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Workday Workshop:

Goal Setting
For **Managers** and **Employees**

Duration: 30 minutes

Access Workday through the VUMC Network or VPN

To access all the features and functionality of Workday, you must be on a VUMC network – either by being onsite or by using VPN (BIG-IP Edge Client)
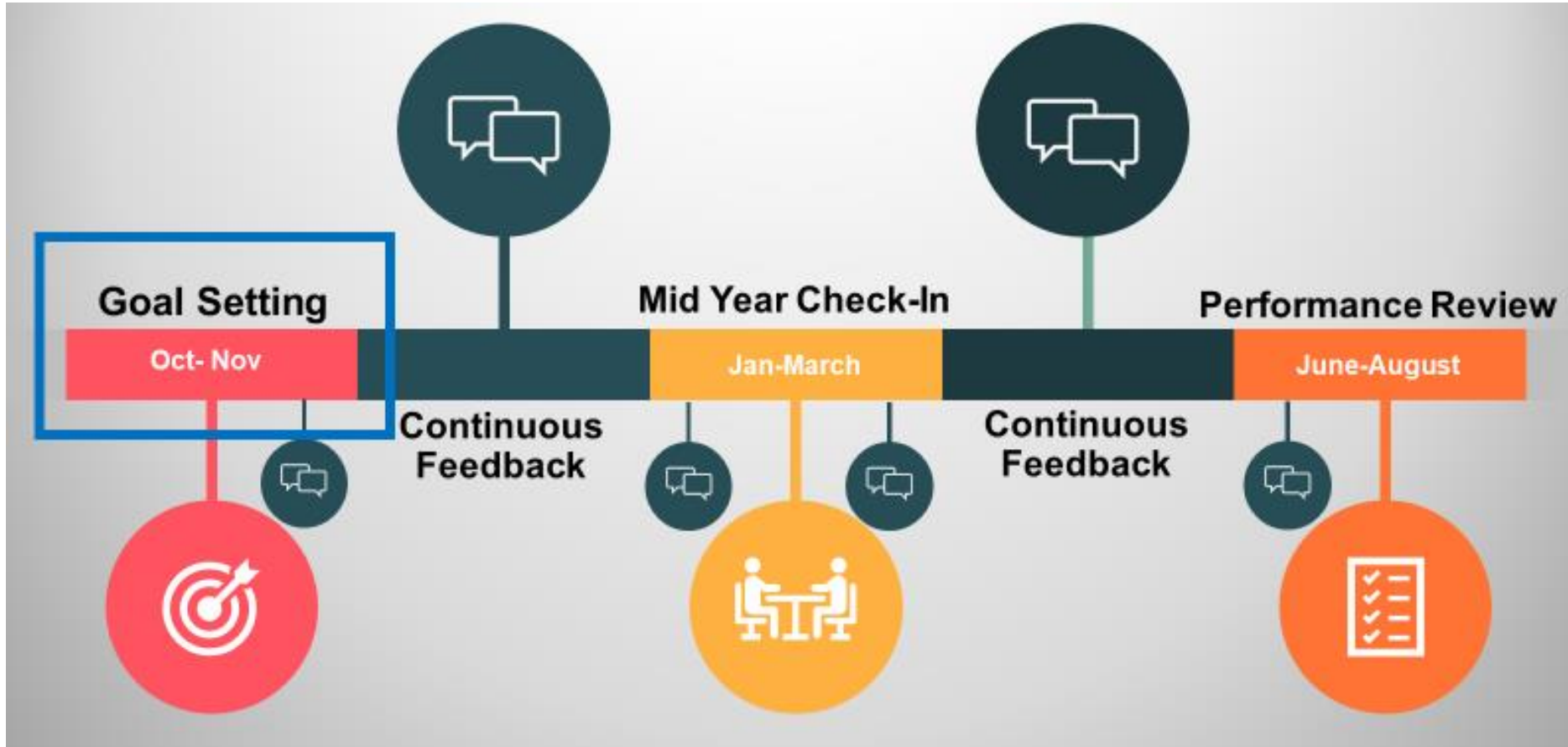

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Workshop Agenda

- Review the Evaluation Timeline

- **Managers**
  - Responsibilities
  - Set Goals on Behalf of Employees
  - Review and Archive Goals

- **Employees**
  - Responsibilities
  - Manage Assigned Goals
  - Add, Review, Edit, and Archive Goals

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Sample Evaluation Process Timeline

Note: This timeline is subject to change annually.

Manager

Manager Responsibilities

As a leader, you are responsible for:

1. Identifying the best way that employee(s) can contribute to VUMC.

2. Setting goals for the supervisory organization (i.e., Department), team, and/or employee.

3. Sharing relevant goal information with employee(s) in existing forums: 1:1 or team meetings, huddles, rounding opportunities, etc.
   - What are the goals?
   - How do the goal(s) contribute to VUMC's overall mission?
   - What does success in completing the goal(s) look like?

4. Discussing Expectations:
   - Who is responsible for entering goals, setting appropriate goal weight in WD, and archiving goals from the past fiscal year (leader or employee(s))?

5. Tie goals to enterprise goals.

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Editable vs. Non-Editable Goals

Editable Goals

Keeping the Editable box selected allows you and your employee to edit the goal after it has been assigned. You may want to edit for any of the following reasons:

- Change in business environment.
- Change in responsibilities.
- Update the weight.
- Change the goal category.

Editable vs. Non-Editable Goals

Non-Editable Goals

Deselecting the box next to editable will make the goals appear like this image in the system. Some problems that may arise are:

- You can only update the Status and Milestones in the goal.
- To remove or change the goal, you can only Archive the goal, causing you to start over on another goal.

