Talent Management: Goals for Managers

Managers can cascade department-based goals or cascade organization goals to their team. Managers can also edit in-progress goals or discontinue a goal that is no longer relevant to the employee. Click on the topics below to jump to the appropriate section. All employees used in this job aid are fictitious.

The timing is very important for when a manager cascades a goal or when an employee writes a goal in relation to HR sending the goal writing template

- Cascading Goal Options and Effects
- Cascade a Goal to an Individual or Team
- Cascade a Goal that was Cascaded to You
- Cascade a Goal Before or After Goal Setting Template is Sent to Team
- Approve Goals
- Edit or Discontinue a Goal
- View Team's Goals (Reports)
- Performance Timeline

Cascading Goal Options and Effects

The timing of when the manager cascases goal and when the employee enters goals can create downstream effects the goal process. Following the timeline suggested by HR is displayed first with other process timelines also displayed.

Recommended process. Least additional steps/tasks.

Manager cascades goals to team by 11/8/19.

HR sends goal template to employee on 11/11/19.

Employee writes additional goals in template, weights all goals and submits to manager.

Manager receives task to review goals/weighting and approve or send back for edits.

Not recommended. Additional work for manager and employee. Employee may need additional communication and job aid.

Manager DOES NOT cascade goals by 11/8/19.

HR sends goal template to employee on 11/11/19.

Manager cascades goals and sends link to employees on how to pull cascaded goal into template.

Employee manually pulls cascaded goal into template, writes additional goals, weights all goals and submits to manager.

Manager receives task to review goals/weighting and approve or send back for edits.

Pro-active employees may have already written goals after the performance conversation. Employee may need additional communication and job aid.

Employee writes goals in the Performance tab on Worker Profile BEFORE HR sends goal task.

Manager cascades goals to team before 11/8/19.

HR sends goal template to employee on 11/11/19.

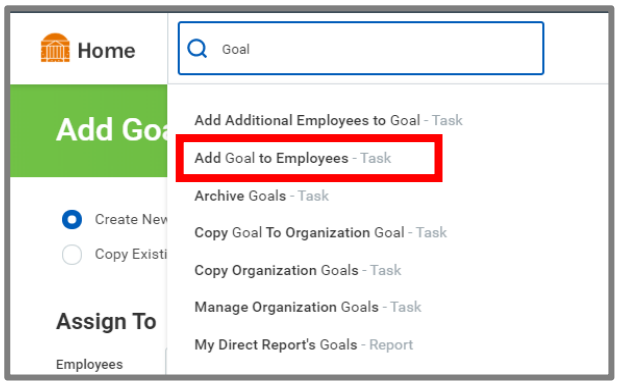
Employee manually pulls own goals into template, weights all goals and submits to manager. See job aid for pulling goals into template.

Manager receives task to review goals/weighting and approve or send back for edits.

Cascade a Goal to an Individual or Team

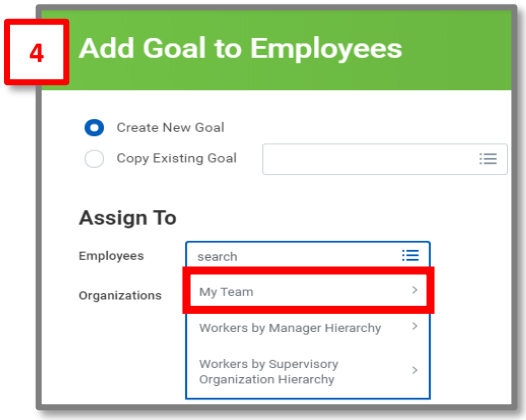
IMPORTANT: Cascading two (2) goals to **Medical Center** team members is required. Cascading goals to **UPG** or **SOM** team members is optional.

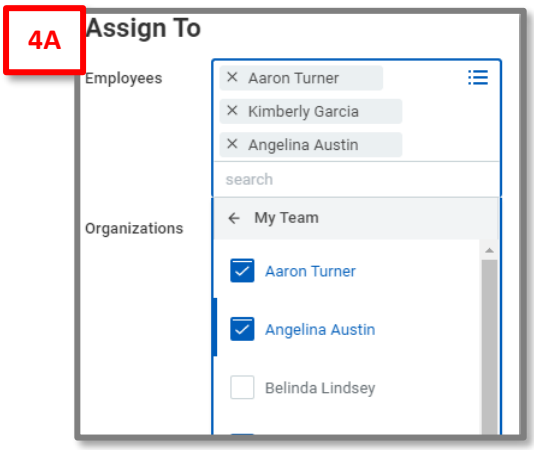
1. Type the word **Goal** in the Workday search field and select **Add Goal to Employees** in the results list.



