

My HR Connection PerformanceTraining Guide Manager – Step 1 Goal Setting Conversation



Revision History

Version	Date	Description
1.0	July 13, 2018	Initial Draft
1.1	Sept 6, 2018	Revised for Pilot Launch
1.2	March 25, 2019	Logo update and Branding
1.3	Sept 3, 2020	Updated with Process change



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1. Introduction

1.1. Objectives

This guide will serve to assist a Manager to:

- Understand the Goal Setting Conversation
- Successfully complete their required action items in My HR Connection



Figure 1: Goal Setting Conversation Business Process



2. Goal Setting Conversation

2.1. Goal Setting Conversation

In advance of Goal Setting, Managers and Employees meet to discuss what the employees plans to accomplish in their role over the next performance development cycle. Goal setting conversations are a collaborative process between the employee and the manager.

The following identifies points for discussion during the Goal Setting Conversation meeting:

- How does your role contribute to the "bigger picture"; consider the department, faculty, and/or university strategic plan and service to our students and/or partners of the university.
- Review the university's mission, vision, values and priorities and consider how goals 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?



3. Goals Setting Approval Process

The manager receives a new My HR Connection Action Item when an employee completes and submits their Goals and Performance Development Plan for approval. As a manager you will:

- Review and approve goals
- Review and approve professional development plans

	Step	Steps to Execute
1	Manager receives email notification to Approve Goals set by their employee(s).	Hore Performance Welcome Paople to Raly2Gether. Resources Construction, major conversations with the managers have meaningful construction, with the managers have meaningful construction, with the managers develop employees considering to unservise the state of the second stat
	Select the link in the email and Login using your Banner ID and Network Password.	Your Action Items Out Action Items
	The My HR Connection Welcome Page will launch.	In Lynda com the following can assist with your conversations and preparations
	From "Your Action Items" widget, select Goal Setting Conversation for your employee.	



	Step	Steps to Execute	
2	Each goal is displayed for your review.		2020/2021 Goal Setting Conversation- Training
	Select the More link to view all tasks related to achieving the goal.	Goal Setting Professional Developm Approval	Individual Contributer 9/1/2020 - 3/31/2021
			Goal Setting Add Goals
			Successful conversations begin with solid preparation. Consider what you plan to accomplish in the next year. Set 3 to 5 goals for the upcoming Performance Development Cycle. Refer to the "Setting Goals" handout and resources on the Welcome Page for how to set SMART goals.
			Develop procedures guide to support how to process transactions in new system
			New - Please Review Develop procedures guide to support how to process transactions in new system
		ſ	Progress: 0% Status: On Track Start Date: 9/1/2020 December 3/31/2021 000000000000000000000000000000000000
3	Select Edit if changes are required and add any applicable comments to	Comise	Progress: 0% Status: On Track Start Date: 9/1/2020 Due Date: 3/31/2021
	each goal.		Tasks Start Date Due Date Progress
		Goal Setting	Build a report to verify student enrollment in course 1/1/2021 3/31/2021 0%
	Click Save and Continue to complete your review.	Approval	Outcome Target Start Date Due Date Actual Build a report to ensure student records are complete to improve data quality by 10% 10 % 10/1/2020 11/30/2020 20 %
			Comments:
			B I U S x, x* I x, II II HE HE E E E Font → Size → A → Q→ SF ← → X ∩ @ @ @ @ @ @ There may already be a report that you can modify so you don't have to start from scratch.
			Back Save and Exit Save and Continue



	Step	Steps to Execute
4	The Professional Development Plan identifies each Professional Development Goal for your employee and is displayed for your feedback and review.	Queryiew Coverview Goal Setting Individual Contributer 9/1/2020 - 3/31/2021 33%
	Select Edit and add any	Professional Development Plan Add Objective
	Select Save and Continue	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.
	to complete your review.	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.
		Complete an advanced excel skills training so I can complete more advance analysis on rends - (Development Objectives)
		Complete Excel Training Class Due: 12/31/2020 Category: LinkedIn Learning Progress: 0%
		Improve industry knowledge of analytics - (Development Objectives)
		Join analytics group Image: Due: 11/30/2020 Category: Professional Conference Progress: 0%
		Back Save and Exit Save and Continue



	Step	Steps to Execute
5	The Approval is completed by selecting the check box and clciking Sign to apply your e-signature.	Image: Source of the second
	Add any comments or your initials and click Submit.	Professional Developm Approval Please provide an e-signature to acknowledge the completion of this step. Manager
	You will receive a message that you will not be able to modify once you have submitted.	I achowledge that providing my electronic approval is equivalent to signing this Sign Course t and I understand that my electronic signature is binding. Course Manual Signature on the printable version Comment
	Select Submit to complete the process if no modifications are required.	
		Back Save and Exit Submit
		Submit Review ×
		You will not be able to modify once you have submitted. Are you sure that you want to submit now?
		Cancel



:	Step	Steps to Execute
6	The workflow is now complete.	2020/2021 Goal Setting Conversation- Training
	Click Go to Action Items to finish any other tasks you may have waiting or for additional team members.	 Overview Goal Setting Professional Developm Approval Individual Contributer 9//2020 - 3/31/2021 Individual Contributer 9//2020 - 3/31/2021 The setting activity. Go to Action Items

Table 1: Goal and Performance Plan Approval