

Welcome to

Setting Goals and Performance Standards

B·W
BALDWIN
WALLACE
COLLEGE

Presented by

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Objectives of Workshop

At the conclusion of this workshop you will be able to:

- Define goals and performance standards.
- Identify and set performance standards that are specific, measurable, achievable, relevant, and time-framed, using concrete active language.
- Involve staff in creating their own individual performance standards.
- Negotiate to develop performance standards for staff that address both desired results and staff members' capabilities.
- Monitor your staff members' progress toward their goals by holding individual review meetings.

What is it?

Set performance goals



Provide coaching and feedback



Measure and evaluate



Manage performance gaps

Creating individual goals

Organization's mission statement



Your job description



Performance standards



Action plan

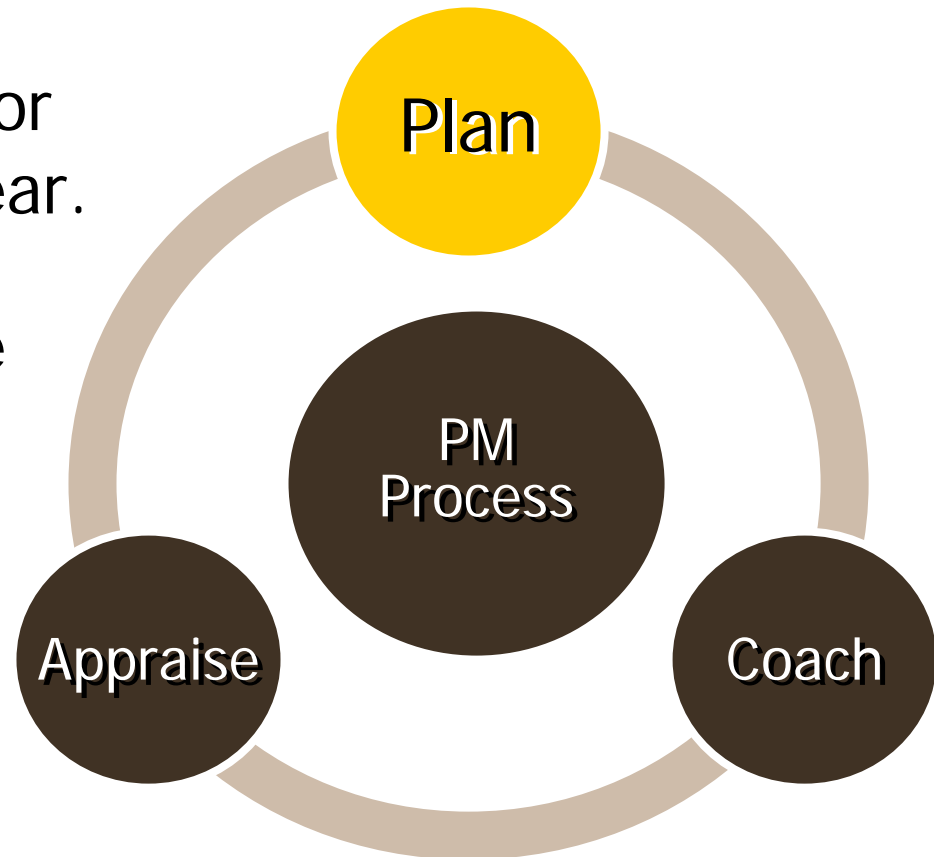
Planning

- Explain performance measurement system
- Define job responsibilities
- Set goals

