Conducting a Goal Setting Discussion

Information, Exercises and Resources

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Conducting a Goal Setting Discussion

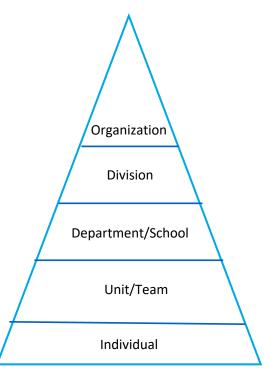> **Review Organizational Goals to Prepare for the Discussion**

Before speaking with employees, supervisors should review the organization's top-level goals and how your own goals contribute to achieving the organizational goals . In addition, identify the goals that need to be delegated to the team, and provide direct reports with the information required to draft their goals.

You should advise your reports to complete the following steps to create a draft of their performance goals, strategies, and tactics before the goal-setting discussion.

Individual Development Plan

Comments

Actions

✓ Re-read the mission and vision for the organization; understand the organization's strategic objectives and how their job supports them

✓ Re-read the department or school's mission and vision

✓ Review their job description and any performance expectations for their role

✓ Identify resources to complete goals: websites, colleagues, required trainings

✓ Review any development areas from recent performance reviews

✓ Review their current goals and aspirations

✓ Identify any new overarching goals

✓ Identify SMART goals

✓ Identify resources to complete goals

> **The Importance of Conducting Goal Setting**

Supervisors and their direct reports need to collaborate in setting meaningful goals, tracking progress against those goals over time, and evaluating performance.

For the organization, goal-driven performance management aligns employees within an organization around achieving the strategic goals

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> **Ensure Meaningful Goals Organization**

You should work with your direct reports to check the accuracy of the goals and assess the alignment of goals with the university mission and departments/school objectives. In addition, you should ensure that the goals support the employees' development goals based on any recent performance feedback.
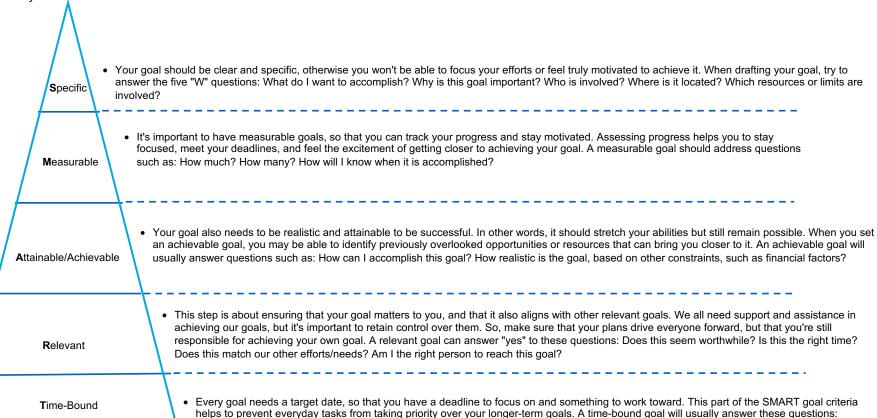
Organization

Division

Department/School

Unit/Team

Individual

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Set SMART Goals for your Direct Report

Utilize the concept of SMART goals in the goal setting process; this method ensures that the employee and manager both understand the goal by creating a goal that is specific, measurable, attainable, relevant, and timely.

Specific

- Your goal should be clear and specific, otherwise you won't be able to focus your efforts or feel truly motivated to achieve it. When drafting your goal, try to answer the five "W" questions: What do I want to accomplish? Why is this goal important? Who is involved? Where is it located? Which resources or limits are involved?

Measurable

- It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines, and feel the excitement of getting closer to achieving your goal. A measurable goal should address questions such as: How much? How many? How will I know when it is accomplished?

Attainable/Achievable

- Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it. An achievable goal will usually answer questions such as: How can I accomplish this goal? How realistic is the goal, based on other constraints, such as financial factors?