Screen shot 1: Search results for goals

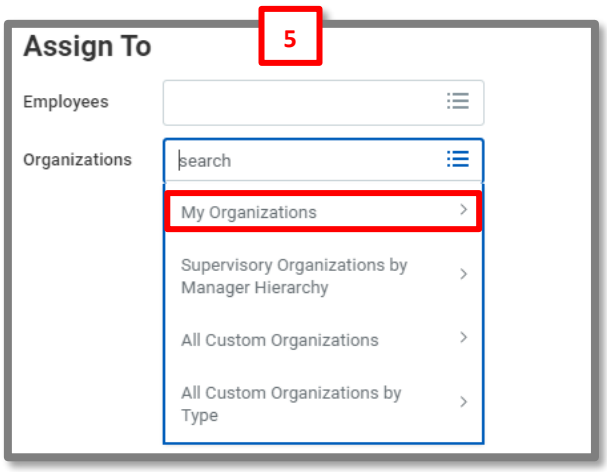
2. **Create New Goal** is pre-selected. For the purposes of this job aid, we will write a new goal.
3. In the **Assign To** section, go to **step 4** to cascade to an individual and **step 5** to assign to a team(s).
4. Click in the **Employees** field and select the **My Team** category.
   A. Select any number of employees and go to **step 6**.

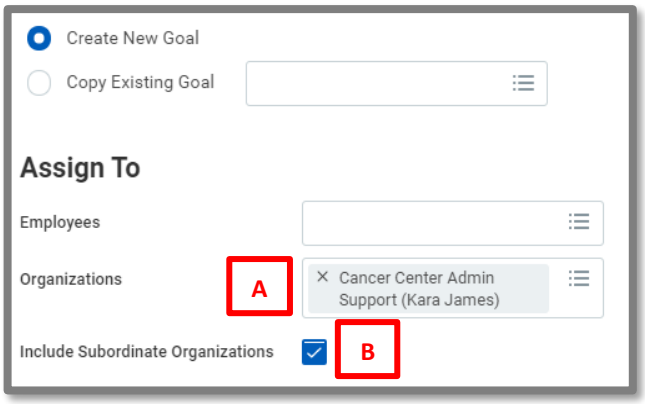




Screen shot 2 & 3: Search results for goals

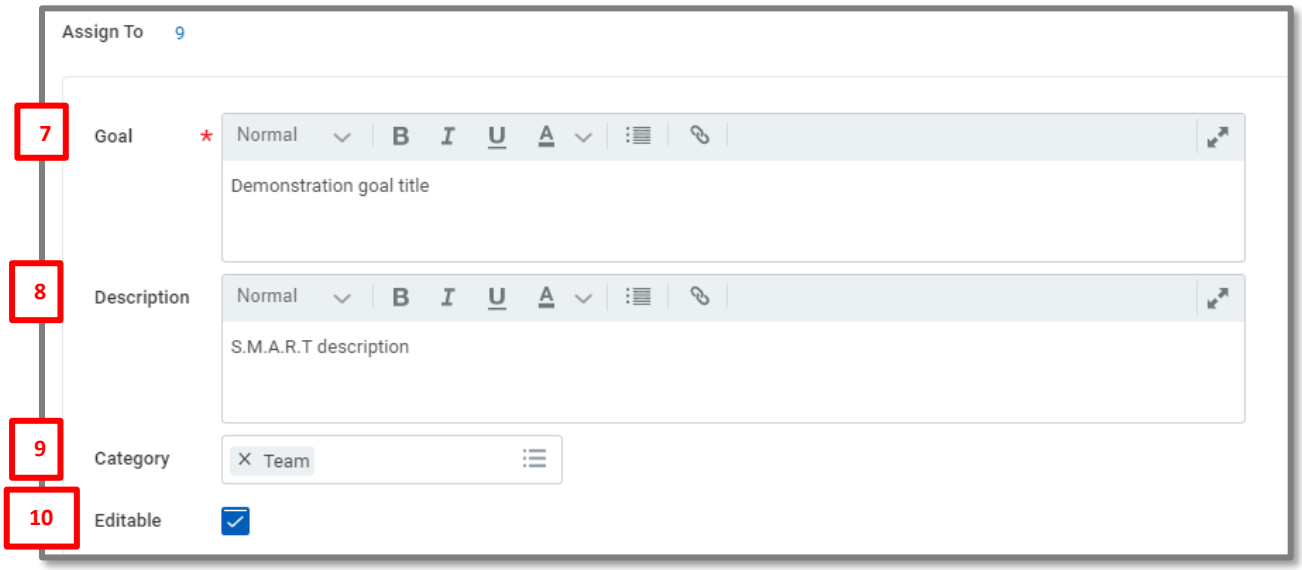
5. Click in the **Organization** field and select the **My Organizations** category.
   A. All supervisory organizations that report to you appear. Select all appropriate organizations.
   B. **Include Subordinate Organizations** will appear. Checking this box will cascade the goal down to all direct reports of managers who report to you.





