Performance Management: Planning & Goal Setting

HSPH Kresge Building
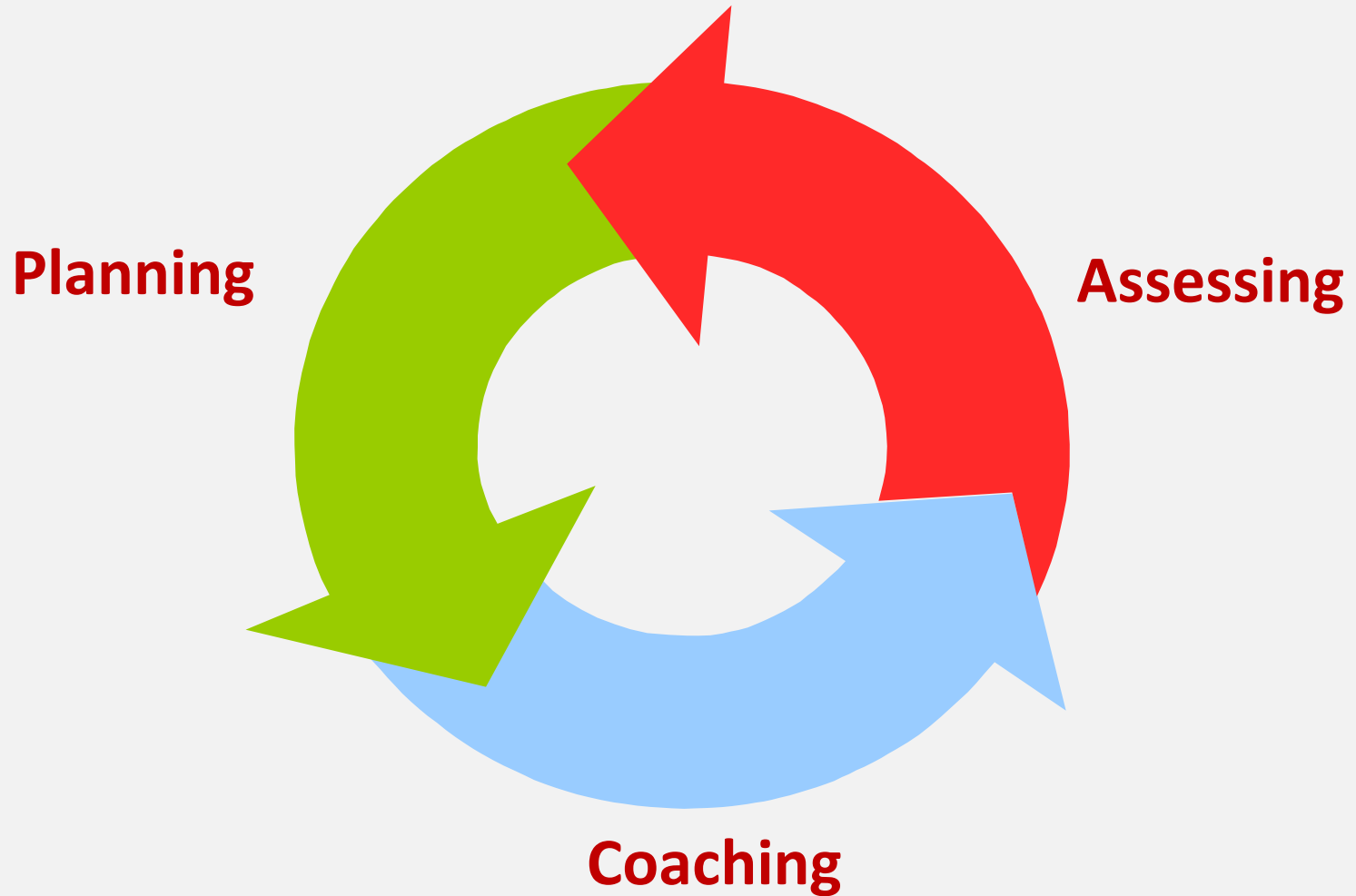
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Office of Employee Development and Wellness