Set Goals on Behalf of Employees
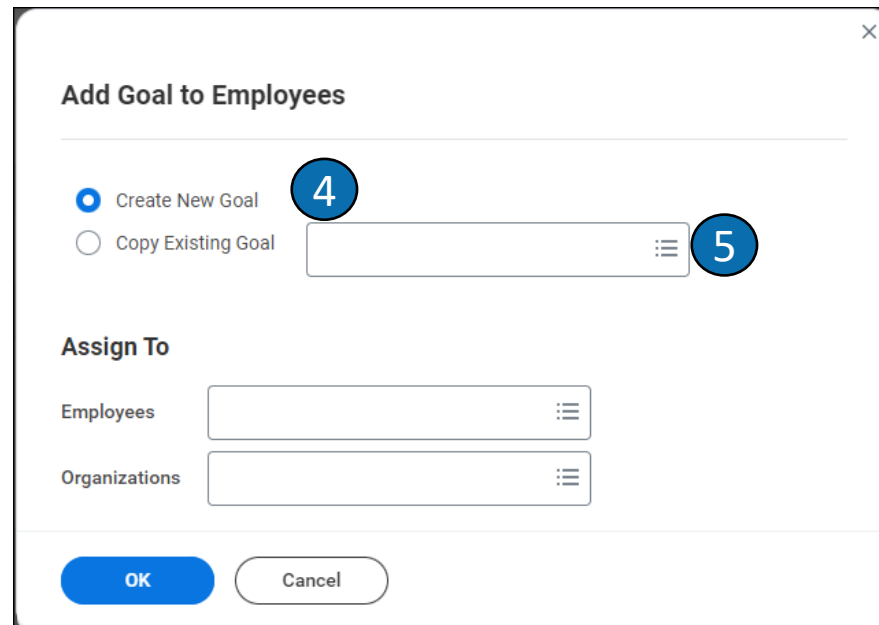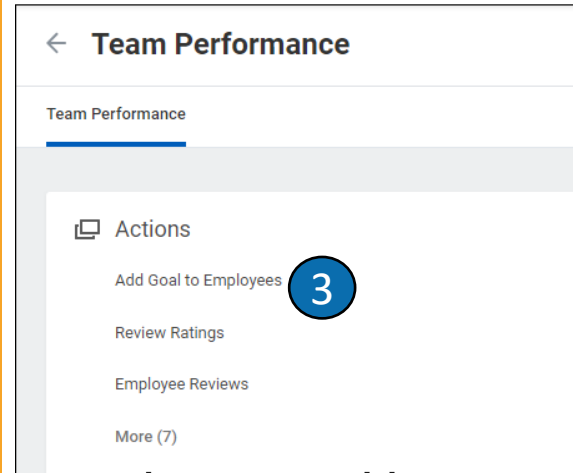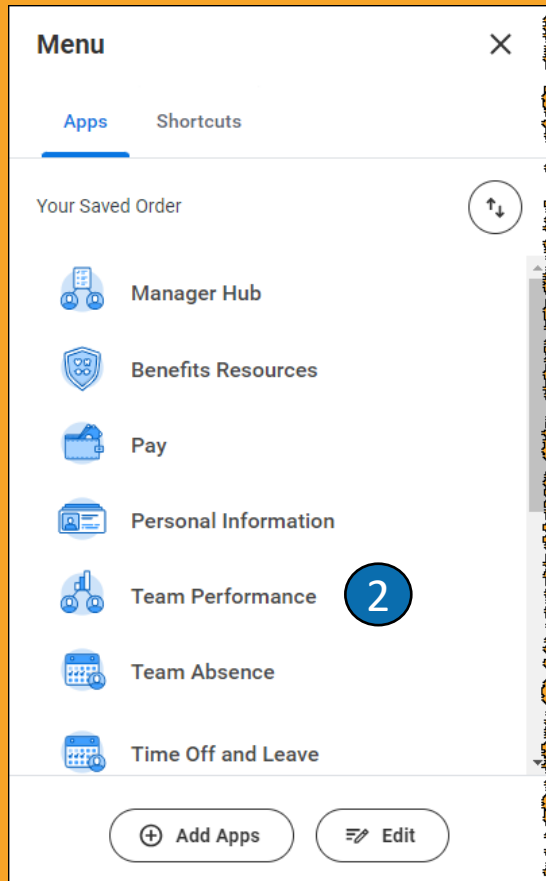
To Set Goals on Behalf of Employees:
1. Select **Menu**.
2. Select **Team Performance**.
3. Select **Add Goals to Employees**.
4. Follow the steps on **Slide 9** to **Create a New Goal**.
5. Follow the steps on **Slide 10** to **Copy an Existing Goal**.

Create New Goal

1. Ensure that **Create New Goal** is selected.
2. Select individual or multiple **employee(s)** or assign the goal to an **Organization**.
3. Select **OK**.
4. Enter the **Goal Title** and optional **Description**.
5. Select the appropriate **Category**, Performance or Development. Definitions given on **Slide 12**.
6. Next to Supports, select which **Pillar Goal** this supports. Use steps from **Slide 11** for more instructions.
7. Enter the **Weight** of the goal. The total weight of all goals should equal 100.
8. Select the **Due Date** of the goal.
9. Ensure that the **Editable** box remains checked. If unchecked, the manager and employee will not be able to edit.
10. Select **Submit**.

Note: You can add multiple goals using the **Add** button. Use the **Remove** button to delete a goal.

Copy Existing Goal

1. Select **Copy Existing Goal** and use the steps on **Slide 11** to choose a **Pillar Goal**.
2. Select individual or multiple **employee(s)** or assign the goal to an **Organization**.
3. Select **OK**.

