



My HR Connection Performance Training 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

Table of Contents

1.	Introduction.....	4
1.1.	Objectives.....	4
2.	Goal Setting Conversation.....	5
2.1.	Goal Setting Conversation.....	5
3.	Goals Setting Approval Process.....	6

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:

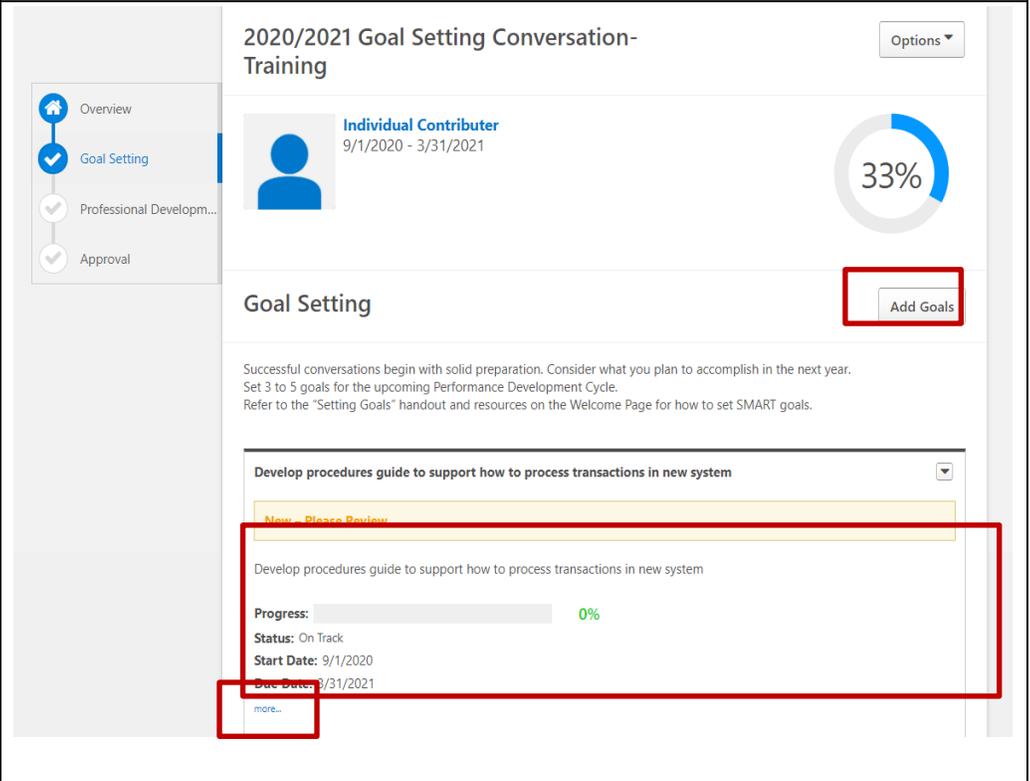
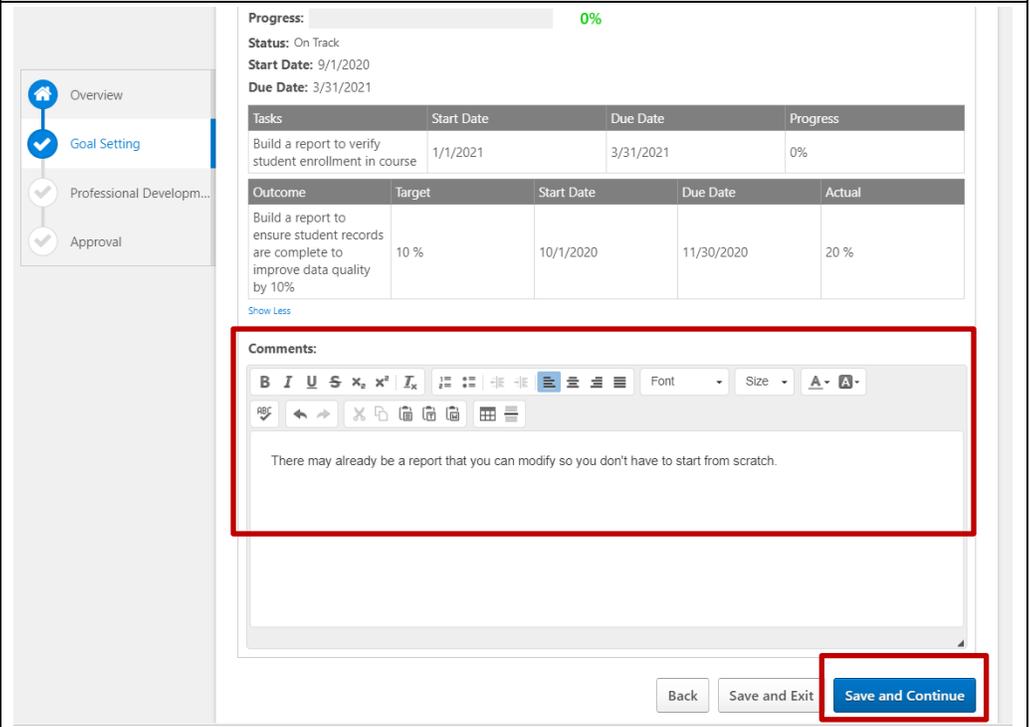
- How does your role contribute to the “bigger picture”; consider the department, faculty, and/or university strategic plan and service to our students and/or partners of the university.
- Review the university’s mission, vision, values and priorities and consider how goals align.
- How can you in your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