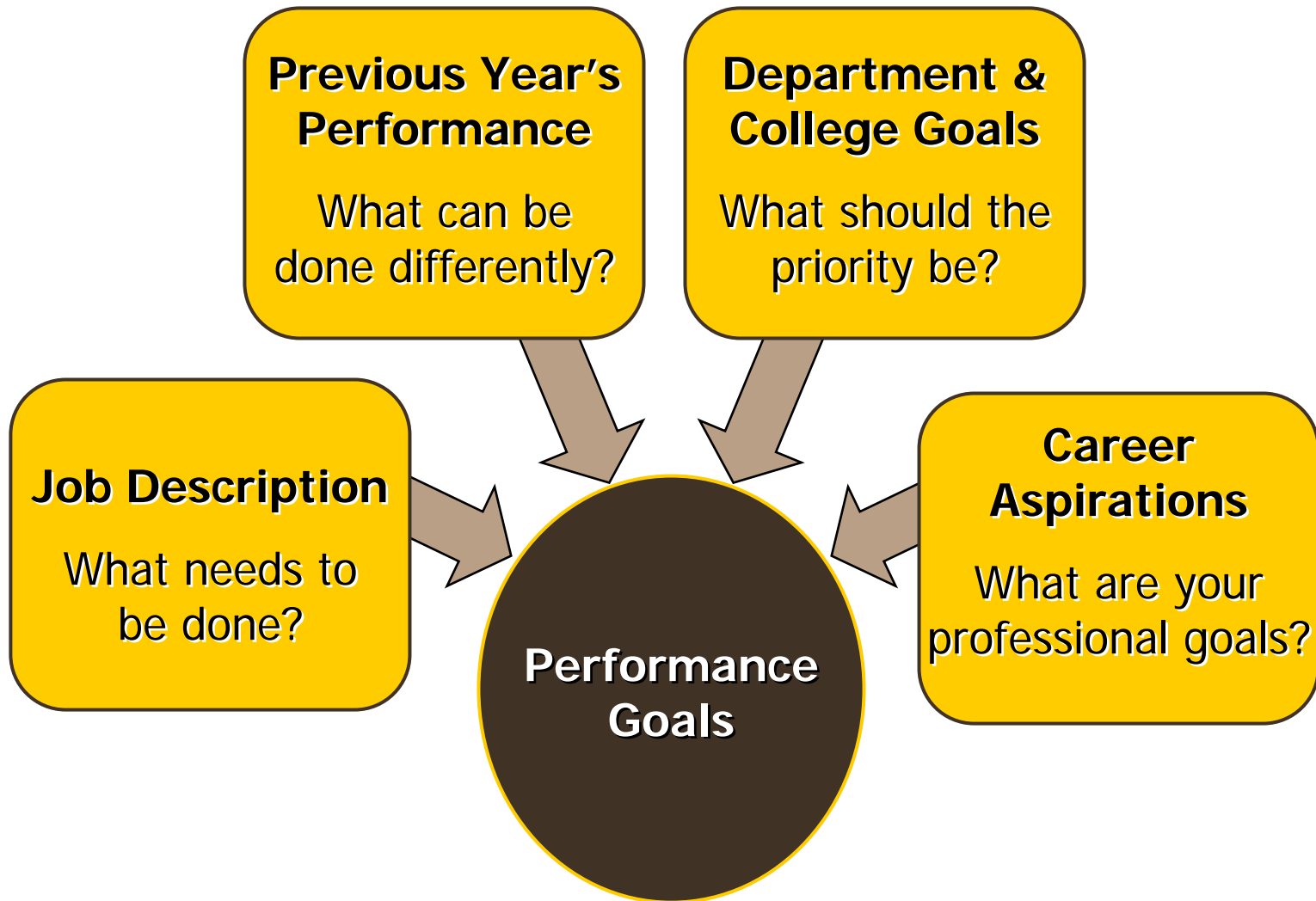


Planning

- Planning: Developing a common understanding to guide performance.
- Establish goals for the upcoming year.
- Discuss/enhance performance standards and expectations.