Note: The **Goal Title**, **Description,** and **Supports** will auto-populate based on your selection in **step 1**. They can be edited if needed.

4. Select the appropriate **Category**, Performance or Development. Definitions given on **Slide 12**.
5. Enter the **Weight** of the goal. The total weight of all goals should equal 100.
6. Select the **Due Date** of the goal.
7. Ensure that the **Editable** box remains checked. If unchecked, the manager and employee will not be able to edit.
8. Select **Submit**.

Note: You can add multiple goals using the **Add** button. Use the **Remove** button to delete a goal.

Selecting a Pillar Goal

To select a **Pillar Goal** (Workday refers to these as **Organization Goals)**, follow these steps:

1. Next to **Copy Existing Goal** or **Supports** (located in the goal form), select the prompt button.
2. Select **My Organization Goals**.
3. Select **Office of the CEO Department.**
4. Select **FY2024 Pillar Goals**.
5. A list of the Pillar Goals will appear. Select the appropriate **Pillar Goal**.

Goal Categories
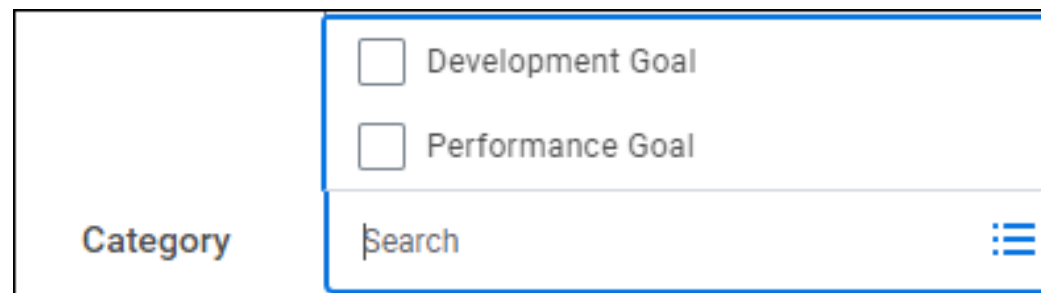
Performance Goals

- Linked to an employee position's key responsibilities
- Align with VUMC Pillar Goals and Department Goals

Development Goals

- Focus on building new skills, knowledge, and abilities to improve current job performance
- Prepare for future career opportunities

Category	Search
	☐ Development Goal
	☐ Performance Goal

Note: Only Performance Goals should be weighted.

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Archive a Non-Editable Goal

Follow the steps to archive a goal if the Editable box was unchecked:

1. From the Team Performance App, select **More(7)**, and then **Archive Goals**.
2. Select the appropriate **worker**, then select **OK**.
3. Next to the goal you wish to archive, select the check box.
4. Select OK.

The goal is now archived and will not appear.
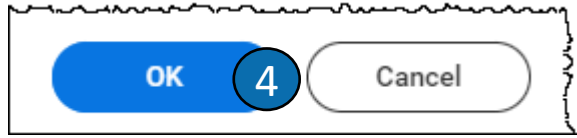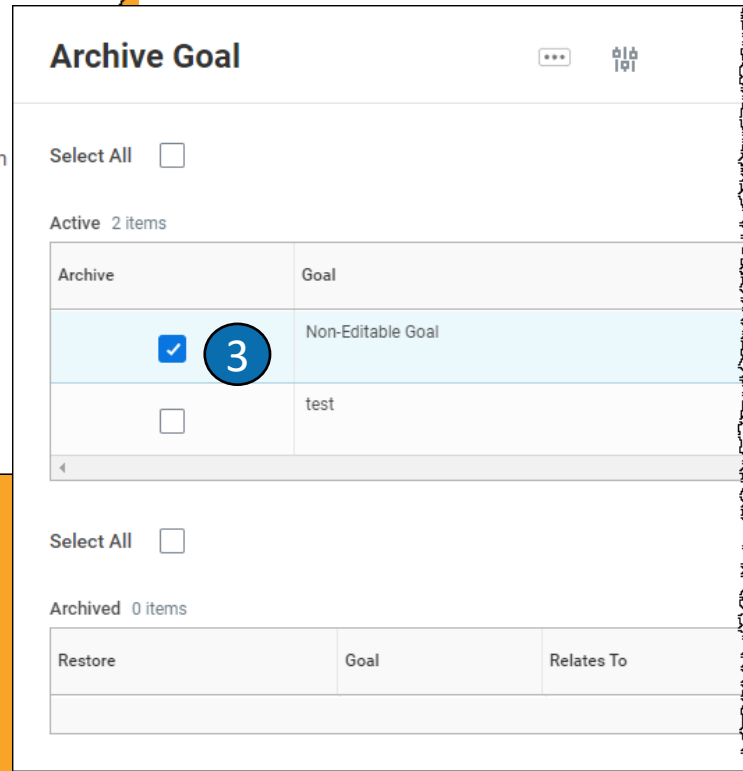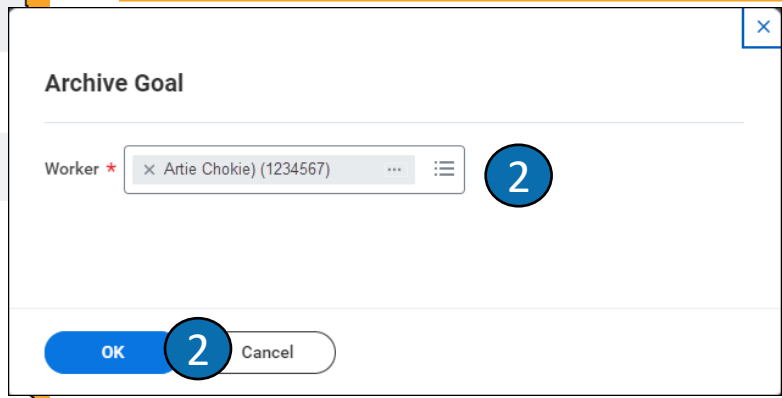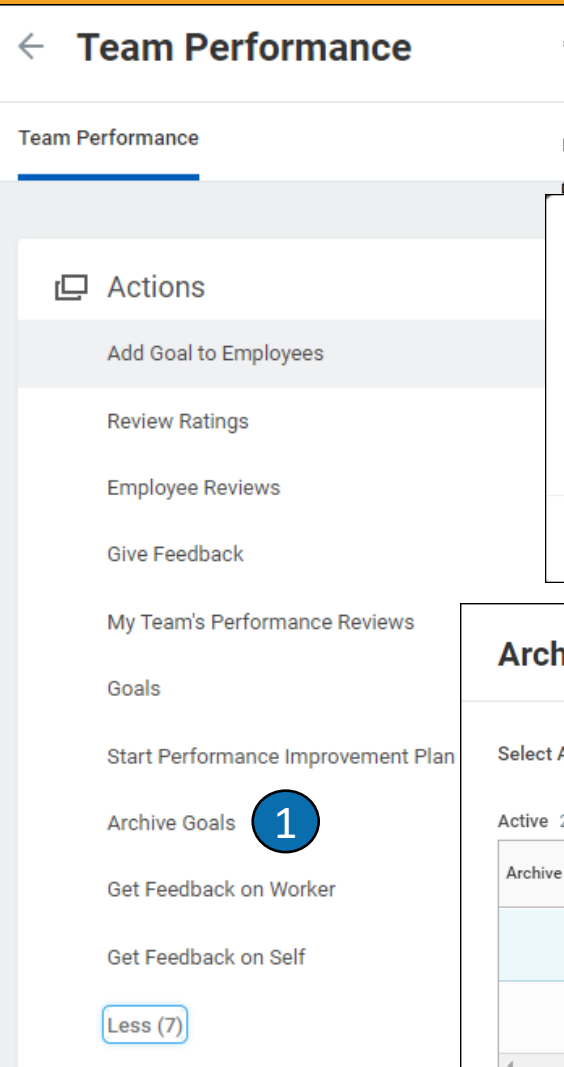
Archive Goals