Screen shot 3 & 4: Selecting manager's organization

6. Click **OK**.
7. Enter a goal title in the **Goal** field.
8. Add a detailed, SMART description (SMART goal information and examples)
9. Click the **Category** box to select between **Team** or **Organizational** goal. (Team = direct reports, Organization = service line or greater)
10. **Editable** will be pre-selected and is recommended. This allows the employee to refine the goal to their role and/or enter updates on their progression. Once edits are submitted, the manager will receive and inbox task to accept or deny the updates.



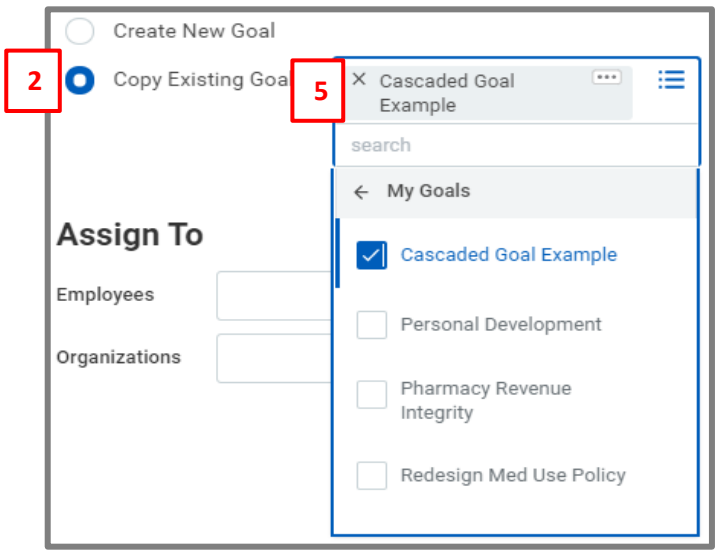
Screen shot 5: Definitions of goal fields

11. Click **Submit**.

Cascade a Goal that was Cascaded to You

Leadership can cascade a goal to you that you may want to cascade down to your team. Your leader has the ability to cascade only to you or to you and those who report to you so you will want to understand which option your leader selected before taking steps to cascade the goal down to your team.

1. Type the word **Goal** in the Workday search field and select **Add Goal to Employees** in the results list.
2. Select **Copy Existing Goal.**
3. Click in the **Copy Existing Goal** field.
4. Select **My Goals**.
5. Select the appropriate goal from your list of existing goals (more than one can be selected).
6. Follow steps **4** or **5** in the Cascade a Goal to an Individual or Team to select the employees who will receive the cascaded goal. Step **5** allows you to cascade to subordinate organizations, in addition to the immediate team.
7. If your leader marked the cascaded goal aseditable, you will be able to customize the goal for your team. You must also mark your goal as editable or not. See **step 10** in the Cascade a Goal to an Individual or Team for details.
8. Click **Submit**.



Screen shot 6: Cascading existing goals

Cascade a Goal Before or After Goal Setting Template is Sent to Team

Before Goal Setting is Launched:

- Your cascaded goal **will** be in the employee's goal setting template.
- Your employee can add, remove, or modify (if editable) goals.

After Goal Setting is Launched:

- Your cascaded goal **will not** be in the employee's goal setting template.
- Your employee will need to add the cascaded goal into the template [Job aid is available]
- It is recommended that the manager explains the need to add the cascaded goal to the template so the employee is able to weight all goals.

