

# Setting Annual Goals

*May 1 – Sept. 1*

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# Mid Year Review

*Jan. 1 – Feb. 15*

## Setting Annual Goals

Administrative staff are required to establish annual goals. Generally, goals should be established sometime between May 1 and Sept. 1 of each year. Each supervisor should meet individually with his or her administrative reports to establish annual performance goals together.

The goals should be documented on the Annual Goals form and become a record of agreement between the supervisor and staff member. Establishing a few goals works better than many goals. This form does not need to be submitted to Human Resources.

<i>Staff Member Responsibilities</i>	<i>Supervisor Responsibilities</i>
<ul style="list-style-type: none"> <li>• Develop 1-3 goals for you and/or your area of accountability to achieve.</li> <li>• Meet with your supervisor to discuss the action steps needed to successfully achieve each objective.</li> <li>• Identify the resources necessary to achieve the objective; make sure that major constraints and risk factors have been adequately anticipated and addressed.</li> <li>• Determine the participation or input required from other individuals or departments in order to achieve goals.</li> <li>• Ensure that the performance objective statements meet the SMART test (see pg. 7).</li> <li>• Document the agreed upon goals on the goal-setting form.</li> </ul>	<ul style="list-style-type: none"> <li>• Keep individuals and teams abreast of information regarding Wittenberg's evolving strategic plan and annual goals.</li> <li>• Review draft performance goals and ensure key issues are included.</li> <li>• Propose goals for staff when their drafts do not address key issues.</li> <li>• Help staff think through their career goals and aspirations.</li> <li>• Assist staff in determining their development needs.</li> <li>• Create an environment that promotes open discussion and continuous learning.</li> </ul>

Staff members should strive to make each performance goal “S.M.A.R.T.”

**Specific** – In concrete terms, identify exactly what is to be achieved. The goal should specify the what, why, and how of what is to be achieved.

**Measurable** – Use precise quantitative or qualitative measures to define results. Goals should be able to be measured, observed and/or monitored. The objective statement should sufficiently define the targeted results so that those in charge of assessing performance can determine if the results were achieved.

**Achievable** – Challenging but achievable. While goals should represent an ambitious performance level, the results must also be reasonably attainable.

**Relevant** –Goals should reflect the priorities of the university and/or department.

**Timely** – Identify clear deadlines and checkpoints. The goal should normally be accomplished within a one-year time frame. When the goal stretches beyond a year, year-end milestones should be identified.

## **The Goal-Setting Meeting**

1. **Schedule the meeting and set an open tone.** Make sure you have set aside an uninterrupted block of time for your discussion. Set a tone that indicates you want to work *with* the staff member to ensure that appropriate goals are developed.
2. **Carefully listen to the staff member’s draft goals.** Pay attention to the facts as well as the train of thought. Reserve your comments and thoughts until the person has completed a point.
3. **Provide feedback on the staff member’s ideas.** Your focus will be on listening, questioning, and providing feedback. This does not mean that you must agree with each proposed goal. You should encourage and reinforce the workable ideas, as well as guide them back on the right track if their draft goals do not meet departmental priorities.

- 4. Determine and agree on the action steps to be taken.** Once the specific goals have been determined, summarize what was discussed. The goal of coaching is to help people think and act independently – not to help them “find the one right way to go about achieving a goal.” Encourage staff as much as possible to brainstorm and explore various options and offer information when needed.

## **Mid-Year Review**

Supervisors are expected to meet individually with their administrative staff members to review and document the staff members progress toward accomplishing the agreed upon goals. This is also an opportunity to review the goals and make necessary changes. It is not unusual for unexpected priorities, activities or significant changes to arise that affect the staff members’ ability to complete the goal.

This meeting should generally take place sometime between Jan. 1 and Feb. 15 of each year. While it is strongly advisable to make notes from the meeting and document changes, a form does not need to be completed.