You may need to archive a goal when:
- A goal is non editable and has an error
- A new goal setting period has started, and your goals are from the previous evaluation cycle.

Follow the steps to archive a goal
1. From the Team Performance App, select **More(7)**, and then **Archive Goals**.
2. Select the appropriate **worker**, then select **OK**.
3. Next to the goal you wish to archive, select the check box.
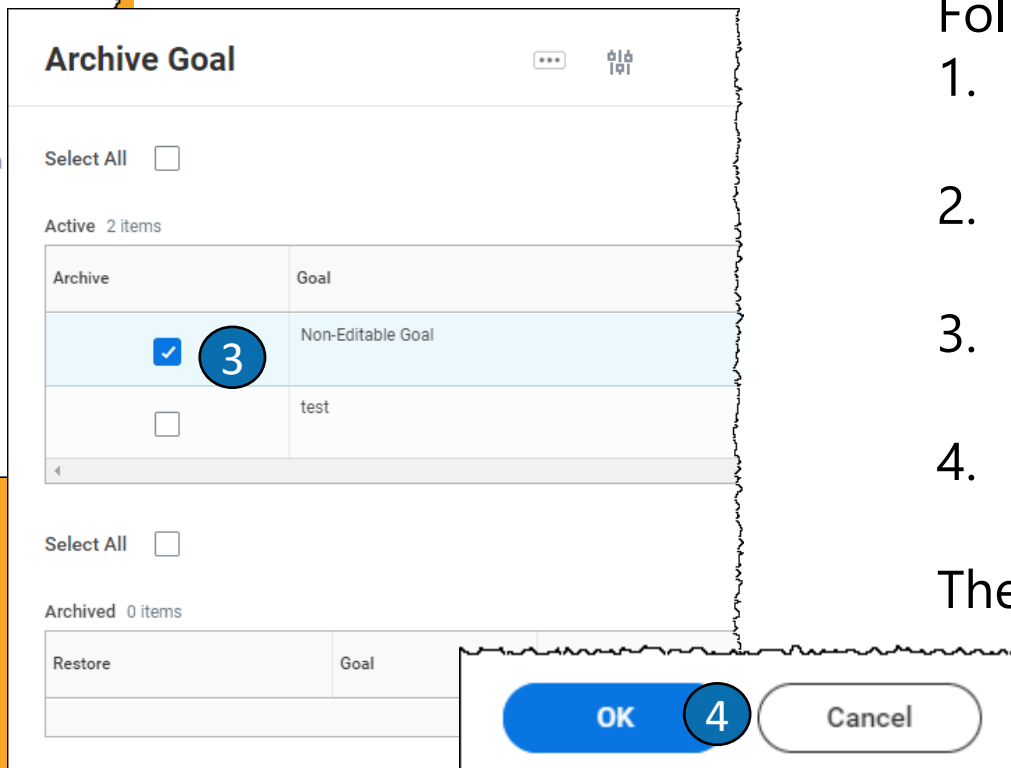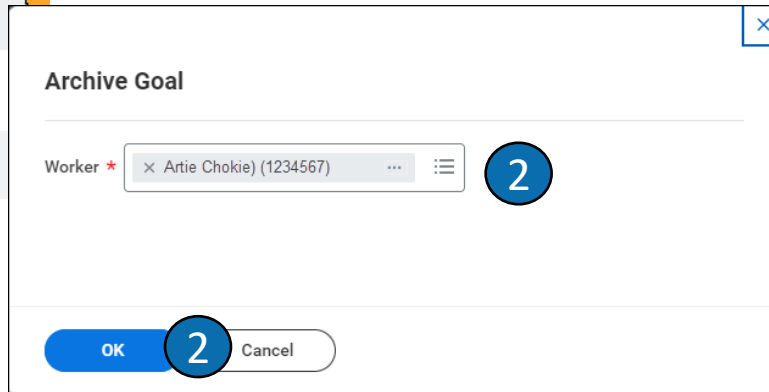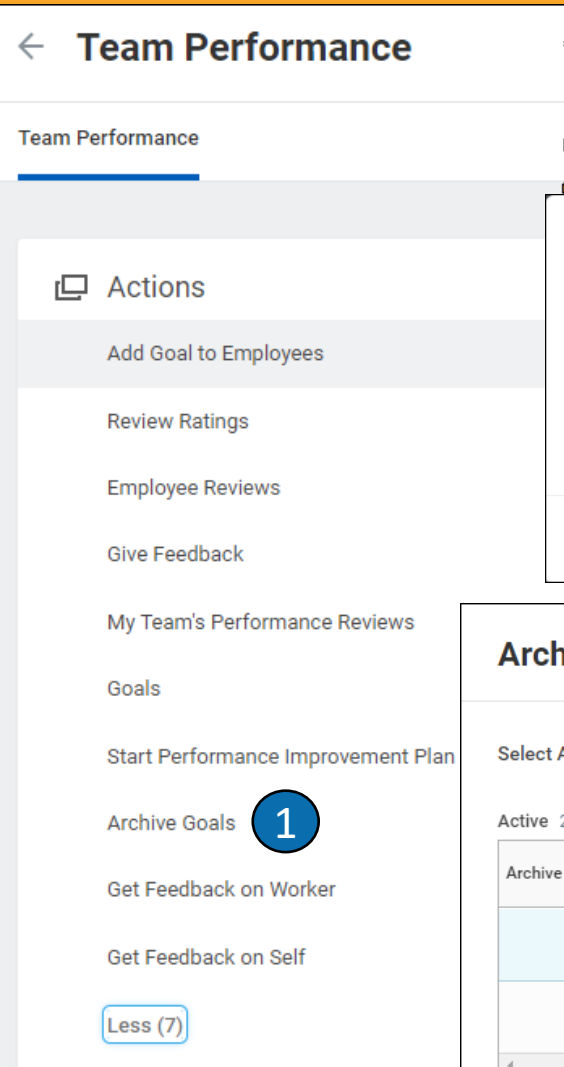4. Select OK.