Approve Goals

IMPORTANT: Team Members are required to write three (3) goals. When an employee submits a goal, it routes to the manager's Workday inbox for approval. These goals are considered 'Pending Approval' and the employee cannot update or track progress from the Performance tab in the Worker Profile until the manager acts on the approval task. The Manage Goals task includes both the cascaded goal(s) and goals the employee added. Review the employee's entries, including the weighting prior to approving/denying.

Talent Management: Goals for Managers

1. A task titled **Set Content: Employee Name** will populate the inbox.

2. If all goals are acceptable, click the **Approve** button Approve.

   A. Review to ensure 3 SMART goals were written and weighted appropriately.

3. If goals require further details or refinement, click the **Send Back** button Send Back. A reason for sending back must be included before clicking the **Submit** button and returning the task to the employee.

4. Do not select the Deny button if the employee will be asked to rewrite goals. **Deny** deletes the employee's work and they will have to start over.

5. The **Cancel** button will simply close the task. It does not affect the goals.

IMPORTANT: If an employee writes goals from their Performance tab in the Worker Profile, there will be no weighting. Approve the submission and direct them to their inbox task and have the employee pull the goals into the template so they can add weights to each goal. See the graphic decision tree below.

Edit or Discontinue Goals

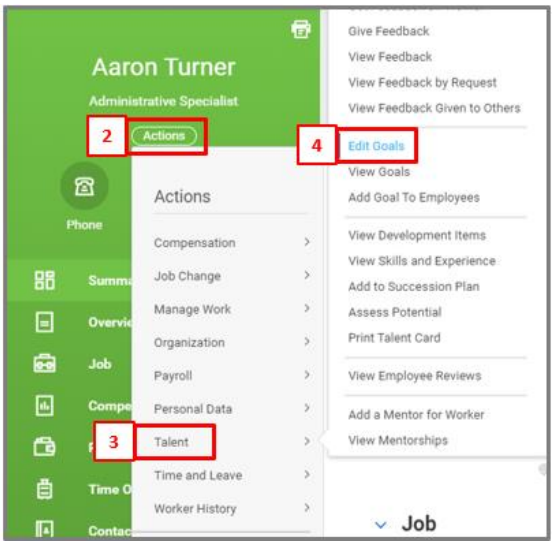
There may be a need to edit a goal that you cascaded to employees. Edits must be completed individually vs. globally. If a goal needs to be removed from all employees on your team, contact AskHR@virginia.edu.

1. To edit, type the employee's name in the search and select the name in the search return.

2. In their **Worker Profile** area, click on the Actions button.

3. Hover over the **Talent** menu item.

4. Select **Edit Goals** in the sub menu.



Screen shot 7: Navigation to Edit Goal area

5. The goals are listed on the left. Select the goal to be edited.

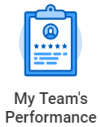
6. Input the edits.

7. Click **Submit.**

8. To discontinue a goal, click the **Status** dropdown and select **No Longer Needed**. The goal will remain on the employee's goal list, but the goal will not appear on the year-end performance evaluation.

View Team's Goals (Reports)

Managers can view all the goals for their direct reports vs. view goals of individuals.



1. From the Workday home page, click on the **My Team's Performance** app.
2. Scroll past the Performance Appraisal report to the **My Direct Report's Goals**.
3. Click the gear to export to Excel or click View More to fill the screen. Click either the Employee ID, Worker or Position column header to filter the report directly in Workday. Filter will not hold if exporting to Excel.
4. Add a comment to an employee's goal by clicking the Activity icon . The comment will be visible to the manager and the employee. Once posted, the activity icon will change to a comment icon for both the manager and employee.

ALTERNATIVE REPORTS: Type these titles in the Workday search.

- My Team's Goals
- My Direct Report's Goals

Talent Management: Goals for Managers

Performance Timeline

Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | June | July | Aug | Sept

Manager cascades goals
10/14 – 11/8

HR launches goal templates
11/11

Team member goal writing deadline
12/13

HR launches dual / secondary position goal template
12/15

Manager approves goals by
12/13

Dual / Secondary goal writing deadline
1/31

Manager approves primary role goals by
1/31

HR launches self-evaluations
6/1

Self-evaluations due
7/19

Appraisals, conversations and acknowledgements due for managers
8/31

HR Task

MGR Task

Emp Task