Goal Setting Training, HRSTM
Transcript

Okay. I started it. Okay. Okay, good afternoon everyone. My name is Leslie Jones and I'm an HR Internal Consultant and I am going to be leading this session this afternoon on Goal Setting. I have… we have several HR staff in the meeting and I'd like to have them introduce themselves. So, Scott, why don't you go first? Hello, everyone, thank you for coming. My name is Scott Brown. I am the Organizational Development and HR Outreach Manager here at Montgomery College and I will be fielding questions in chat today. Okay. And Carla, you're up next. Hi, everybody, I'm Carla Ammerman. I am the Manager for Employee Engagement and Professional Development, uh, joining you from CT today. And, Chris. Hi, I'm Chris Standing. I'm an HR Specialist and I can't wait to get started on this. Okay, thank you. Um, so, our learning objectives today are to talk about the purpose and types of goals, resources for success, and how to enter goals into Workday.

So, launching right into things. So, Performance Goals are short-term objectives that an employee is expected to achieve within a set period of time. These goals are usually attached to specific job positions and are determined after considering the tasks and duties an employee is required to perform in that position. Performance goals are also… are often a subset of and add up to overall College goals. They let employees know what is expected from their position.

So, you might… you might think to yourself, well, how do I know what my performance goal should be? I mean, how do I determine that? Well, the performance goals, uh, here at Montgomery College, they start with the Strategic Plan. Currently, we have a strategic plan in place, uh, which covers from 2020-2025. The strategic plan cascades from the leadership of the organization down to your unit and the management in your unit. And, um, these things support the walk… the work of the College.

And planning to create your goals, um, you'd want… you… you're going to want to sit down with your supervisor and talk about your goals. You want to consider MC's goals and those of your unit to connect with the mission and strategy of MC. Work collaboratively with your supervisor to begin drafting your goals. And then, once you've come to an agreement about what your goals should be for 2023, um, enter the goals into Workday.

So, that... that is a little bit about performance goals. The other types of goals that we have are Professional Development Goals. Professional development goals are objectives that can set you… you can set for yourself to help further your career. These might include taking steps to learn relevant skills, expand your professional network, or to find more satisfaction at work.

Some ideas of professional development goals are professional development goals [and] can be… can give you an idea of your vision for the future, can help you enhance existing workplace skills, improve productivity, encourage continual growth and lifelong learning, and having professional development goals can help you take advantage of the benefits that MC offers. Some examples of professional development goals would be around learning a new skill expanding your education, building your soft skills, or… and/or developing leadership skills.

So, of course, we just finished the 2023 Performance Evaluation period. Uh, and, so, we're… we're looking forward to 2023, um, in… in August, and this month, we want you to begin to think about your goals. Um, communicate with your supervisor in this planning phase, and next month in September, which is right around the corner, we want you to begin to enter your goals into Workday for 2023. So, goals that are entered by you have to be approved by your supervisor. And we'll see that process in a little while.

I'm sure that you've heard the acronym SMART before, so we want you to make your goals SMART, which means they should be Specific, Measurable, Achievable or Attainable, Realistic, and Time-Bound. So, SMART goals. And if you want more information about SMART goals, there's all sorts of internet information on the internet about SMART goals and helping you to, um, develop those. Also, if I could add into that. There is, um, a, um… oh, sorry, you're just about to say [that] there is a Performance Management Goal Setting course in Workday. Excuse me. [Leslie laughs]. You're getting ahead of me, Scott. [Leslie laughs]. Okay, so, um, there are, um, online resources. So, I'm gonna stop sharing this presentation so that I can switch over to, um, the… I just popped the website. While she does that, I just popped in the website, uh, the link to the performance management website, HRSTM website, which has the links that Leslie was just referring to about today's Zoom meeting and the ELITE class. So, that's in the chat. Okay, so, I want to show you, um, online resources now. Um, so, the first thing we're going to do is type in HR and search, which will bring us to, may we recommend Office of Human Resources and Strategic Plan… uh, Talent Management. We're going to go to Performance Management.