The goal is now archived and will not appear.

Employee

Employee Responsibilities

As an employee, you are responsible for:

1. Checking in with your manager during existing forums (e.g., 1:1 meetings or team meetings, huddles, rounding) on who is responsible for entering goals into Workday and archiving goals from the previous fiscal year.

2. If applicable, entering goals into Workday.

3. Archiving goals from the previous fiscal year or if asked, noneditable goals.

4. Confirming that the weight of all goals add up to 100. If a goal is not editable and impacts the overall total goal weight, reach out to your leader about the situation.

5. Discussing with your manager any edits made to your assigned goals (e.g., goal title, description, weight).

6. Asking questions to make sure you have the information needed to accomplish your individual goal(s).

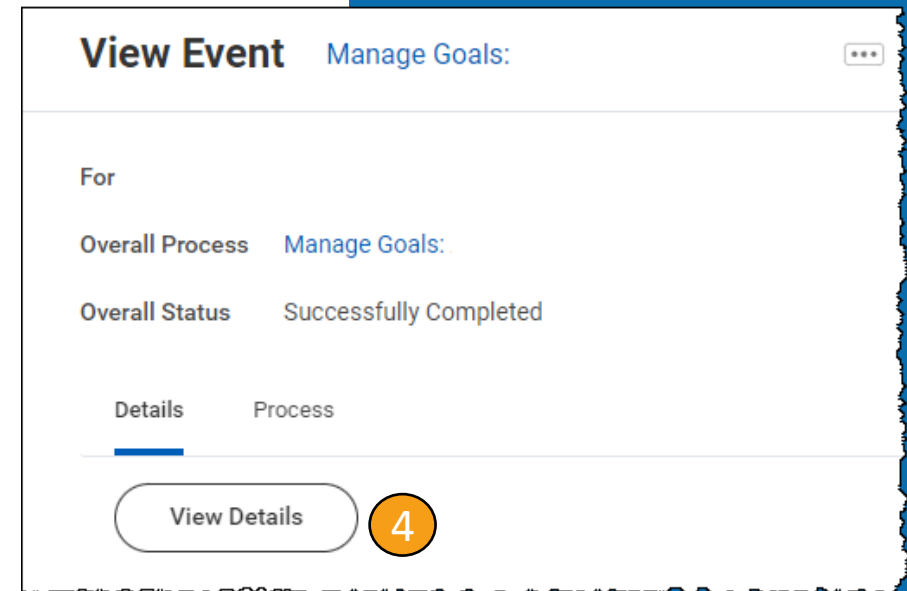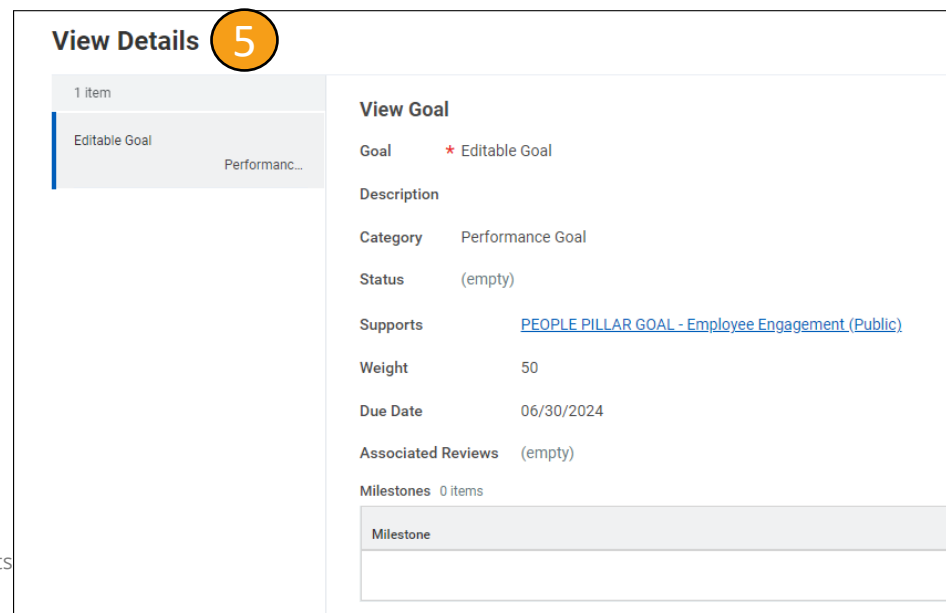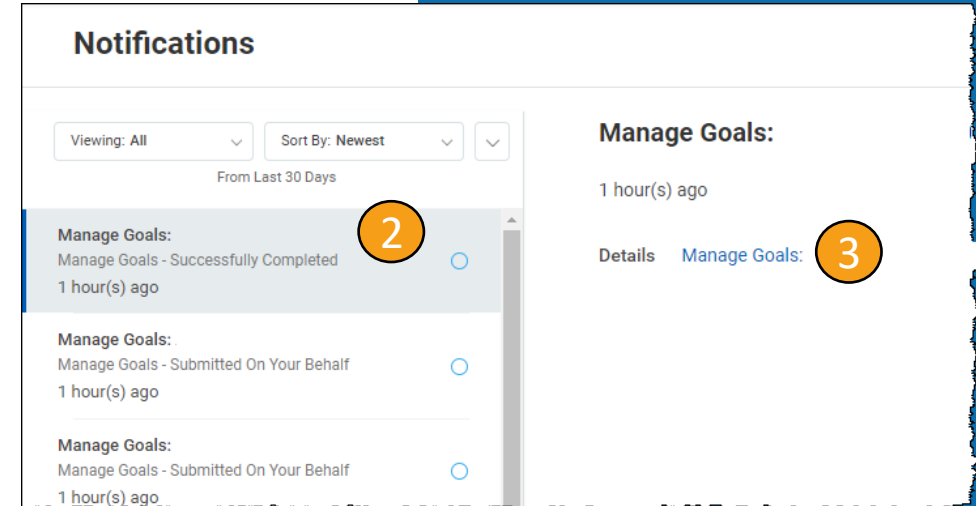7. Meeting the goal expectation(s) set out for you.

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Manage Assigned Goals

When a manager assigns a goal, the employee will receive a notification.

1. Select the **Notifications** icon.
2. Select the **Manage Goals Notification**.
3. Select the link next to **Details**.
4. Select **View Details**.
5. An overview of the goal will be visible. Alternate ways to view goals are on the following slides.

Notifications

Viewing: All   Sort By: Newest
From Last 30 Days

Manage Goals:
Manage Goals - Successfully Completed
1 hour(s) ago

Manage Goals:
Manage Goals - Submitted On Your Behalf
1 hour(s) ago

Manage Goals:
Manage Goals - Submitted On Your Behalf
1 hour(s) ago

Manage Goals:
1 hour(s) ago

Details   Manage Goals:

View Details

1 item

Editable Goal
Performanc...

View Goal

Goal	* Editable Goal
Description	
Category	Performance Goal
Status	(empty)
Supports	PEOPLE PILLAR GOAL - Employee Engagement (Public)
Weight	50
Due Date	06/30/2024
Associated Reviews	(empty)
Milestones	0 items

Milestone

View Event   Manage Goals:

For

Overall Process   Manage Goals:

Overall Status   Successfully Completed

Details   Process

View Details

myworkday

Review All Goals

You can review your assigned or created goals from your Workday profile.

