

# Goal Setting Refresher

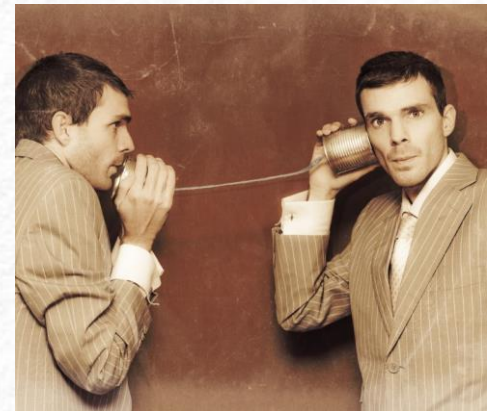


# Why Do We Even *Do* Performance Evaluations?

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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)

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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)

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# Quick Tips & Pitfalls





# Setting Goals & Reviewing Results

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- ❑ 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

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- ❑ Individuals should collect and share information and feedback on how they're accomplishing their goals
  - ❑ Use the SBI format: describe the Situation, the Behavior, 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

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- ❑ 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!

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- ❑ 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!

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- ❑ 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

# Setting Goals & Reviewing Results: Watch For These Pitfalls!

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- ❑ 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

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- ❑ 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:

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- 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?