We are used to looking at this, uh, from, um, just doing our performance evaluations, but if we scroll down, uh, you'll see a section on Goal Setting. Uh, here's today's session. Um, there's two mor… more sessions coming up for Goal Setting. This is a self-paced… paced module on Goal Setting that you can take at your convenience. It's offered through Workday, so it's in Workday Learning. You can follow this link. I have a few other trainings to share a little later. So, this is the place that you're going to go for all things performance management-related. Um, we'll be updating, uh, this, um, website with, you know, deadlines and, um, more information about, um, you know, setting goals, um, as we… as we go on in the year. So, I want to go back to my Montgomery College homepage and I want to type in Workday. And it brings up a Workday at MC resource site. We're going to click here. And here's where you're going to be able to find job aids and training for… for the goals. So, we're going to scroll down and here is Talent and

Performance Management. So, we're going to click on here and we're going to scroll down, and there are two job aids right here and here on managing goals. So, this is the… the how to, the step-by-step. You're going to see that the process is really, really simple, but these are the job aids you can use. It's in English and it's in Spanish.

Alright. Um, there are the other, uh, trainings that I wanted to mention, and maybe, um, maybe Scott can put these in the chat because we're not gonna go back to the presentation just yet. Besides the one on Goal Setting, um, there's a course called Success… Successful Goal Setting, also available through, um, Workday, uh, Learning. It's offered through LinkedIn. So, LinkedIn is the… the provider of the course, but it is recommended as another resource. Another LinkedIn learning that is available through Workday Learning is Defining and Achieving Professional Goals. Um, so, um, hopefully, he can put that in the chat for you. So, I am going to stop the share here and I'm going to go on to Workday now. Are there any questions so far or, um, any anything come up yet, uh, Scott? So, what was the first one you mentioned before the Defining and Achieving Personal Goals? What was the first one? Uh, Goal Setting. It's just called Goal Setting, uh, available through, uh, Workday Learning. And I'll pop that in the chat. Thanks. Alright. So, let me, um, let me go back in and share again.

And just to let you know, they're all on the Performance Management webpage. Um, all the resources we're putting on the chat there.

Alright, I'm having a bit of difficulty getting to the EE… Oh, I think I've got it now. Okay. Yep, got it. Okay. Alright, so, um, I am, uh, logged in to sandbox, uh, which is a copy… which is a… a tenant of, uh, Workday, which allows me to go in and play. Um, so, um, yeah, so this is just for demonstration purposes and not everybody has this access. But um, for today's session, I'm going to be using, uh, sandbox. Um, so, um, this is the landing page, uh, for sandbox. And, um, the first thing that we're going to do is to scroll down and click on all… View All Apps. So, from All Apps, I am going to click on Talent and Performance. And then over here, where it says Talent and Performance and More, I'm gonna click on More. And if you're following along, uh, you can follow along with your job aid, if you'd like on this. And then I'm going to choose My Individual Goals.

Okay. So, this is… this is, um, these are my goals. These were actually my goals from last year. And, um, in order to see those over here in this section, I would just click on the one I want to look at and it brings it up. It's a little hard to see because… but, okay. So, um, if you want to add a goal, you would click on add and create the goal. As you can see, the only thing that has a star on it is the goal. So, really, this is the only place that we have to enter any information.

We can add more information including a description. We can choose a category for it. There are five categories: advising, job duties, professional development, service, and teaching. We can choose a status. Oops. Sorry. A status that is in progress. That is completed. No longer applicable.

And, um, earlier, I mentioned that the… the goals trickle down from the Strategic Plan. So, if we were to look at My Organization Goals, and Montgomery College, and the goal period, it brings up those, um, strategic plan goals. Sorry, I lost it. There. Let me bring it back up [Leslie laughs].