What We'll Cover Today

— The HLC performance management cycle

— The benefits of setting goals for individuals and teams

— The key elements of strong and effective goals

— Tools and resources to support you in goal development

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HLC Performance Management Cycle

Planning

Assessing

Coaching

HLC Performance Management Cycle

Planning

Timeline: Summer/Fall

HR
- HR sends kick-off message to HLC

Employee
- Plan and develop draft goals for the FY ahead
- Review/revise/finalize goals with Manager

Manager
- As applicable, link individual goals to those of team/dept./org.

Coaching

Timeline: Ongoing

Overview
- Practical Feedback (formal and informal)
- Course correct and continue

Assessing

Timeline: Spring

Employee
- Complete self-evaluation
- Identify other reviewers for feedback

Manager
- Send 360 feedback forms out to others
- Complete overall assessment
- Discuss with employee and finalize review
- Convey final rating and pay impact
- Mark document complete in the system

Goal Setting

A process of defining targets that creates value for yourself, your unit and your organization.

When all three sets of goals are aligned, organizations achieve far greater levels of leadership, innovation, or profitability.

Benefits of Goal Setting

Foster Growth Mindset

Identify resources + collaboration needed

Motivate behavior change

Provide direction and sense of purpose

Clarify how work is accomplished

Foster alignment within groups

Accountability for specific outcomes

Foster a culture of achievement

Types of Goals

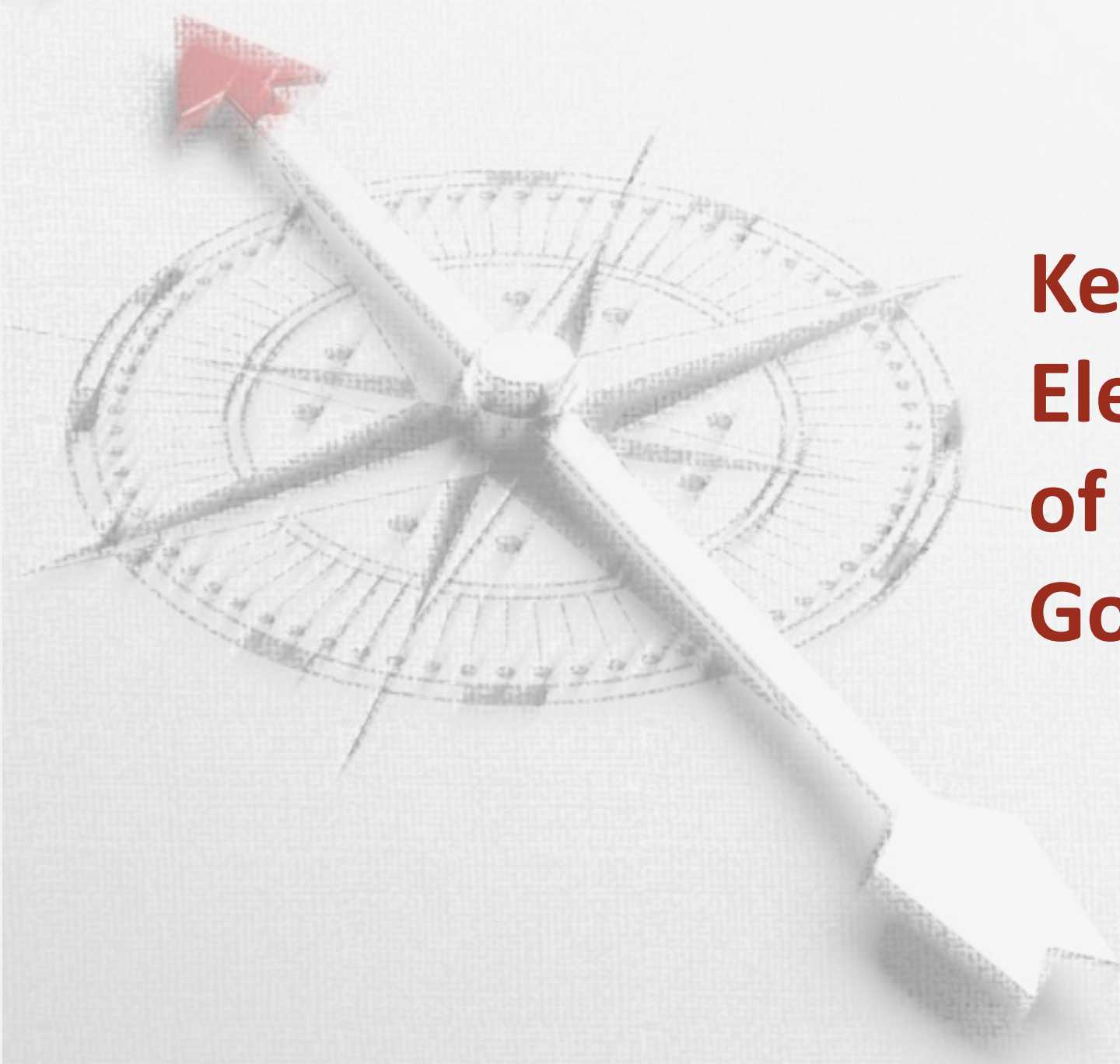| Job Performance Goals	Professional Development Goals
Focus on <u>what</u> needs to be accomplished during the year to achieve unit goals. Includes *specific tasks, projects and/or outcomes*.	Focus on <u>how</u> the work will get done; acquiring *skills, competencies, and knowledge* needed to perform the current job and/or prepare for expanded responsibilities.
🚩 *Set 2-3*	🚩 *Set 1-2*

