UNT PeopleAdmin Performance Management

Goal Setting for the Staff Review Cycle
When are Goals Utilized in the Staff Performance Review Cycle?

• Supervisor Evaluation step (April through May)
  • Goals from the prior year are evaluated and comments on goal achievement are entered
  • Goals for the upcoming year are established through conversation between the supervisor and employee

• Employee Acknowledgement of Evaluation step (completed by end of May)
  • Goals are acknowledged by the employee

• Goals may be reviewed or adjusted during the review cycle as needed
  • Open for edit/review during “Supervisor Reviews/Completes Plan” step
  • HR Compensation can reopen goals for adjustment during the year if needed
Why Set Goals?

• Setting goals and priorities builds the foundation for successful performance for your employees. It should be a collaborative process between you and your employee.

• Evaluation of goals make up 50% of the overall performance evaluation score for staff employees. The remainder of the score is based on evaluation of job duties.

• Setting and managing goals can be challenging! To facilitate successful goal setting and achievement:
  • Utilize SMART goal method for developing goals (method explained on slides 4-15)
  • Align goals with the organization, department or team goals
  • Break goals/objectives into identifiable key results that can be attained over the course of the review period
  • Check in with employee on a regularly scheduled basis on goal progress
  • Revisit goals to ensure they continue to be the “right” goals
Goal Setting
The S.M.A.R.T Approach

Specific | Measurable | Attainable | Relevant | Time Bound
---|---|---|---|---
Target | Ruler | Flag | Links | Sand Timer
What are S.M.A.R.T goals?

- Goals designed in a way to foster clear and mutual understanding of what constitutes expected levels of performance and successful professional development
- May include both Performance Goals and Development Goals

**Performance Goals are:**
- Appropriate to the level of the position
- Related to job responsibilities and deliverables
- Aligned to higher level goals

**Development Goals are:**
- Learning-oriented
- Support higher level performance in the employee’s current job and career advancement
S.M.A.R.T Goals

Specific – Goals that are well defined and clear on what needs to be accomplished.

What will be achieved? What actions will the employee need to take?

“S” actions may include:

<table>
<thead>
<tr>
<th>Oversee</th>
<th>Update</th>
<th>Write</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coordinate</td>
<td>Upgrade</td>
<td>Process</td>
</tr>
<tr>
<td>Supervise</td>
<td>Develop</td>
<td>Provide</td>
</tr>
<tr>
<td>Manage</td>
<td>Create</td>
<td>Maintain</td>
</tr>
<tr>
<td>Plan</td>
<td>Implement</td>
<td>Reconcile</td>
</tr>
<tr>
<td>Support</td>
<td>Evaluate</td>
<td>Direct</td>
</tr>
<tr>
<td>Transition</td>
<td>Produce</td>
<td>Administer</td>
</tr>
</tbody>
</table>
S.M.A.R.T Goals

**Measurable** - Enables you to evaluate whether the goal was achieved or not.

*What data will measure the goal – How much? How many? How well?*

Some typical data types and data collection methods may include:

<table>
<thead>
<tr>
<th>DATA TYPES</th>
<th>DATA COLLECTION METHODS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Quality/accuracy rates</td>
<td>Automated reports</td>
</tr>
<tr>
<td>Amounts produced</td>
<td>Audits, tests</td>
</tr>
<tr>
<td>Revenue generated</td>
<td>Surveys</td>
</tr>
<tr>
<td>Productivity rates</td>
<td>Work products, samples</td>
</tr>
<tr>
<td>Customer Satisfaction</td>
<td>Other documents</td>
</tr>
</tbody>
</table>
S.M.A.R.T Goals

**Attainable** – Realistic about what is possible given the availability of resources, knowledge and time.

*Is the goal doable? Does the employee have the necessary skills and resources?*
S.M.A.R.T Goals

Relevant – Goals that are important and will make a material impact on achieving larger objectives.

*How does the goal align with broader goals? Why is the result important?*
S.M.A.R.T Goals

Time-Bound – Goals with a specific timeframe that specify when they will be completed by.

What is the time frame for accomplishing the goal? Have realistic deadlines been set?
S.M.A.R.T Goals

SMART Goal Formula:

Goal Statement: What Makes It SMART:

Do ____________ Specific action taken

in order to ______________ to accomplish Measurable, Relevant result

by ____________ within certain Time-Bound time frame

And make sure it’s Attainable (realistic time frame, sufficient resources, feasible target!)
Building S.M.A.R.T Goals

S: Provide more growth and learning opportunities to each member of my team

M: Give feedback to each member at least 2 times per month

A: Feedback should come from manager

R: Improves team communication and feedback culture

T: Provided before the end of the next quarter

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S: Begin new social media campaign

M: Generate 75 new content downloads

A: Marketing team responsible for running campaign and measuring performance

R: Promote our new feature

T: In the next two months
S.M.A.R.T Goals Example
Employee Performance Focus

• Provide high-quality customer service resulting in a 90% customer satisfaction rating from external customers on accuracy, timeliness and courtesy measures quarterly.

• Reconcile the department financial reports by the 15th of every month with no increase in reconciliation errors.

• Complete daily responsibilities resulting in the achievement of 85% of the program and individual performance targets by the end of the performance year.

• Manage the department budget to stay within spending guidelines by the end of the fiscal year.

• Coach and support direct reports resulting in the attainment of 85% of all performance plan goals, setting clear expectations, giving meaningful feedback and providing fair performance evaluations throughout the performance period.
S.M.A.R.T Goals Examples
Employee Development Focus

• By the end of December, develop and apply enhanced computer skills to create more detailed, accurate budget reconciliation reports each month.

• By the end of April, complete the required coursework and attain the agreed-upon project management credential to support all assigned initiatives.
SMART Goals

**DO’S & DONT’S**

- **Do**: Be specific in your goal setting
  - Include your team members in company goals
  - Set stretch-goals that challenge team limitations
  - Select relevant goals that relate to your strategic planning
  - Set a timeframe to your goals (regardless of what it is)
  - Be flexible and prepared to adjust goals when necessary

- **Don’t**: Allow vague goal setting habits
  - Make team or company-wide goals in silos
  - Set unachievable goals that will lead to team frustration
  - Chase attractive or irrelevant goals that may distract the organization
  - Expect perfection
  - Lose sight of the big picture when establishing project goals
Accessing the Performance System and Additional Resources

- Via employee portal link: https://my.untsystem.edu
  - Employee Self Service page
  - Select the tile for Staff Performance Evaluations
- Log-in with EUID and Password
- All supervisors and employees can access system
- For additional resources on the performance management system go to: https://hr.untsystem.edu/supervisor-resources/performance-management.php
Contacts and Resources

• HR Compensation and Performance Management Team
  • System issues: log-in, employees not listed, navigation issues, re-open a task
  • Email: aidee.vaidya@untsystem.edu or jayne.colavecchia@untsystem.edu
  • Phone: 940-369-6341 or 940-369-6361

• UNT Campus HR Team
  • Performance management concerns, discussion about unsatisfactory ratings
  • Email: HRAdministration@untsystem.edu
  • Phone: 940-565-2281

• Performance Management Web Page https://hr.untsystem.edu/performance-management