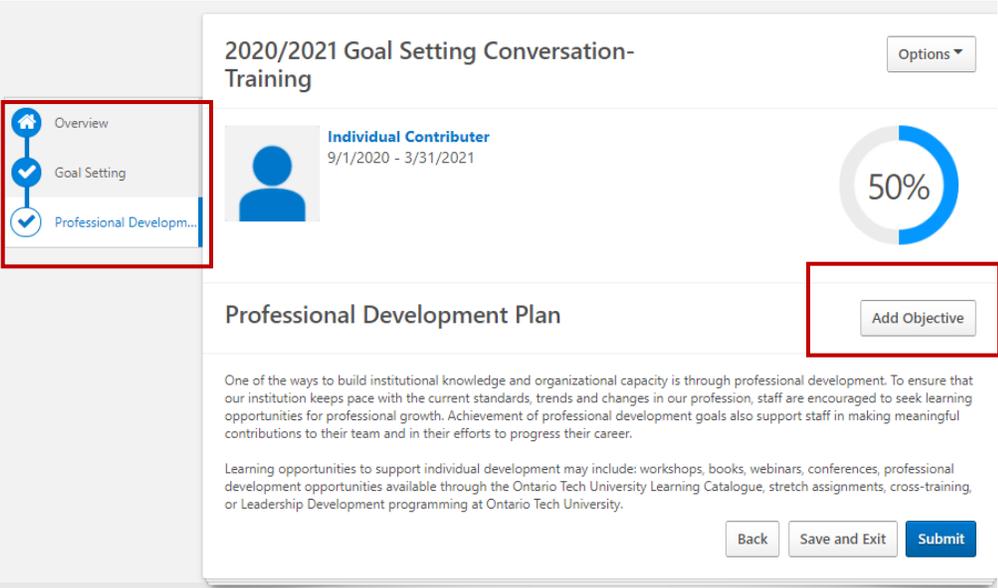
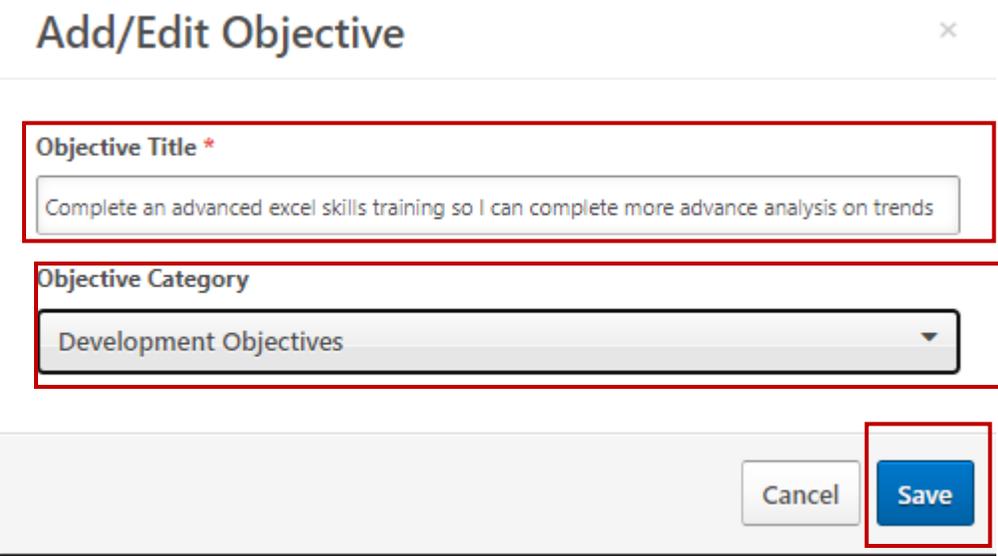
	Step	Steps to Execute
5	<p>When the Create Goals form opens - enter the performance goal title, description, start and end date.</p> <p>Select the Add Tasks or Outcomes button to define the action items that you will complete to attain your goal.</p> <p>*(OPTIONAL) Clicking the check box Visibility - allows other members of your team to see and align goals. This could be used for a department wide goal or a team goal.</p> <p>Click Save.</p>	 <p>The screenshot shows the 'Create Goals' interface. Key elements highlighted with red boxes include:</p> <ul style="list-style-type: none"> Performance Goals *: A text input field containing 'Improve Banner Data Quality by implementing new audit reports'. Description: A rich text editor area containing the same text as the Performance Goals field. Start Date: A date picker set to 9/1/2020. Due Date *: A date picker set to 3/31/2021. Tasks and Outcome: A button labeled 'Add Tasks or Outcome'. Visibility: A checkbox labeled 'Allow other users to see and align' which is checked. Save/Cancel: Buttons at the bottom right of the form.