Alright, so, here are all the goals in the strategic plan. So, I'm in HR, and a lot of the work that we do has to… is around investing in our employees. So, it's really likely that any goal that I might enter would fit, um, in this goal five, which is in… invest in our employees. A due date. You do want to give yourself due dates for your… your goals.

You know, you can have, um… there isn't a limit or… or an amount of goals that you need to… to create for a year. Um, it can be, um, three goals. It can be more than that. It really just depends on the work that you do and the work that needs to be done in your unit. Um, so, let's just say I'm going to… I'm just going to type something in just to type something in here. And this is the only thing that I have to do, so that's all I'm going to do. And then, I scroll down. Actually, and I hit submit. Well, when you… once you enter in the goal, you can save it for later and then go back and look at it, or you can go ahead and submit it. I'm just going to go ahead and submit it.

Once I do that, it goes into Scott's email box, and then Scott, um, goes in and views my goal and decides, um, if he's going to approve it. He might send it back. He may ask, you know, for more details. Um, but, um, the process like I said, it is really, really very simple. Um, I'm gonna, um, proxy in as… So, let me go through that again before I go to the next step. So, I'm going to go back to, um, my landing page. So, once I log in, this is… this is where it… where, uh, it stopped, where I end up. Um, I'm going to scroll down to View All Apps. I'm going to choose talent and performance. I'm going to expand this. My individual goals. I'm going to, um, I'm not going to add anything more right now. But just to show you how you, um, you get back, um, you know, go through this, the process again. So, I'm going to cancel this, and I'm going to pretend that I'm Scott now. So, I'm going to start a proxy and I'm going to go in as Scott. Oh, there's a lot of Scott. Brown's, I mean. Let's do this. Narrow it down a bit. There we go.

Alright, so, this is, um… this is, um, Scott's landing page, and you can see that there are multiple actions waiting for him to go in and approve my goals. So, I actually have sent him four. So, I'm gonna… I'm gonna pick this one. Actually, I'm gonna pick this one first. I'm gonna expand this. Alright.

Hmm, Scott, why doesn't it…? Um, that's weird. You might want to go back to your inbox and pick a new goal. Pick a new goal? Yeah, go back in. Go back to the beginning and click one of these goals. Oh, okay. And then, yes. See the thing is that this… that was the goal and there's just no information in there because it was just x's and m's. Okay. Well, I did put three in there. Oh, I didn't learn to play pickleball. Okay! I like this goal. Oh, sorry about that, group. Sorry about that. Okay, so because I'm in a, uh, in sandbox, and I'm

playing and… and… uh, I… I put [in there] that I wanted to learn how to play pickleball. Now, is that a SMART goal? Is it specific? Is it manageable? Is it attainable? Realistic? Time-bound? It's not. It's missing some of those components. Uh, let me pick a different goal. Here we go. Eat two to three vegetables, uh, servings of fruits and vegetables a day until October 31, 2022. So, this… this meets all the requirements of a SMART goal. Specific, measurable, attainable, realistic, and time… time-bound. One more. So, if you're a manager, this is what you're going to… to see on your end. And, um, you can, um, you know, choose to, um, you know, if you scroll down, you can see if there's anything more down there. But let's just say that Scott is going to approve this and he's going to add it.

Hmm. Yes, that's just adding to the goal itself. That's added to the goal. I thought… Where's the approval? I thought you were… Oh, it's down below. Maybe you can't see it on your screen. It's just down a little bit lower on the right hand side. Below. Lose 10 pounds by… Oh, I can't… You know what, I can't see it because I…I… Okay, sorry about that. Yeah, no. You can't see it because of the Zoom. Okay. There it is. You can send back… or a little lower, or approve it. Alright. So, he's going to approve it because he wants me to lose weight, right? [Leslie laughs] Oh, I could take that goal for myself. I like that goal. [Leslie laughs] We like the vegetable goal. Alright. So, um, it shows success. And, um, let's go ahead and, um, approve the other ones. Um, well, the… the one about… Let's see. Learn to paint. Now, we're not going to approve that one. So, we're going to approve "eat two three servings of fruits and vegetables a day." And then, we are going to send back, um, the… the one, um, the one that isn't SMART. Uh, needs to be SMART. Uh, so, I'm going to, uh, submit this on Scott's behalf. So, we're going to stop the proxy now and go back to my inbox in Workday.

