

Guidelines – Step 1 & 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)

TABLE OF CONTENTS

Purpose of Plan.....	1
S.M.A.R.T Goals Overview.....	2
Examples of S.M.A.R.T. Goals.....	3
Other Resources.....	4

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

GOAL	SPECIFIC	MEASURABLE	ACHIEVABLE	RELEVANT/ RESULTS FOCUSED
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.			it will be scheduling, answering questions and monitoring	
Customer Complaints 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.	What: compile a list	What: 1) meet with all stakeholder departments 2) compile a list By: July 1	There is an appropriate amount of time to meet with departments and compile the list	No (or minimal) customer issues/complains

4. ► OTHER RESOURCES

<http://www.youtube.com/watch?v=Uy6qGhki-K4>

<http://www.youtube.com/watch?v=vKMrWsjUOZQ>

<http://www.slideshare.net/amirsaiftaz/goals-setting>