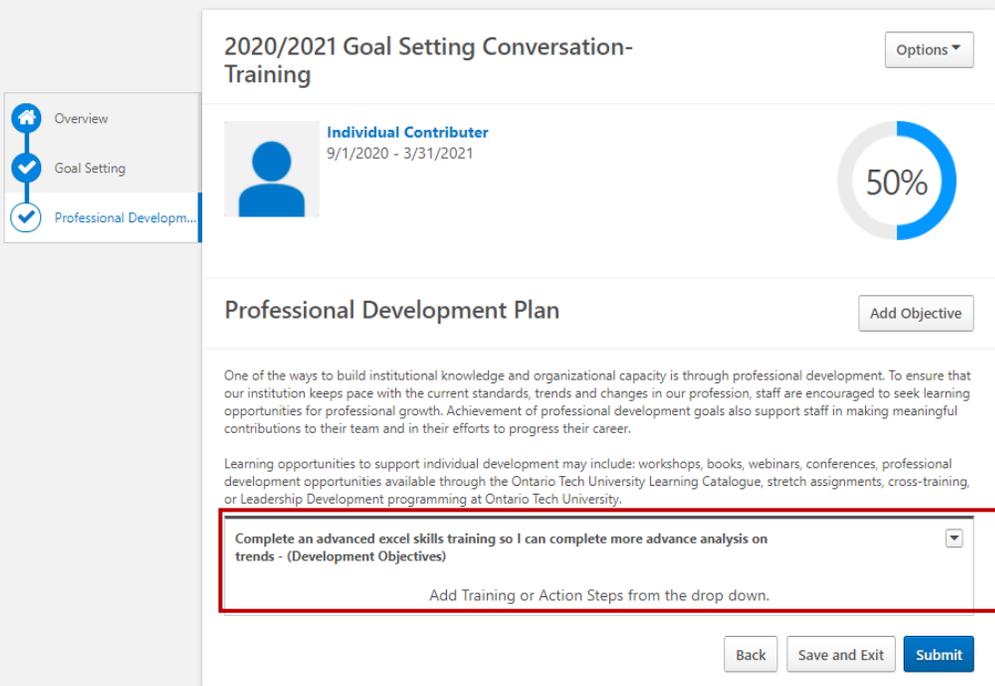
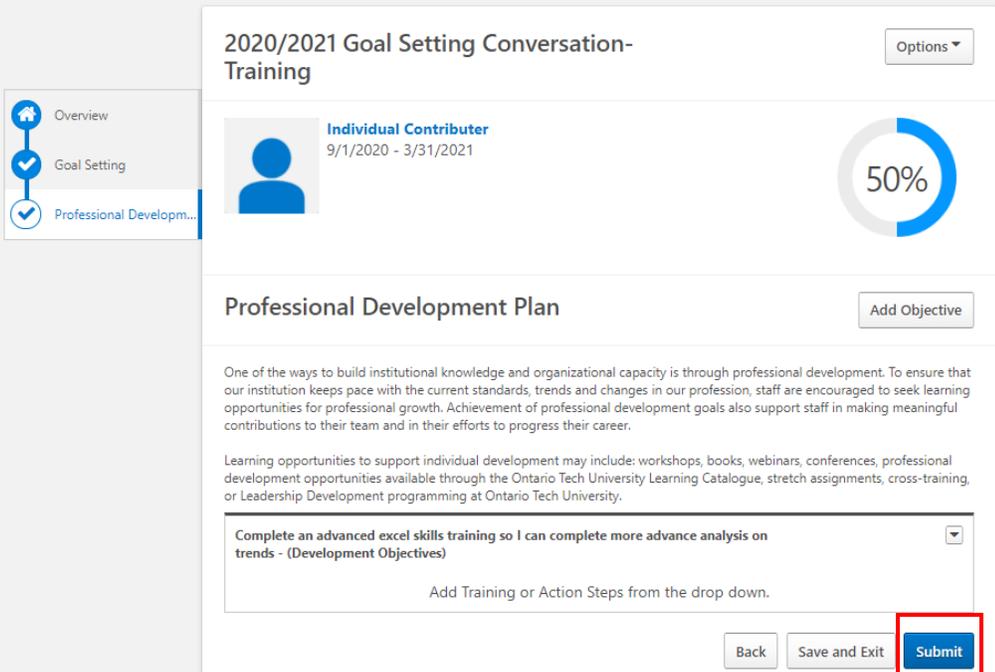
	Step	Steps to Execute						
6	<p>Add Tasks or Outcomes</p> <p>Include a description of the task that will be completed to achieve your goal.</p> <p>Enter the date the task is due by and select include target to include the metric of the task outcome.</p> <p>Click Done.</p>	<div data-bbox="560 388 1572 1066"> <h3>Add Tasks or Outcome ×</h3> <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> <p>Description *</p> <input type="text" value="Build a report to ensure student records are complete to improve data quality by 10%"/> </div> <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> <p>Start Date * Due Date *</p> <div style="display: flex; justify-content: space-between;"> <div style="border: 1px solid gray; padding: 2px;">10/1/2020 </div> <div style="border: 1px solid gray; padding: 2px;">11/30/2020 </div> </div> </div> <div style="border: 1px solid red; padding: 5px; margin-bottom: 10px;"> <p><input checked="" type="checkbox"/> Include Target</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left; border-right: 1px solid gray;">Type *</th> <th style="text-align: left; border-right: 1px solid gray;">Start Value *</th> <th style="text-align: left;">Target *</th> </tr> </thead> <tbody> <tr> <td style="border-right: 1px solid gray;">% ▼</td> <td style="border-right: 1px solid gray;"><input type="text" value="20"/></td> <td><input type="text" value="10"/></td> </tr> </tbody> </table> </div> <div style="display: flex; justify-content: flex-end; gap: 20px;"> Cancel Done </div> </div>	Type *	Start Value *	Target *	% ▼	<input type="text" value="20"/>	<input type="text" value="10"/>
Type *	Start Value *	Target *						
% ▼	<input type="text" value="20"/>	<input type="text" value="10"/>						