1. Select the **Profile** icon.
2. Select **View Profile**.
3. Select **Performance**.
4. All of your goals will be listed on the left. Selecting a goal will show you the details of that goal.
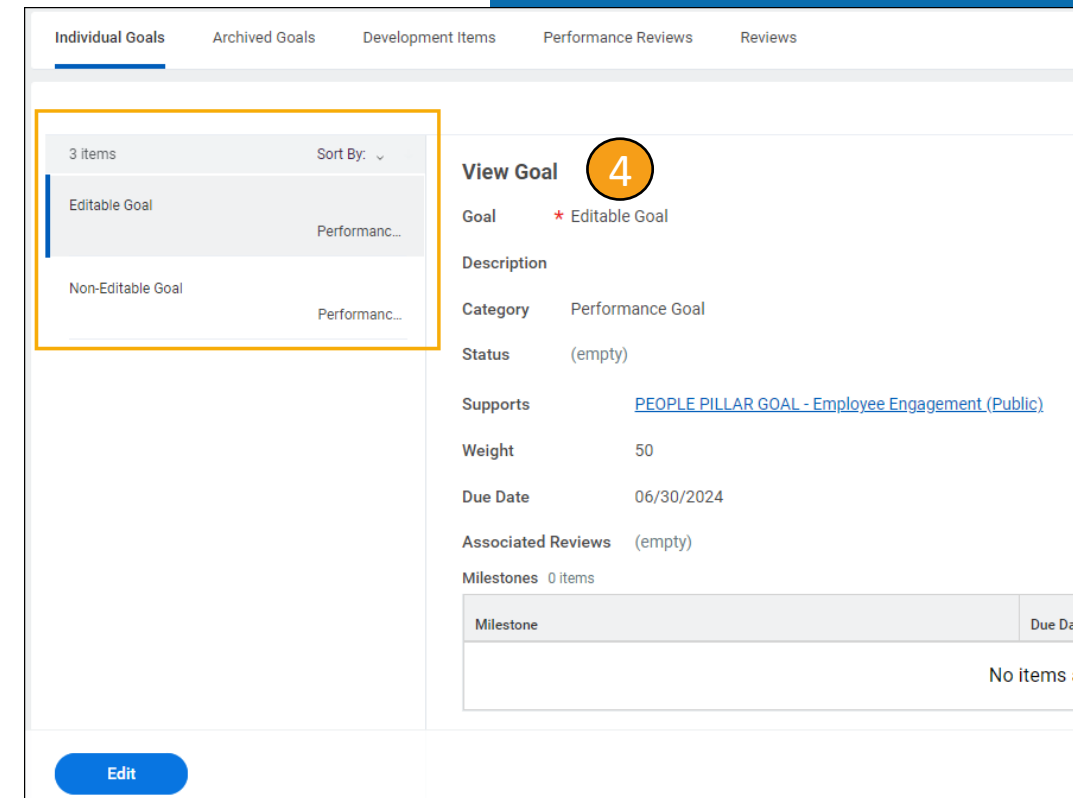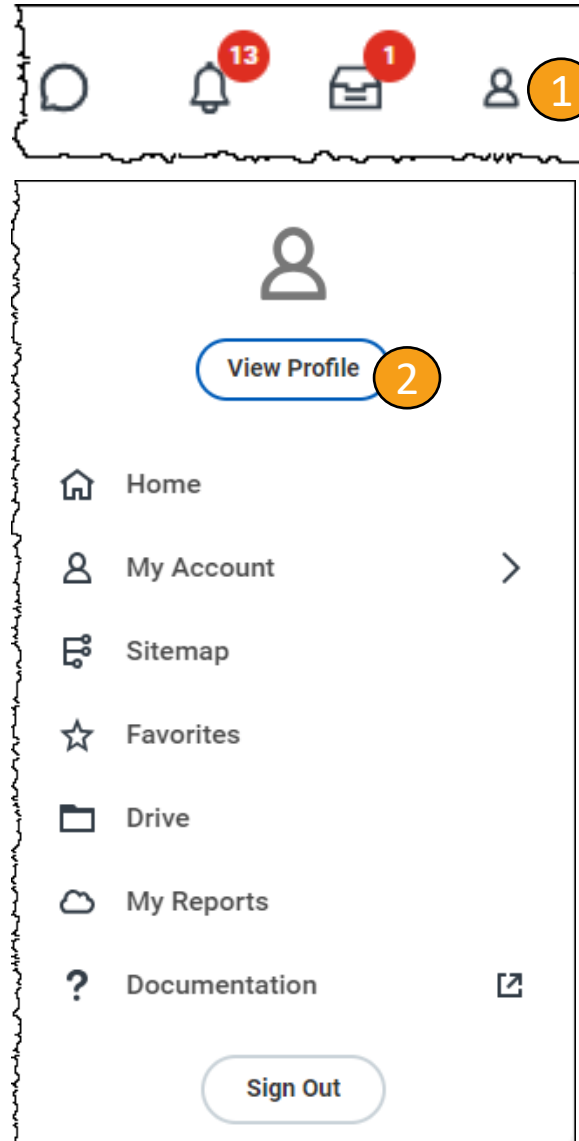
Edit Existing Goal

1. From the **View Goals** page, select **Edit**.
2. You can edit any of the fields on the page. Employees can update the **Status** of their goal and can also add **Milestones**.
3. When you are done editing a goal, select **Submit**.

Add New Goal

1. From the **View Goals** page, select **Edit**.
2. Under Individual Goals, select **Add**.
3. Insert a **Goal name**, **Description**, **Category** (Slide 12), **Status**, **Supports** (Slide11), **Weight** (Total goal weight should not exceed 100), **Due Date**, and any **Milestones.**
4. When you are done adding a goal, select **Submit**.

Archive Goal (Employee)

When a new goal period starts, the previous FY's goals will need to be archived.

1. Type **Archive Goals** to the search bar.
2. Select the **Archive Goals Task**.
3. Under **Archive Goal**, ensure that the listed worker is yourself. Select **OK**.
4. Select the **check box** to the left of the goal you wish to archive.
5. Select **OK**.