Key Elements of Strong Goals

Element 1

Goals Must Stretch You

Stretch goals are characterized by two key variables:

Difficulty: going beyond an individual's current capabilities and performance.

Novelty: requiring new approaches or ways of doing things in order to achieve the desired outcome.

Element 2

Goals Must Be S.M.A.R.T

Specific

What is the expected outcome?

Measurable

How will goal achievement be evaluated?

Attainable

What will it take to achieve the goal?

Results-oriented

Does the goal focus on the right results?

Time-defined

By when is the goal to be achieved?

Example

Initial Goal: Execute 5 live DIB virtual workshops.

Specific: Plan and execute 5 live virtual trainings

Measurable: 40+ attendees and 80%+ satisfied/very satisfied rating for each session

Attainable: With three executed live virtual workshops, and 25-person average attendance and an average 70% satisfaction rates the previous year, this is a challenging yet attainable goal which, with the proper resources, which we have, and strategy in place, would be motivating.

Results Oriented: aligns with the department priority to invest in the learning and development of the community

Timebound: will be completed by April 25th

S.M.A.R.T. Goal: Plan and execute five live DIB virtual trainings with 40+ attendees by April 25, 2021. Receive an 80%+ satsified or very satisfied average rating for each session.

Ways to Achieve Development Goals

Experience-based Learning	Education-Based Learning	Relationship-Based Learning
Jobs Projects Assignments	Courses Seminars Distance Learning	Feedback Mentors Colleagues Coaches

Check out the *EDW* *and* *CWD* *programming calendars to learn about the multitude of professional development trainings available to staff.*

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Identifying Your Development Goals

Reflect on the following questions to determine which developmental goals to prioritize:

What are the key skills and knowledge I need to develop in order to:
- **meet expectations** in my current and future role?
- be **even more effective** in my current role and eventually In my future role?

What important skills and knowledge can I develop to help
- address future **needs or challenges of my team**?
- help me accomplish my **career goals**?

What would make work more **fulfilling** for me?

Key Language

When writing your goals, provide evidence of forward motion and progress towards the outcome.