Hey, while you do that, can I answer a question that came in chat. Yeah, of course. So, there's a question in regards to one making a goal and pushing it out to a whole team. It is possible to do that. Um, we can dig deeper a little bit later. And another question, uh, building on that question is, should college-wide required goals be entered into Workday under the professional development section? Um, so, that would be no. They should be added into Workday under the, um, performance goals or individual goals. Professional development goals are what that individual would like to accomplish for their own career or personal development. But I love that question because it really highlights a point that Les and I really want to put out there is, you know, these goals and the goal formation is a very powerful tool for the leadership team because we wanted to be able to drive strategic, uh, and organizational goals. And then, also with the professional development goals, we wanted to be able to drive engagement and retention. So, I really want everyone to have this conversation with their employees about, hey, you know, what's going to keep you engaged this year? Where do you want to be at the end of this year? Where do you want to be in three to five years? And, what do we need to do to get you there? Um, so, those professional development goals would be like what I need to do individually to advance my career. And the performance goals will be the one that my boss and I are like, hey, I need to xyz these trainings, get these done, or develop something some metric. Thank you, Leslie. Okay, thank you, Scott. Alright. So, we're

back, uh, in sandbox and looking at my inbox. So, we're gonna click on Manage Goals and, um, send back. And, uh, he says that it needs to be SMART. Um, so, um, if you do send back, um, you know, something, uh, to your employee, they'll know exactly what is required to… to correct their goal or to fix their goal. So, let's go back to View My All Apps, Talent and Performance, click on More, My Individual Goals. Alright. So, um, so, these are… these are, uh, all in here now. I want to, um, go back one because I want to look at, um, professional development goals as well. Um, so let me go back here.

Alright. So, professional development goals. Um, of course are… are, you know, designed to help you progress in your career, learn a new skill, build leadership, um, add to your, um, your education. Um, so, um, you… you can check the, uh, you can enter it here. Of course, there's a red dot, so it tells you that this line has to be completed. Um, and also the status. Uh, additional information. You can add a description. Um, you know, all employees should have professional development goals even if it's just one. Um, but, you know, we… we have a rich benefit policy which, um, plan, and… and all sorts of resources for, um, you know, uh, continuing education. And, you know, we really want people to… to take advantage of that. Um, are there any… any, um, specific questions at this point about, um, this process? Like I said, it's really easy. Probably developing your goals will take you much longer and… and take a lot more thought than, um, than actually entering them.

Alright. I just want to go back to the presentation real quick. Here are those additional trainings. The Goal Setting, the Successful Goal Setting, and Defining and Achieving Professional Goals. All through [Workday] Learning. Here is a link to the MC's Strategic Plan. There's currently six goals in place. You can view the, uh, the document online. So, we want to, um, share… oops. You know, if you need help with goals, if your team needs help with goals, you can reach out, contact your designated Human Resources Internal Consultant. You can send an email to performance@montgomerycollege.edu. You can send an email to HRSTM@montgomerycollege.edu. Um, but, you know, we do want you to reach out. We're here to help and, um we want to help you be successful and help your teams be successful. So, that's all I have today. I want to thank you for coming. Thank you, Leslie. I have a question for a couple [messages] in chat. Um, is there any performance measures on the HRSTM website? Performance measures. Um, exactly… exactly, what you mean by measures? And if the person who asked that could chime in that would be great. I don't have anything beyond that. [audience member] Do you mean like… are you talking like metrics? Like, um, like expectations? Like, um… Yeah, I think so.

