Guidelines – Step I & 2: The Plan
(see Screenshot Guide for detailed system instructions)

1. ► PURPOSE:
   - Review the Employee Position Description
   - Review Evaluation Values and Characteristics
   - Discuss and Input the Year’s Goals (which will populate into the year-end Evaluation)

2. ► S.M.A.R.T. GOALS

   OVERVIEW

S.M.A.R.T goals ensure that employee goals are meaningful and measurable. Goals are critical for ensuring good communication between employees and supervisors so there are no surprises during annual performance evaluations. Goals should be:

1. Specific
   - Goals should be simplistically written and clearly define what is going to be done.

2. Measurable
   - Goals should be measurable so that there is tangible evidence of accomplishment. Establish concrete criteria for measuring progress toward the attainment of each goal. Generally there is a measure for the goal, but there may be shorter-term or smaller measurements built-in.

3. Achievable
   - Goals should be achievable. Ask, “With a reasonable amount of effort and application can the objective be achieved?” A goal can be both high and achievable. (achievable motivates; impossible de-motivates!)
4. **Relevant/Results-Focused**
   - Goals should measure outcomes, not activities and be relevant to the needs of the individual/department/division or institution.

5. **Time Based**
   - Goals should include, where possible, projected time-lines, dates of achievement and accomplishment.

3. **S.M.A.R.T. Goal Examples**

<table>
<thead>
<tr>
<th>GOAL</th>
<th>SPECIFIC</th>
<th>MEASURABLE</th>
<th>ACHIEVABLE</th>
<th>RELEVANT/ RESULTS FOCUSED</th>
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</table>
| **Service Training**  
Conduct service training for at least 100 staff by January 1, 2015, with 90% of attendees indicating that they will incorporate at least one principle learned in the training into their daily work at the College. | Who: staff  
What: Service Training | How Many: 100 Staff  
By: Jan. 1 | 90% (not 100%)  
One principal (not 10 principals)  
By Jan 1 (not in one month) | 90% incorporate on principal |
| **Receipt Reconciliation**  
On a monthly basis, obtain 100% of the receipt documentation from college purchasing card holders within the department and match the receipts to the cardholder statements within three days of receiving the statement. After matching, attach the receipt to the statement and maintain, organized by month, in office files for potential audit review. | Who: purchasing card holders  
What: match, receipts attach statement and file | How Often: monthly receipt  
Within: 3 days | This is an operational task and may become a job duty, but is a goal when it is new or it may be a goal because it is a job duty that is a performance issue that needs to be addressed. If it is a performance issue, you may also need to address training, supervisor assistance, etc. | Organized for potential audit |
| **Banner Training**  
Train new staff in the use of Banner student system. Ensure that each staff member | Who: all new staff  
What: Banner Student | What: input for 15 students without error  
Within: 2 months of onboarding | They may only have 2 or three new employees during the year requiring minimal training time...a tutorial is available so | Banner Student needs to be accurate |
Completes Banner input for at least 15 students, without error, by the time they have completed their 2 month onboarding.

<table>
<thead>
<tr>
<th>Customer Complaints</th>
<th>What: compile a list</th>
<th>What: 1) meet with all stakeholder departments 2) compile a list</th>
<th>No (or minimal) customer issues/complains</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>By: July 1</td>
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<tr>
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<td>There is an appropriate amount of time to meet with departments and compile the list</td>
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<tr>
<td>Ensure all telephone calls are handled in a polite and engaging manner and directed to the appropriate person. By July 1, 2014, meet with each department to compile a thorough list of possible customer issues. Share and utilize the list as appropriate to ensure complaints or issues with service.</td>
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</tbody>
</table>

4. **OTHER RESOURCES**

   [http://www.youtube.com/watch?v=Uy6qGhki-K4](http://www.youtube.com/watch?v=Uy6qGhki-K4)
   
   [http://www.youtube.com/watch?v=vKMWrWojUOZQ](http://www.youtube.com/watch?v=vKMWrWojUOZQ)
   
   [http://www.slideshare.net/amirsaitaz/goals-setting](http://www.slideshare.net/amirsaitaz/goals-setting)