SETTING GOALS

Use this job aid to enter goals in Workday. Setting goals is done during the goal cascade/alignment phase of the performance management process.

To learn more, find job aids and videos at http://workday.trinity-health.org.

For additional assistance, contact your Tier 1 resource, as noted on the Workday Help website.

Trinity Health Performance Management Process

- Goal cascade/alignment: July 1 – Aug. 31
- Check-in: Nov. 1 – Dec. 15
- Mid-Year Review: Jan. 1 – Feb. 28
- Check-in: March 1 – April 15
- Self-Evaluation: May 15 – June 15
- Annual Performance Review: June 18 – Aug. 31

Engaged high performing colleagues
Performance: Setting Goals

Business Process Steps and Roles

Process roles are designated by “security role,” which do not reflect actual job titles. People may have multiple roles.

Setting a Goal

As a colleague, you are responsible for putting your goals in Workday. Your manager may also cascade goals to you.

Meet with your manager to determine if she/he will cascade goals to you; also discuss the amount of goals you should enter and the weight of each one. Your goals must total a weight of 100% and align with the People-Centered 2020 Strategic Plan.

Core Values are incorporated in our performance expectations (Reverence, Commitment to Those Who Are Poor, Justice, Stewardship, Integrity). Your performance will be rated according to how well you exhibit these as part of achieving your goals.

- Initial goal(s) discussion: Colleague and Manager
- Cascade goal(s): Manager
- Enter goals: Colleague

NOTE:
Managers may or may not have goals to cascade to their direct reports. The goal setting process can begin with you (the colleague) entering goals.
1. Log in to Workday
2. Click the **Performance** worklet
3. Click **Goals** from the View column
4. Click **Edit**

5. Click **Add**

6. Type your **SMART Goal** (to reflect an area of the People-Centered 2020 Strategic Plan)

7. Select only one People-Centered 2020 **Category** that best aligns with your SMART goal

8. Select a **Status** (Completed, In Progress, Not Started, Not Applicable)
9. Type the **Weight** of the goal

10. Select a **Due Date** (this is required; Workday will not calculate goals correctly if this is skipped)

11. Click the **add icon (+)** to add milestones that apply to the goal (you may not have a milestone to add until you have achieved a task related to your goal)

12. Click **Done** when complete or click **Do Another** to add another goal

**NOTE:** The weighting of all goals must equal 100 or you will not be able to submit your Goals (for example, if you have three goals, one could equal 20%, one could equal 40%, and one could equal 40%).
End of Process: Next Steps

WHEN YOU HAVE ENTERED YOUR GOALS:

- Manager will review or edit the goal(s).

SMART Goals

Example: Reduce hospital acquired infections by increasing handwashing from 75% to 98% by June 30th.

- **S** Specific: Be clear about what is to be done.
- **M** Measurable: How will you prove or demonstrate the goal?
- **A** Attainable: Is it realistic and within reach?
- **R** Relevant: Is it within the scope and aligned to an organizational goal?
- **T** Time Bound: Do we know when it must be done?