Relevant

- This step is about ensuring that your goal matters to you, and that it also aligns with other relevant goals. We all need support and assistance in achieving our goals, but it's important to retain control over them. So, make sure that your plans drive everyone forward, but that you're still responsible for achieving your own goal. A relevant goal can answer "yes" to these questions: Does this seem worthwhile? Is this the right time? Does this match our other efforts/needs? Am I the right person to reach this goal?

Time-Bound

- Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals. A time-bound goal will usually answer these questions: When? What can I do six months from now? What can I do six weeks from now? What can I do today?.

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	SMART Goals Example					
	Goal	**Specific** Your goal should be clear and specific, otherwise you won't be able to focus your efforts or feel truly motivated to achieve it. When drafting your goal, try to answer the five "W" questions: • What do I want to accomplish? • Why is this goal important? • Who is involved? • Where is it located? • Which resources or limits are involved?	**Measurable** It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines, and feel the excitement of getting closer to achieving your goal. A measurable goal should address questions such as: • How much? • How many? • How will I know when it is accomplished?	**Achievable** Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it. An achievable goal will usually answer questions such as: • How can I accomplish this goal? • How realistic is the goal, based on other constraints, such as financial factors?	**Relevant** This step is about ensuring that your goal matters to you, and that it also aligns with other relevant goals. We all need support and assistance in achieving our goals, but it's important to retain control over them. So, make sure that your plans drive everyone forward, but that you're still responsible for achieving your own goal. A relevant goal can answer "yes" to these questions: • Does this seem worthwhile? • Is this the right time? • Does this match our other efforts/needs? • Am I the right person to reach this goal?	**Time-bound** Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals. A time-bound goal will usually answer these questions: • When? • What can I do six months from now? • What can I do six weeks from now? • What can I do today?
Organization Goal	Engage exceptional Staff					
Division Goal	Provide high-quality and cost-effective administrative and business services to the campus; Create a vibrant, sustainable and safe environment for living, learning and working.					
Department/School Goal	Optimize the performance of our people to deliver the University's mission.					
Unit/Team Goal	Construct a living, working and learning innovation hub; Engage with and develop entrepreneurial in spirit staff members at UC Merced.					
Individual Goal	Lead discussions to help my staff understand organizational goals, and how our work contributes to reaching those goals. Provide direction and resources for professional development. Employees will be able to write SMART goals.	Create open communication pathways with my staff; Learn coaching skills; Learn group facilitation skills; Learn SMART goals method	85% of my direct reports will write SMART goals for the AY 2018-19 performance appraisal cycle, with minimal guidance; My direct reports will come to me when they have a problem or need guidance.	Prioritize SMART goals discussions during weekly employee one-on-ones; Schedule bi-weekly team discussions; Take a coaching course; Take a group facilitation course; Take a SMART goals method course	Providing information on how our team's work aligns with the organization's goals will increase the efficiency and effectiveness of our team and our department/school. My team's ability to write SMART goals demonstrates our understanding and support of the mission of the university.	All one-on-one's and team discussions will be scheduled for the AY 2018-19 by the end of April; Funding request for coaching, SMART goals, and group facilitation courses will be submitted by May 2018. Staff annual performance appraisals will include SMART goals for the AY 2018-19.

SMART Goal: Coach and support my direct reports, resulting in 85% of all performance plans for the AY 2018-19 written with SMART goals.