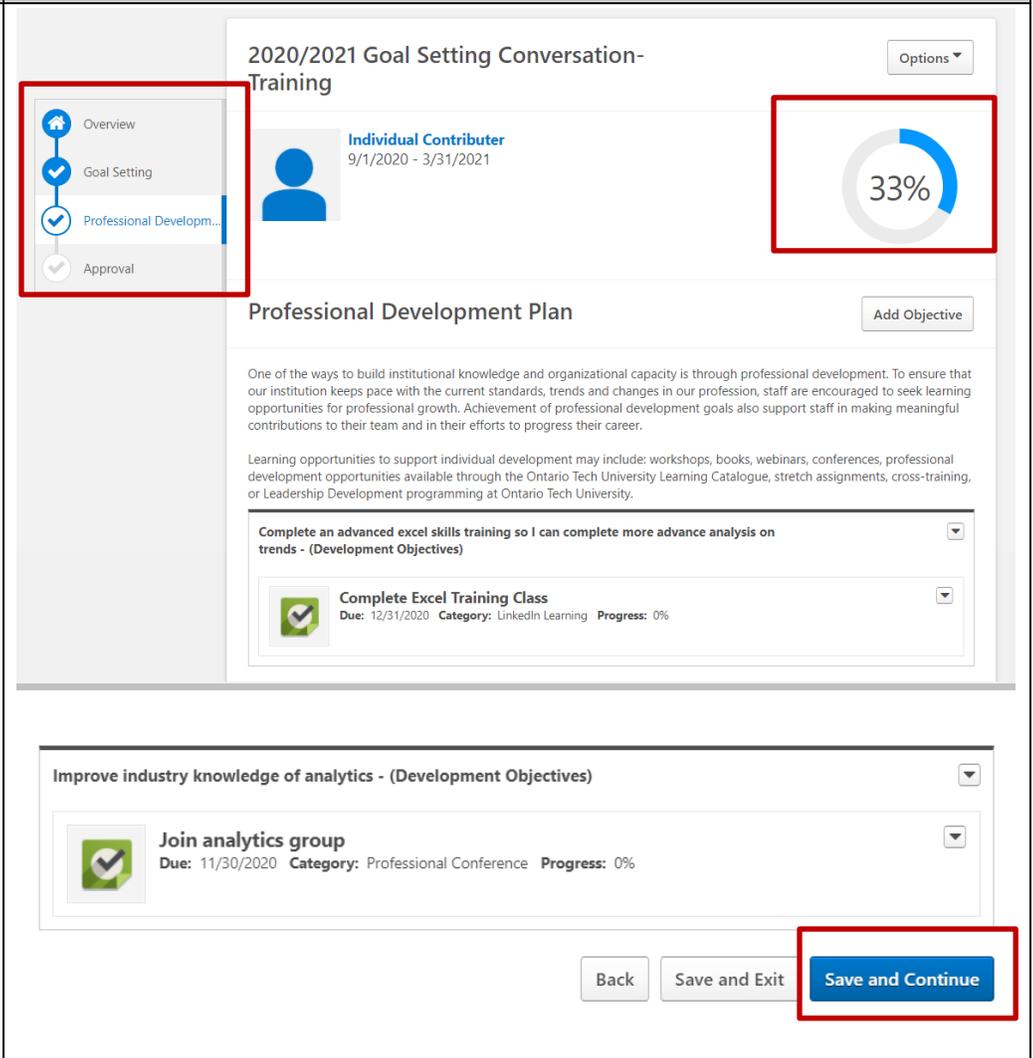
3. Goals Setting Approval Process

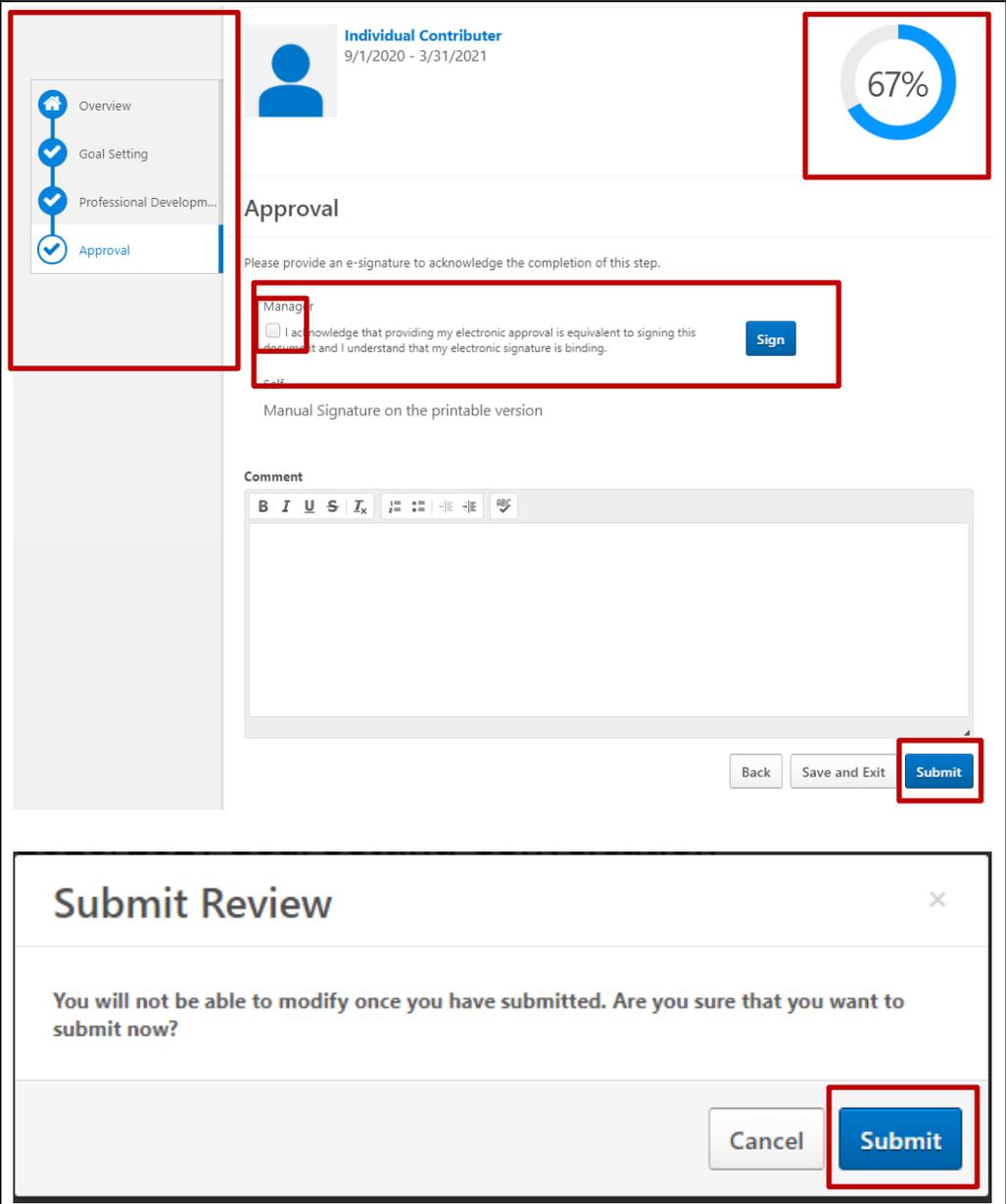
The manager receives a new My HR Connection Action Item when an employee completes and submits their Goals and Performance Development Plan for approval. As a manager you will:

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

Step	Steps to Execute								
<p>1 Manager receives email notification to Approve Goals set by their employee(s).</p> <p>Select the link in the email and Login using your Banner ID and Network Password.</p> <p>The My HR Connection Welcome Page will launch.</p> <p>From “Your Action Items” widget, select Goal Setting Conversation for your employee.</p>	 <p>The screenshot shows the 'Performance' section of the Rally2Gether interface. It includes a 'Welcome' message, a 'Resources' sidebar with icons for Learning, Goal Setting, Lynda.com, PRAISE, Coaching and Feedback, FAQ, Vision, and Strategic Plan. The main content area features a 'Your Action Items' table with the following data:</p> <table border="1"> <thead> <tr> <th></th> <th>Due Date</th> </tr> </thead> <tbody> <tr> <td>Goal Setting Conversation for Individual Contributor</td> <td>9/11/2020</td> </tr> <tr> <td>Goal Setting Conversation</td> <td>9/30/2020</td> </tr> <tr> <td>Goal Setting Conversation</td> <td>10/1/2020</td> </tr> </tbody> </table> <p>Below the table is a 'Featured Information' section with the following text:</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>At the bottom of the page, it says: 'For support, please contact rally2gether@uoit.ca'</p>		Due Date	Goal Setting Conversation for Individual Contributor	9/11/2020	Goal Setting Conversation	9/30/2020	Goal Setting Conversation	10/1/2020
	Due Date								
Goal Setting Conversation for Individual Contributor	9/11/2020								
Goal Setting Conversation	9/30/2020								
Goal Setting Conversation	10/1/2020								

Step	Steps to Execute
<p>2 Each goal is displayed for your review.</p> <p>Select the More link to view all tasks related to achieving the goal.</p>	
<p>3 Select Edit if changes are required and add any applicable comments to each goal.</p> <p>Click Save and Continue to complete your review.</p>	

Step	Steps to Execute
<p>4 The Professional Development Plan identifies each Professional Development Goal for your employee and is displayed for your feedback and review.</p> <p>Select Edit and add any applicable comments.</p> <p>Select Save and Continue to complete your review.</p>	

Step	Steps to Execute
<p>5 The Approval is completed by selecting the check box and clicking Sign to apply your e-signature.</p> <p>Add any comments or your initials and click Submit.</p> <p>You will receive a message that you will not be able to modify once you have submitted.</p> <p>Select Submit to complete the process if no modifications are required.</p>	 <p>The screenshot displays the 'Approval' step of a process. On the left, a navigation menu includes 'Overview', 'Goal Setting', 'Professional Developm...', and 'Approval' (which is selected). The main content area shows the user's profile as 'Individual Contributor' with the dates '9/1/2020 - 3/31/2021'. A progress indicator shows '67%' completion. Below the profile, the title 'Approval' is followed by the instruction: 'Please provide an e-signature to acknowledge the completion of this step.' There is a 'Sign' button and a checkbox for acknowledgment. A 'Submit Review' dialog box is overlaid at the bottom, with the text: 'You will not be able to modify once you have submitted. Are you sure that you want to submit now?' and 'Cancel' and 'Submit' buttons.</p>

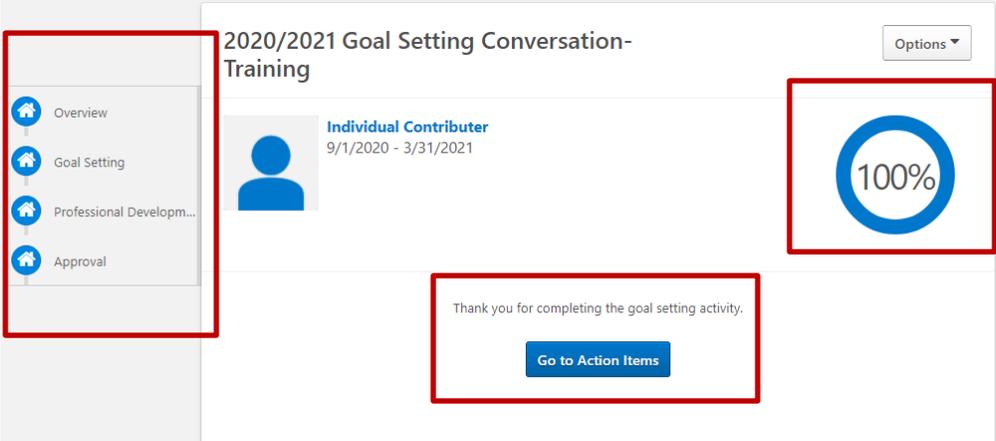
Step	Steps to Execute
<p>6 The workflow is now complete.</p> <p>Click Go to Action Items to finish any other tasks you may have waiting or for additional team members.</p>	 <p>The screenshot shows a user interface for '2020/2021 Goal Setting Conversation-Training'. On the left is a sidebar with four menu items: 'Overview', 'Goal Setting', 'Professional Development...', and 'Approval'. The main area shows a user profile for an 'Individual Contributor' with a date range of '9/1/2020 - 3/31/2021'. A large blue circle indicates '100%' completion. Below this, a message says 'Thank you for completing the goal setting activity.' and a blue button labeled 'Go to Action Items' is present.</p>

Table 1: Goal and Performance Plan Approval