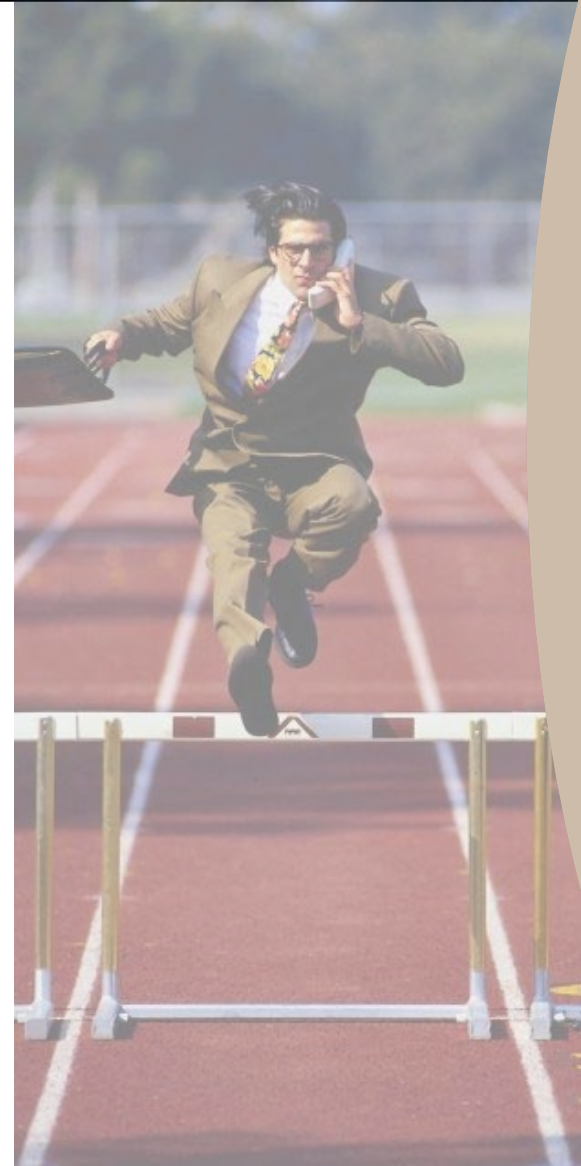


Planning: Setting Goals that Work



The Process

- Have a REAL plan
- An Orientation to YOU
- Link plan to job description
- Link plan to actions
- Link plan to an outcome
- Know what success looks like



An Orientation to You



- Here's who I am...
- Here's what I stand for ...
- Here's what I expect ...
- I will always support my team members who...
- I have no tolerance for ...

YEAR-LONG Process

- Do you know how your employees are doing?
- Do you know what they are doing?
- Do you know what they are going through?



YEAR-LONG Activities



- Goal Setting
- Informal conversations about work
- Informal conversations about the person
- Informal conversations about dept/organization
- Formal conversations

Planning: Tips on Setting Goals

- Look at position, performance, and department.
- Follow the S.M.A.R.T. guidelines.
- Limit to 3-5 goals. At least one should have a professional development focus.
- Management and employee involvement.
- Adjust throughout the year, if necessary.

Writing SMART Goals

S pecific	<ul style="list-style-type: none">▪ Precise, clear, unambiguous▪ Not left open to interpretation
M easurable	<ul style="list-style-type: none">▪ States what will be tracked and how▪ Uses the phrase, " to be measured by..."
A chievable	<ul style="list-style-type: none">▪ "Doable" and controllable▪ Attainable with a stretch!
R elevant	<ul style="list-style-type: none">▪ Structured in terms of output▪ Uses an "action" verb
T ime-bound	<ul style="list-style-type: none">▪ Spells out timelines, milestones, deadlines▪ Has a date on it

Realistic standards

- performance not met
- performance met
- performance exceeded

Team Exercise

- Think of a time that you know your performance definitely improved.
Ask yourself these questions:
 - What stimulated the desire to improve?
 - How did you know what to improve and how to improve?
 - What type of advice (feedback) did you receive?
 - How did you sustain the improvement?

Getting “buy-in”

- Inclusion
- Influence
- Information

Make communicating standards part of your environment

- Involve co-workers
- Listen to employees
- Have at least one meeting to specifically discuss standards with each employee

Caution

Employees do not need to be included in every decision, know every detail, or make decisions out of their realm of their authority. However, in almost all situations employees with more information, authority, and feeling of inclusion are more productive, happy.

