Goal Setting Refresher

THE UNIVERSITY OF NEW MEXICO
Why Do We Even Do Performance Evaluations? To:

- Increase the quality of employee and manager feedback / discussions
- Align with university and corporate best practices
- Encourage participation and conversation around performance and goals
- Comply with UNM Policy 3230
6 Common Goal Setting Mistakes (AKA what NOT to do)

1. Setting unrealistic goals: the scope’s too big, timeline’s too short, resources aren’t sufficient
2. Underestimating completion time: thinking everything will go 100% to plan
3. Not reviewing progress throughout the year
4. Setting ‘negative’ goals (i.e., stop being late to work)
5. Setting too many goals: the brain can only focus on 3 – 5 goals at one time
6. Not identifying success measures upfront – how will we know the goal has been attained?
Best Practice Method
(AKA, what to do)

- Specific
- Measurable
- Achievable
- Results-Focused
- Time-Bound
Quick Tips & Pitfalls
Setting Goals & Reviewing Results

- Make personal needs a priority when discussing performance
- Let direct reports know that you have confidence in their ability to achieve their goals
- Seek out and listen to their concerns
- Ask for their ideas and input when creating goals and ways of tracking them
- Be open and straightforward about your expectations for them
- Offer resources and support, and help them remove barriers and obstacles
- Ensure expectations are clear
  - Make sure people understand both what the expected results are AND how they should go about achieving them
  - Compare each goal against SMART criteria to ensure this is an actual goal – not a task
  - Avoid ‘all or nothing’ goals – provide flexibility to adjust for success even if circumstances change
Setting Goals & Reviewing Results

- Individuals should collect and share information and feedback on how they’re accomplishing their goals
- Use the SBI format: describe the Situation, the Result, and the Impact
- Help create an environment where people feel safe if they have to report results that don’t quite meet the mark
- Set aside time during regularly occurring staff meetings for people to report successes and share lessons learned
- Offer timely, objective feedback based on facts
  - Balance developmental and positive feedback
  - Pass along feedback you receive from others (try using the SBI format mentioned above)
  - Help people redirect their efforts while there’s still time to correct the situation and experience some level of success
- Catch people doing things right!
Setting Goals & Reviewing Results

- Discuss performance throughout the year
  - Keep communication open to see whether your staff members are on track
  - Ask what support is needed to help the individual achieve their goals
  - Discuss opportunities for development through the year
  - Identify instances where a person is performing below expectations; readjust the goal if necessary

- Emphasize that performance discussions are two-way
  - Remind people that they should be soliciting feedback from peers, team members, and other clients throughout the year to share with you
  - Encourage them to share their thoughts and feelings on the time period under review
  - Encourage them to lead the discussion – sharing their data and results, and only them providing any additional data
Setting Goals & Reviewing Results: Watch For These Pitfalls!

- Setting goals that aren’t SMART
  - If goals aren’t specific, measurable, achievable, results focused, and timely, people are:
    - More likely to fall short of expectations
    - Less likely to clearly understand how to focus their efforts

- Dictating goals to your staff
  - If you don’t collaborate or allow staff to give input into their goals:
    - The person won’t have buy-in and commitment to the goals
    - Whatever trust exists in the relationship will be damaged
    - You’ll encourage compliance – not commitment
Setting Goals & Reviewing Results: Watch For These Pitfalls!

If you don’t share both positive and negative feedback examples, you risk:

- Failing to help them improve performance / meet expectations
- Leave them wondering what they’re doing well and what needs improvement
- Cause people to be overwhelmed when their only feedback is that they need to ‘do better’

Demonstrating a negative attitude to the Performance Evaluation Process means that:

- Individuals fail to receive appropriate acknowledgement of their accomplishments
- People may receive only negative feedback
- People aren’t given a chance to learn how to improve and become more successful
- Individuals take on that same negativity and share it with others
Failing to encourage direct reports to track their own progress and share feedback they receive with you, means they might:

- Miss out on opportunities to take action necessary to stay on target or know how to adjust their plans to achieve success despite set backs
- Lack the information they need to determine their own evaluation of their performance
- Face unpleasant surprises about their performance during the annual performance evaluation discussion
Why You Should Consider Including ‘Stay Interviews’ In Your Discussions
Best Practice: Add ‘Stay Interviews’ to Your Discussions

- Only 1 in every 5 employees feels highly valued at work
- You can help raise this number by having focused conversations geared toward career development!

Four focus areas of stay interviews:
- What the employee likes about their job
- What is challenging for the employee in their job
- The employee’s career aspirations
- How you, as the manager, can help
Sample Stay Interview Questions:

- What about your job makes you want to jump out of bed in the morning?
- What about your job makes you want to hit the snooze button?
- What did you enjoy about your last position that you’re not doing/experiencing now?
- What makes for a great day at work?
- What talents, interests and skills do you have that we haven’t made the most of?
- Is the organization providing you with opportunities to grow and develop personally and professionally? What opportunities are interesting to you?
- What kind of feedback would you like about your performance that you’re not currently receiving? From me? From your co-workers?