Yeah, when I look at other organizations, they always have some performance measures. Some of them are, you know, input-based. Some of them are output-based. Some of them are based on quantity. Some of them are based on quality. Some of them are based on, you know, your… just an idea… so, what is Montgomery College looking at when it comes to measuring? And because the goals are the organization goals, right? It's at the highest level and the strategic plan is what we are pulling all this information

from. So, when you try connecting, you know, my individual performance through the performance of the team to the department to all the way to the organization goals, do you have any measures that is out there? That is what I was trying to figure out.

So, we… we… we don't, from HRSTM, we don't set those measures and expectations. That's really something that a unit can develop and implement. So, whatever, um, appropriate measures might be, um, you know, related to IT, you know, you… you can discuss that. You'd want to, you know, share those with your employees so they know what… what the goal is. Um, you know, there are, um, in some areas, there are some certain sort of, um, standard measures, um, like industry standards, um, that the unit will turn to when, um establishing like… like a service area. Um, but it's really something that the IT department and your unit have to sort of tackle. Anything to add there, Scott? Uh, no I think that's spot on. Thank you, yeah. But, Leslie… it's Sophia. Can I just add one thing? I think also on the main, uh, you put it in the chat, Scott, the performance management page, towards the bottom, those rating categories do provide some of that scaling, right? And what the expectation is for each of those levels. Um, and I think [that] was, that [was what] Vorge said, had that question. I think if you're… if you're looking for somewhere to start in terms of, you know, a rating, right? Like how do you apply someone's performance against whatever that goal [is]. I think that's a great place to start because that can apply to everybody and that can be a… a tool anyone can use. Spot on, thank you. And I'll add that to the chat. And there's the link for it.

Um, there is another question. It says… let me go back up to it. Does performance on goals play any role in compensation increases? I seem to remember it used to but not sure if I've seen anything about that in recent years. Uh, it currently does not. Thank you very much. And then, there's a question, is there any way to take advantage of professional development courses that have a cost during the first six months [of] probationary period? Um, so, probationary employees can take advantage of, uh, the courses that we offer, you know, through ELITE, um, but utilizing, uh, EA… EAP funds, um, is after someone successfully passes on probation. Thank you. Um, is, uh, that's the same. Uh, forgive me for asking if it's already been asked, but, are our goals required for every employee? Yes. So, and just to clarify… so, goals are required for every employee. Um, do we have a deadline for entering the goals and to have them approved? So, more information, um, will be, um, shared, um, via email, and… and I would guess on the… on our website, but we would like, um, employees to be thinking about their goals now and entering their goals, um, in next month… in September. Fantastic! Thank you.

And then, um, and we want to highlight the difference between performance goals or individual goals in Workday and the professional development goals. Professional development goals [are] not required. I really do recommend that leaders and employees use them to drive engagement and retention. Um, there is another question. What is this year's deadline? Okay. We talked about that. Are the required trainings listed in Workday current? I see five listed. Well, let's see. I actually submitted a request this morning to change them, so let's see what's there, to answer that question. So,

when you guys want to find your required learning, you can go to, um, there's a memo coming out, so I don't want to jump the gun, but since you're on this training and the question came up, you can click on the required training tile in Workday, and yes, those five classes are part of the required classes, um. So, uh, those five classes are part of the required classes. There's a memo coming out for further clarification on who needs to take what, okay?

And let me double check the chat. Are the required trainings listed in Workday? Uh, alright. Yeah, thank you. Okay, that's all the questions we have. Does anyone else have any thoughts, prayers, wishes? Uh, no, just getting some thank yous. Yeah, great job, Leslie. Thank you so much. Uh, and thank you everyone for your questions. Um, I think you're gonna find adding goals in the Workday very easy. It may have looked a little clunky, but once you get in there, you're like, oh, this is easy. No big deal. Either the employee or the supervisor can start the goal. The supervisor has to approve the goal to make it active in Workday. And, um, yeah, please have these conversations, uh, with you and your team and your direct supervisor and the people that report to you. They're very useful tools. Alright, thank you. Thanks for coming. Take care everyone. Thank you. Fantastic! Thank you so much.