	Step	Steps to Execute					
7	<p>Click Add Tasks or Outcome when there is more than one activity required to complete the goal. (this is usual)</p>	<p>Create Goals</p> <p>Enter details or import using the SMART Wizard or the Library.</p> <p>All fields marked *** are required</p> <p>Performance Goals *</p> <p>Improve Banner Data Quality by implementing new audit reports</p> <p>Description</p> <p>Improve Banner Data Quality by implementing new audit reports</p> <p>Start Date 9/1/2020 Due Date * 3/31/2021</p> <p>Tasks and Outcome</p> <table border="1"> <tr> <td></td> <td>Description: Build a report to ensure student records are complete to improve data quality by 10%</td> <td>Target: 10 %</td> <td>Start Date: 10/1/2020</td> <td>Due Date: 11/30/2020</td> </tr> </table> <p>Add Tasks or Outcome</p> <p>Visibility</p> <p><input checked="" type="checkbox"/> Allow other users to see and align</p> <p>Cancel Save</p>		Description: Build a report to ensure student records are complete to improve data quality by 10%	Target: 10 %	Start Date: 10/1/2020	Due Date: 11/30/2020
	Description: Build a report to ensure student records are complete to improve data quality by 10%	Target: 10 %	Start Date: 10/1/2020	Due Date: 11/30/2020			

	Step	Steps to Execute												
8	<p>Example of SMARTER goal with a task with a target outcome and task without a target outcome</p>	<p>Create Goals</p> <p>Enter details or import using the SMART Wizard or the Library.</p> <p>All fields marked "*" are required</p> <p>Performance Goals *</p> <p>Improve Banner Data Quality by implementing new audit reports</p> <p>Description</p> <p>Improve Banner Data Quality by implementing new audit reports</p> <p>Start Date 9/1/2020 Due Date * 3/31/2021</p> <p>Alignment</p> <p>Not currently aligned</p> <p>Align</p> <p>Tasks and Outcome</p> <table border="1"> <thead> <tr> <th>Description:</th> <th>Target:</th> <th>Start Date:</th> <th>Due Date:</th> </tr> </thead> <tbody> <tr> <td>Build a report to ensure student records are complete to improve data quality by 10%</td> <td>10%</td> <td>10/1/2020</td> <td>11/30/2020</td> </tr> <tr> <td>Build a report to verify student enrollment in course</td> <td></td> <td>1/1/2021</td> <td>3/31/2021</td> </tr> </tbody> </table> <p>Add Tasks or Outcome</p> <p>Visibility</p> <p><input checked="" type="checkbox"/> Allow other users to see and align</p> <p>Cancel Save</p>	Description:	Target:	Start Date:	Due Date:	Build a report to ensure student records are complete to improve data quality by 10%	10%	10/1/2020	11/30/2020	Build a report to verify student enrollment in course		1/1/2021	3/31/2021
Description:	Target:	Start Date:	Due Date:											
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Build a report to verify student enrollment in course		1/1/2021	3/31/2021											