Planning: Using the Annual Evaluation (AE) Form

1. Manager confirms goals for upcoming year and record on Annual Evaluation (AE) form.
2. Manager adds department – specific success factors (if applicable).
3. Manager and employee review goals and success factors.

Planning: 3 Tips for Using Performance Success Factors

- Review at the beginning of the performance cycle.
- Explain the different levels of success where applicable.
- Start small with department specific factors.

Planning: Performance Success Factors

Behaviors that are fundamental to the way we do work at B-W. The “how” of getting the job done.

All employees:

- Efficiency and time management
- Communication and Teamwork
- Effectiveness
- Customer Service Orientation
- Adaptability

Department specific:

Management and Leadership:

- Leadership
- Managerial
- Budgetary & Planning
- Supervision

Planning: Performance Success Factors

Efficiency & Time Management:

Includes punctuality and productivity issues.

Communication & Teamwork:

Performance specifically related to communication and teamwork.

Effectiveness:

Includes the quantity and quality of work, as well as organizational skills necessary to perform successfully.

Planning: Performance Success Factors

Customer Service Orientation:

Includes attitude, behavior, interpersonal, and problem-solving skills that enable an employee to respond to internal and external constituent needs and expectations in a positive manner.

Adaptability:

Includes flexibility needed to fulfill job responsibilities including adapting to changes in the work environment and accepting appropriate feedback.

Planning: Leadership, Managerial, and Supervision Success Factors

Leadership:

Engages in strategic thinking that supports the College's mission...Demonstrates leadership by taking action despite risk or discomfort.

Managerial:

Responsively manages overall accountability for assigned work group...Implements employee Performance Management Program effectively.

Planning: Leadership, Managerial, and Supervision Success Factors

Budgetary & Planning:

Plans, implements, and manages change effectively.

Managerial:

Challenges, inspires, and appreciates staff members... Establishes positive working relationships within the campus activity... Delegates assignments appropriately to staff members.

Overall Rating – Performance Summary

OUTSTANDING PERFORMANCE	EXCELLENT PERFORMANCE	SUCCESSFUL PERFORMANCE	NEEDS IMPROVEMENT	UNSATISFACTORY
<p>Performance is clearly outstanding and consistently exceeds the requirements and the expectations of the job. Based on job responsibilities, the employee makes extraordinary contributions to the College's mission.</p>	<p>Employee demonstrates performance beyond expectations for the position. Performance is well above the competent level.</p>	<p>Employee performance meets the criteria and standards of job performance. Performance is steady, reliable, and is maintained with appropriate supervision</p>	<p>Meets some, but not all, expectations. Performance is marked with inconsistency demonstrated through periods of poor job performance. Performance requires improvement or further development.</p>	<p>Performance is unacceptable and does not meet standards. Major improvement is needed.</p>

Exercise

- In small groups you will be assigned a Performance Success Factor to develop behavioral examples for that success factor for outstanding, excellent, needs improvement and unsatisfactory.

Baldwin-Wallace College Mission Statement



Baldwin-Wallace College
is an academic community committed to the
liberal arts and sciences as the foundation
for lifelong learning.

The College fulfills this mission
through a rigorous academic program that
is characterized by excellence in teaching
and learning within a challenging,
supportive environment that enhances
students' intellectual and spiritual growth.

Baldwin-Wallace College Mission Statement



Baldwin-Wallace assists students in their preparation to become contributing, compassionate citizens of an increasingly global society and encourages their pursuit of personal and professional excellence.

SWOT Analysis

<p>Strengths</p> <p>Internal positive aspects under your control</p>	<p>Weaknesses</p> <p>Internal negative aspects under your control</p>
<p>Opportunities</p> <p>External positive aspects not under your control.</p>	<p>Threats</p> <p>External negative aspects not under your control.</p>

Extracting Goals from SWOT

- How can you capitalize on strengths?
- What must be done to minimize weaknesses?
- How can you take advantage of opportunities that lie ahead?
- What can you do to avoid or lessen threats?