SMART Goals Template						
	Goal	Specific Your goal should be clear and specific, otherwise you won't be able to focus your efforts or feel truly motivated to achieve it. When drafting your goal, try to answer the five "W" questions: • What do I want to accomplish? • Why is this goal important? • Who is involved? • Where is it located? • Which resources or limits are involved?	Measurable It's important to have measurable goals, so that you can track your progress and stay motivated. Assessing progress helps you to stay focused, meet your deadlines, and feel the excitement of getting closer to achieving your goal. A measurable goal should address questions such as: • How much? • How many? • How will I know when it is accomplished?	Achievable Your goal also needs to be realistic and attainable to be successful. In other words, it should stretch your abilities but still remain possible. When you set an achievable goal, you may be able to identify previously overlooked opportunities or resources that can bring you closer to it. An achievable goal will usually answer questions such as: • How can I accomplish this goal? • How realistic is the goal, based on other constraints, such as financial factors?	Relevant This step is about ensuring that your goal matters to you, and that it also aligns with other relevant goals. We all need support and assistance in achieving our goals, but it's important to retain control over them. So, make sure that your plans drive everyone forward, but that you're still responsible for achieving your own goal. A relevant goal can answer "yes" to these questions: • Does this seem worthwhile? • Is this the right time? • Does this match our other efforts/needs? • Am I the right person to reach this goal?	Time-bound Every goal needs a target date, so that you have a deadline to focus on and something to work toward. This part of the SMART goal criteria helps to prevent everyday tasks from taking priority over your longer-term goals. A time-bound goal will usually answer these questions: • When? • What can I do six months from now? • What can I do six weeks from now? • What can I do today?
Organization Goal						
Division Goal						
Department/School Goal						
Unit/Team Goal						
Individual Goal						
SMART Goal:						

S.M.A.R.T. Objectives – Example 1

Objective: Produce Monthly Reports

Specific: Administrative Assistant will produce Reports A, B, and C.

Measurable: Reports A, B, and C will be formatted according to guidelines and contain zero errors.

Achievable: Yes, reports are standard and not complex, 100% accuracy is possible.

Realistic/Relevant: Yes, this goal applies to the Administrative Assistant job description.

Time-Bound: Reports will be produced by the 5th of each month.

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S.M.A.R.T. Objectives – Example 2
Objective: Maintain Calendaring

Specific: Administrative Assistant will schedule meetings on same day of request and provide written schedule on Manager's Desk for next day by 5:00 p.m.

Measurable: Administrative Assistant will keep a spreadsheet of meeting request, time requested, and time scheduled to track turn around time. 100% success rate expected.

Achievable: No way. Anyone whose ever tried to schedule meetings knows that getting all relevant parties available at the Same time is like herding cats. To require an Administrative Assistant to get all meetings scheduled on the same day as requested would lead to guaranteed failure. Revise success rate to 75% and then you have an achievable, yet still difficult, goal.

Realistic/Relevant: Yes. This is an essential function and something the Administrative Assistant should have control over.

Time-Bound: Written schedule provided to Manager by 5:00pm each day.

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S.M.A.R.T. Objectives – Practice 1

Objective: Send out welcome letters to our new students.

Job: Administrative Assistant
Assigned: 10/17/19
Due: 11/26/19

1. Specific
2. Measurable
3. Achievable
4. Relevant
5. Time-Bound

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S.M.A.R.T. Objectives – Practice Answer 1

S.M.A.R.T. Objective: Produce and distribute personalized welcome letters, error free, to all new students in our department by 11/26/19 .	
Specific	Produce and distribute personalized welcome letters to new students.
Measurable	Distribute letters, error free, by 10/26/19.
Achievable	Yes. Task matches individuals skills and job responsibilities. Has performed similar tasks.
Relevant	Yes. This is a key responsibility for the Administrative Assistant job series.
Time-bound	Yes – Simple task, not labor intensive.

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S.M.A.R.T. Objectives – Exercise 2

Keep our department's Website up-to-date.

Job: IT Programmer
Assigned: 7/1/19
Due: First Friday of Every Month

1. Specific
2. Measurable
3. Achievable
4. Realistic/Relevant
5. Time-Bound

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S.M.A.R.T. Objectives – Practice Answer 2

S.M.A.R.T. Objective: Solicit updates and new material for the Website from our department managers on the first Friday of each month; publish this new material by the following Friday. Each time material is published, review the Website for material that is out-of-date and delete or archive that material."	
Specific	Solicit updates and new material for the Website from our department managers. Review website for material that is out-of-date and delete or archive that material.
Measurable	Completed by the first Friday of each month.
Achievable	Yes. Individual has resources, skills, and knowledge to execute this task.
Realistic/Relevant	Yes. It's a key responsibility of the IT Programmer classification.
Time-bound	Completed by the first Friday of each month.

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