	Step	Steps to Execute
9	<p>Select Add Goals when you need to enter additional goals into the system. When you have saved any new goals, the system will display status 'New-Please Review.'</p> <p>Review the goals and tasks by selecting the more link.</p> <p>Click Options to print a copy of your Goals.</p> <p>You have now completed 50% of the goal setting conversation process.</p> <p>Click save and continue to move to the Professional Development section.</p>	

	Step	Steps to Execute
10	<p>Add a Professional Development Activity by selecting Add Objective.</p>	 <p>2020/2021 Goal Setting Conversation-Training Options ▾</p> <p>Overview Goal Setting Professional Developm...</p> <p>Individual Contributor 9/1/2020 - 3/31/2021</p> <p>50%</p> <p>Professional Development Plan Add Objective</p> <p>One of the ways to build institutional knowledge and organizational capacity is through professional development. To ensure that our institution keeps pace with the current standards, trends and changes in our profession, staff are encouraged to seek learning opportunities for professional growth. Achievement of professional development goals also support staff in making meaningful contributions to their team and in their efforts to progress their career.</p> <p>Learning opportunities to support individual development may include: workshops, books, webinars, conferences, professional development opportunities available through the Ontario Tech University Learning Catalogue, stretch assignments, cross-training, or Leadership Development programming at Ontario Tech University.</p> <p>Back Save and Exit Submit</p>
11	<p>Enter the development objective title.</p> <p>Select development objective from the objective category dropdown.</p> <p>Click Save.</p>	 <p>Add/Edit Objective ×</p> <p>Objective Title * Complete an advanced excel skills training so I can complete more advance analysis on trends</p> <p>Objective Category Development Objectives</p> <p>Cancel Save</p>

	Step	Steps to Execute
12	<p>When the Professional Development activity has been entered, select the drop down to add an action step for completion.</p>	
13	<p>Complete Action Step Title and select activity category from the drop down.</p> <p>When the action step is completed, click Submit.</p> <p>For each professional development activity, you wish to complete, click Add Objective</p> <p>Click Submit when all objectives have been entered.</p>	

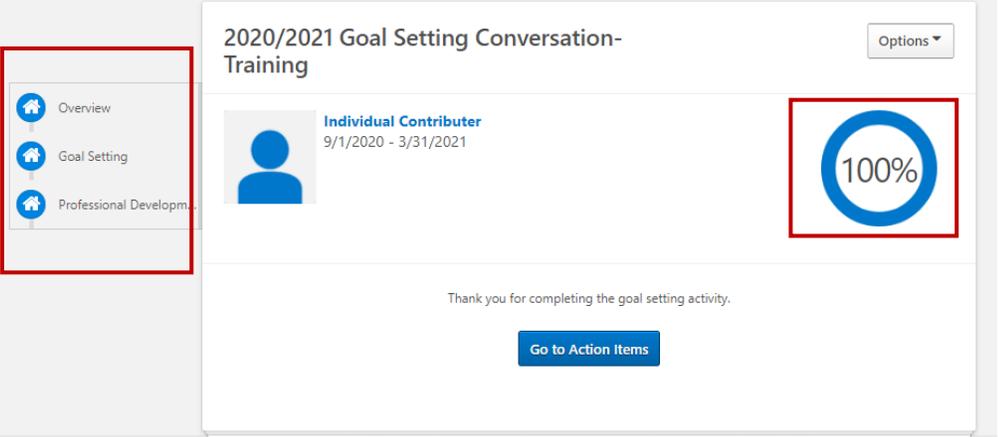
	Step	Steps to Execute
14	<p>The submit button will send the workflow notification to your manager to review your Goals and Professional Development Plan.</p> <p>You will receive confirmation that the Goal Setting Conversation action item is complete and submitted to your Manager for Review and Feedback.</p>	

Table 1: Goal Setting Conversation