***“People are enthusiastic, motivated,
creative, and totally committed...
except for the eight hours a
day they work for you!”***

Tom Peters
“A Passion for Excellence”

Performance standards chart

General goal	What is to be done?	When is it to be done?	How will it be measured?	What organizational goal does this link to?
Strengthen relationships with key stakeholders				
Increase employee retention				
Set up a new database				

Elements of an Action Plan

- Goal
- Activities
- Who is Responsible
- Resources
- Timeframe
- Monitoring Method



Goal Action Plan

1. Identify the necessary chain of actions:
 - a) Work backwards.
 - b) Based on team roles, determine who's responsible.
2. List the projected results or measurement criteria.
3. Note any barriers or obstacles:
 - a) Identify resources needed.
 - b) Identify person to contact.

Achieving Goals...Action Steps

Phase 1 - How will you do it?

Based on your goals, list action steps you will take to achieve them.

Phase 2 - Determine - What could go wrong?

What difficulties do you foresee, short and long-term?

Phase 3 - What might you do about them?

List all preventive action steps to keep them from happening and all contingency action plans for each step should unforeseen problems arise.

Goal: Create marketing report

Action step	Date	Criteria	Barriers obstacles	Resources needed
Distribute Report	6/30	100% delivery	Time involved	Dave, Mail
Produce Report	6/25	50 copies	Print shop	Emma, Kinkos
Prepare Report for Print	6/20	100% accuracy	Desktop publisher	Emma, Publications
Write Report	6/18	100 % accuracy	Too much input	Dan, Tom, Bill, Sue
Gather Information	6/15	100% accuracy	Getting enough info	Dave, Research Division

Common Goal-Making Mistakes

- **Conflicting Goals**
 - Aligned with the mission?
 - Compete for resources?
 - Prohibit the completion of other goals?

- **“Wantism” vs. Realism**
 - Based on something that can/should happen?
 - Logical, rational reason for the goal?

- **Too High/Too Low**
 - Based on consistency of performance?
 - Encourage some stretch?

Know Success

- Use the evaluation form as a message of success.
- Explain the area(s) that are most important.
- Define area(s) that need more attention.
- Go back to the job description:
 - Narrow the duties assigned
 - Expand the duties assigned
 - Change the duties assigned
- Redefine success and the next evaluation period.

Measuring Success



Quantitative Measures

Qualitative Measures

Writing Measurable Goals

What is to be done? (Action verb)	How much is to be done?	When is it to be done?	How will it be measured?	What organizational goal does this link to?

Summary – Key Concepts

- Manager plays key role in developing plans, goals, and performance standards with employees.
- Many benefits of this process:
 - Committed staff members.
 - Focus is on most important things.
 - Staff members can perform and judge their work against clear, measurable standards.
 - Manager has a clear standard with which to observe, coach, and support performance.

Summary – Key Concepts

- Good plans enhance smoothness of day-to-day operations.
- Lack of planning causes confusion, waste, and duplication of effort.
- Once plans and standards are set, staff members must be held accountable for results.
- Staff members involved in planning their work are more committed to its achievement.

Summary – S.M.A.R.T.-Based Performance Standards

S.M.A.R.T.-based performance standards are:

Specific – Detailed and clear.

Measurable – Quantity and unit of measure stated.

Achievable – Individual has skills and resources needed to accomplish goal.

Relevant – An output is produced, not an activity.

Time-Framed – Completed by a definite time.

Summary – Skill Points

- State broad goal of plan and the staff member's role within it.
- Ask staff member's view of what his/her performance standards should be.
- Negotiate by modifying unrealistically high or low performance standards.
- Agree on performance standards that are S.M.A.R.T.-based.
- Confirm staff member's commitment and set up review.

Course Review

- What are the key learnings you are leaving with?
- What do you need more help with?
- What questions do you have?

Thank
you



*for your participation and
attendance today!*