Sample language:

➢ **Increase** (funding, engagement, effectiveness)

➢ **Provide** (research, service, analysis)

➢ **Improve** (efficiency, transparency, communication)

➢ **Decrease** (expenses, inefficiency, costs)

➢ **Save** (time, resources, energy)

Design Your S.M.A.R.T. Goals

Crafting Your S.M.A.R.T Goal Statements

Setting goals helps you identify what you want to achieve. Crafting S.M.A.R.T. goals will help you ensure that your goals are both realistic and ambitious, and that you consider all the relevant details that will help to ensure the successful fruition of your goals.

Take time to thoughtfully complete the questions below. Each question is designed to give you greater clarity around what you wish to accomplish and what will allow you to achieve your goal.

Initial Goal
Write the goal you have in mind.

Specific
What do you want to accomplish? Who needs to be included? When do they need this by? Why should achieving this outcome be prioritized?

Measureable
How can you measure progress? How will you know if you've successfully met your goal?

Achievable
Do you have the skills required to achieve this goal? If not, can you obtain them? What resources do you need to accomplish this goal? Do you have access to these resources? If not, can you improvise? What is the motivation that's driving this goal? Is the amount of effort required on par with what the goal will achieve?

Break Your Goals into Actionable Tasks

S.M.A.R.T. GOAL	
I will improve my PowerPoint (PP) skills by May 1, 2021 so that PP design only requires 25% of my work time. I will develop my skills by taking free online courses and tutorials.	

Task 1	Complete 9-hr LinkedIn Learning Master PowerPoint course
Time Frame	Within 60 days - by 10/30/20
Resources	Utilize LinkedIn Learning courses, which have no cost to Harvard employees
Milestones	Be halfway through the course by 9/30
Measurable Results	Be able to create presentations that incorporate graphs, images, and other media in a couple of hours. I should also be able to efficiently use and create templates in PowerPoint that my coworkers can also use.

Layout Your Tasks for Your S.M.A.R.T. Goal

Break Your Goals Into Actionable Tasks

Identify the specific tasks associated with each of your goals and describe the timeframe, resources, milestones, and measurable results for each.

Finalized S.M.A.R.T Goal:

(Re-type goal here)

Task #1:

Timeframe	Resources	Milestones	Measureable Results

# Which Goals Should You Prioritize?

Prioritize goals that:

- Generate the most value for your organization

- Deliver the biggest improvements in your group's performance

- Best position you *and* your team to achieve even more success in the future

Take Action

1. Identify 2-3 key performance goals

2. Identify 1-2 professional development goals

3. Complete and save your electronic form in PeopleSoft
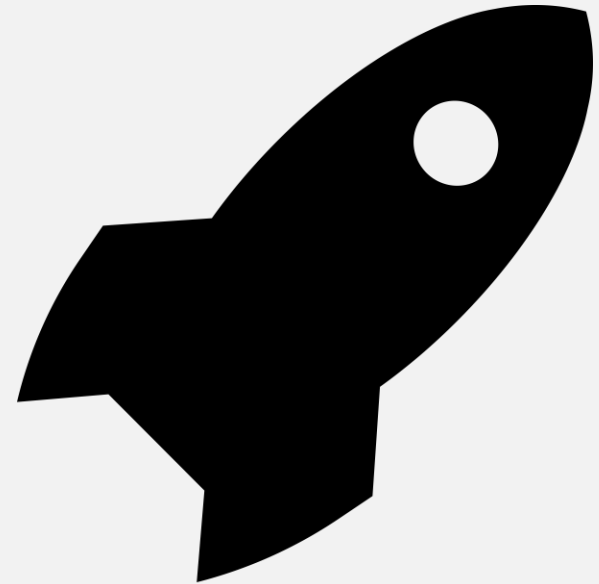
ePerformance Tools & Resources

Performance Management resources and tools can be accessed at:

http://hlc.harvard.edu/home/performance-management/

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Thank you!