Note: You can restore any archived goals by using the field below.
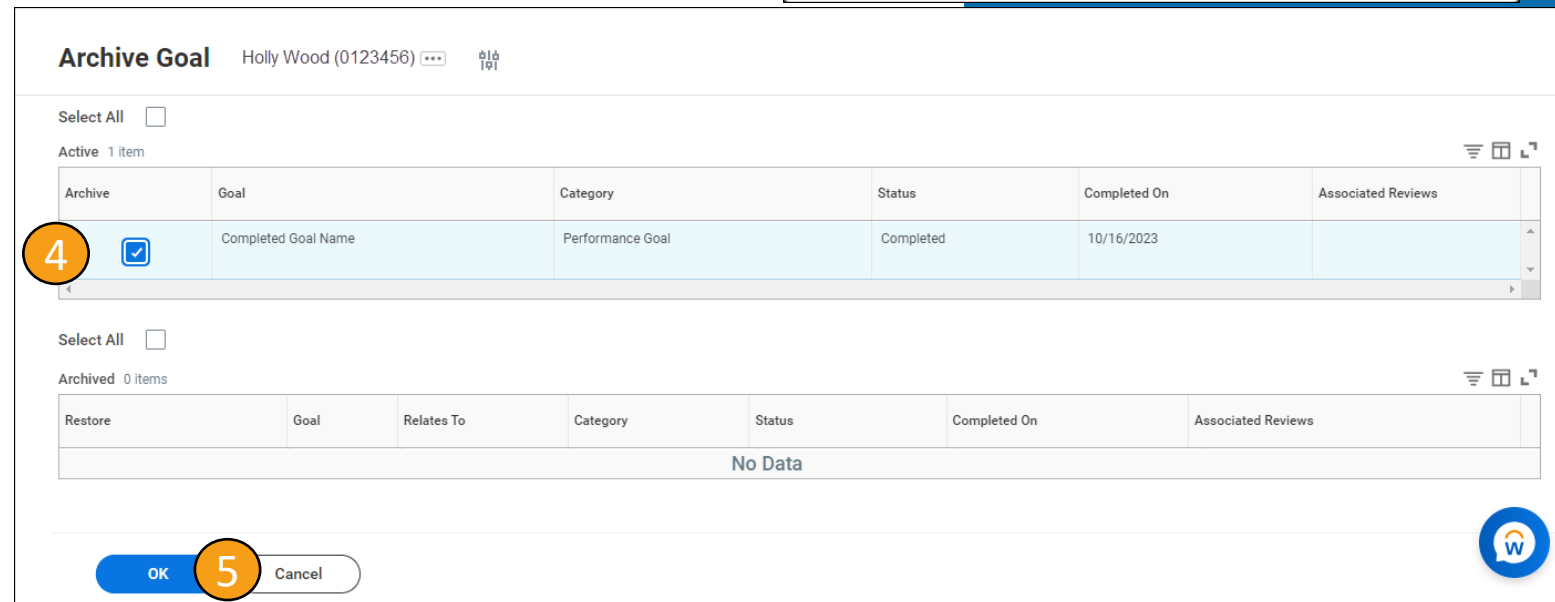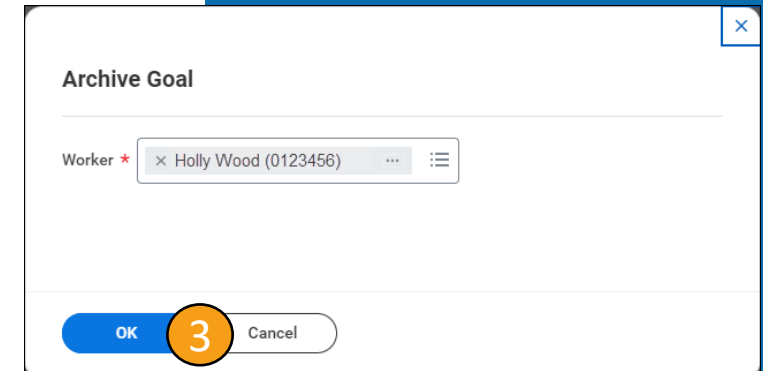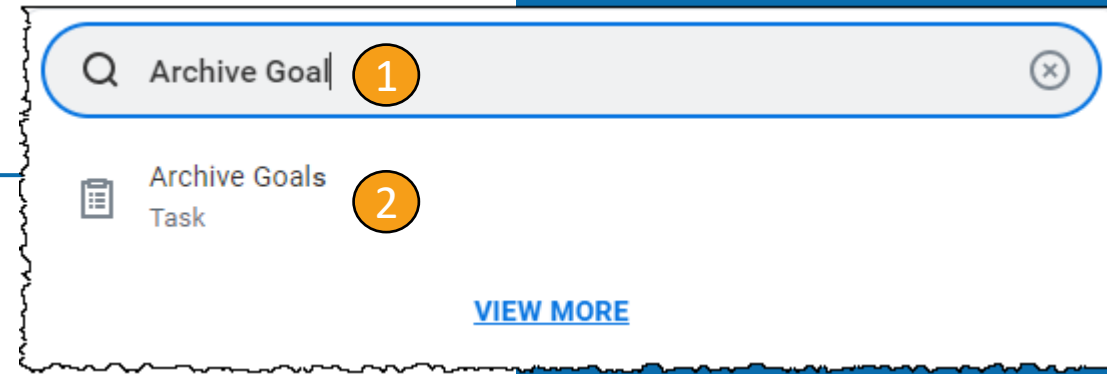
Conclusion

Key Takeaways

Managers

- Identify the best way that team members can contribute to VUMC's overall mission.
- Share with team whether goals will be assigned or team members are expected to enter their goals.
- Set expectations.
- If entering goals, align performance goal(s) to Pillar Goals.
- Ensure that the Editable box remains checked so that the managers and employees can make changes to the goal, if needed.

Employees

- Confirm with your leader whether you are expected to enter goals.
- Confirm that the weight of all goals adds up to 100.
- If entering goals, align performance goal(s) to Pillar Goals.
- Discuss with your leader any edits you have made to assigned goals.
- Archive goals from the previous fiscal year if they are no longer relevant.

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Resources

WDHR_801_Setting Goals in Workday (Employees)

WDHR_802_ Setting Goals in Workday (Managers)

QRG_Manage Assigned Goals and Add New Goals

QRG_Setting Goals on Behalf of Employees

Setting SMART Goals

If you need information about your entity goals, please reach out to your chain of command.

Questions?