Goals

(Company and Personal)

What are Goals

Allowing everyone to perform to the best of their abilities in any organisation is a constant challenge that requires a range of performance management tools. Setting clear goals for individuals, teams and the organisation helps to drive an organisation towards success.

As deadlines approach and the day to day work occupies people's focus it can be easy to lose track of whether individual and team goals are being met. Fortunately, in Totara Learn you'll be able to create goal frameworks, set up performance scales and create goal-based reports to ensure everyone is reaching their goals or being provided with support when required.

Setting and Measuring Meaningful Goals

Setting clear and achievable goals is one of the critical first steps in performance management. For any organisation to succeed, focused outcomes that direct employees' attention and effort are an essential piece of a broader performance management strategy.

Goals that affect large teams and departments are an essential feature of managing an organisation's aims, however, the smaller, personal targets that make up broader goals are also essential. That's why Totara Learn allows users to create both **company** and **personal** goals in hierarchical goal frameworks.

Performance Management

Managing clear outcomes for your organisation is just one of the important steps of performance management. Apart from **goals** there are other areas to consider when focusing on **performance management** in Totara Learn:

Appraisals

Setting clear goals at the start of the year can help when it comes to **appraising** how successful the year was and to reflect on what the next goals should be for both individuals and the organisation as a whole. Totara Learn provides a space to facilitate discussions between users and their appraisers to help clarify successes and challenges throughout the year.

An appraisal form builder is built into Totara Learn and allows Site Administrators to create custom appraisal forms which can be assigned to individuals and groups of users within your organisation.

360 feedback

Whilst goals allow individuals to clarify targeted outcomes and move towards them, 360 feedback allows an individual to receive feedback from a group of peers on how well they performed when attempting to reach those goals.

A traditional approach to an appraisal might involve only a team member and their manager. Incorporating 360 feedback allows for individuals to have a richer set of feedback from a broader range of perspectives allowing individuals to develop faster.
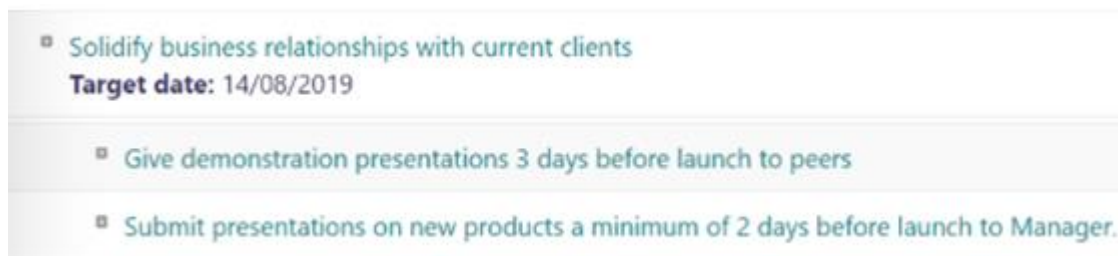
Goal Frameworks

In Totara Learn you're able to put together **goal frameworks** that hold the skills, knowledge, and behavioural goals you expect staff to achieve. This goal framework is an example of what you can create in Totara Learn

Adding Goals

When creating a new goal framework or editing an existing framework you're able to add new goals one by one or add several goals at once by clicking on bulk actions and then add.

Parent and Child Relationships

Some goals may be too large to be achieved in one simple action. That's why Totara's goal frameworks allow you to create parent and child relationships so that harder to meet objectives can be broken down into smaller, manageable targets.
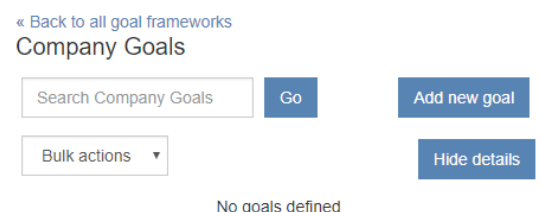

When adding a new goal, you can define whether that goal belongs below another goal in the framework.

You'll need at least one item in the framework to be able to start defining parent / child relationships. If you do not have any goals in the framework then the option will not appear.
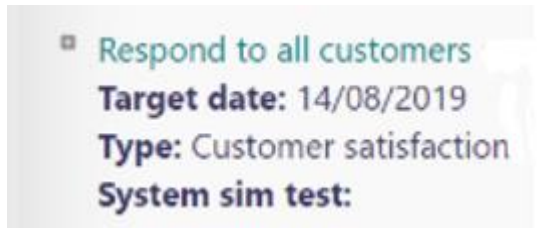
Types

As employees may have many goals they need to achieve throughout the year, goals can be organised into **types**.

Aside from allowing you to further organise and categorise goals, goal types allow you to add **custom fields** which means additional data can be added to goals such as a location field. This can be useful when generating reports if you need more information about a goal.

Each goal in a framework can have a different type, however, if you'd like all goals to have the same type you can **bulk re-classify** goals to be the same type when managing company or personal goal types.

Target Dates

Whilst knowing what to do is an essential aspect of managing goals, knowing when to do something is also vital for employees to manage their priorities and ensure tasks are completed on time.

When creating a goal framework, you're able to set the target date by which users should complete a goal.

Goal Types

Company vs Personal Goals

Goals can be categorised into types which can be either personal, or company goal types. Learners can view their goal page with both company and personal goal types on.

Company Goals

Company goals represent the aims of the organisation and can be assigned to many users. They can be structured as one or more hierarchical trees, allowing for more complex targets to be broken down into smaller manageable stepping stones for users across the organisation.

By changing the user permission setting, site administrators can define whether team members can change their progress scales or whether this is something only a manager can do.

Personal Goals

Personal goals are more targeted, specific goals for individual users to achieve. Participative goal settings allow users to take control of their own work and manage their own expectations and performance. Users can easily add and adapt their personal goals and monitor their own progress as they achieve.

Goal Scales

Each goal framework will be attached to a goal scale which allows Site Administrators to define the criteria by which a goal can be measured.

Defining a Scale

Goal scales can be **customised** to include as many levels of achievement as is required. Site Administrators can set the default value for the scale so that this level will automatically appear on a user's goal page.

Name	Default value ℹ
Goal Completed	○
Goal In Progress	○
Goal Assigned	⦿

A goal is considered complete if the scale value set has **considered complete** set to yes. Site Administrators are also able to change as many values to be considered complete as required. To change the value to complete select the cog in the edit column.

Changing the goal status

Depending on the capability settings that have been set up in your system, users will be able to change the status on the goal on their goal's page using the dropdown menu. Once users begin

Name	Default value ℹ
Goal Completed	○
Goal In Progress	○
Goal Assigned	⦿

working on a goal or complete a goal, the status can be changed to reflect a user's progress.

As a Site Administrator, you're able to change users' permissions to prevent users from changing the status of goals if your organisation only requires managers to be able to do this.

Reporting on Goals

Once you've created some goal frameworks, attached some detailed scales and assigned goals to users you'll need to know how those individuals and teams are progressing with their objectives.

Summary reports allow you to have an overview as to where everyone is with their goals and decide whether some users require more targeted training or support to reach their goals.

You're also able to use the custom report builder to gain more specific data on users' progress and decide whether any actions need to be taken to ensure everyone is comfortably meeting their goals for the year.

Additional Links

This video will demonstrate 'Adding Goals'

https://youtu.be/eACUkQ-6vs8

This video will demonstrate 'Goal types and permissions'

https://youtu.be/E1SxaMTfcMs

This video will demonstrate 'Reporting on Goals'

https://youtu.be/NDzunYLCFek