Individual Goals

Each employee will be charged with three to five individual goals. Unlike the institutional goals, individual goals are NOT intended to cover all aspects of an employee's work product. Instead, these goals will focus on factors such as key results, outcomes, and/or deliverables.

There is not one specific way to write individual goals. Instead, the development of individual goals is a flexible process that allows the goals to be tailored to each employee and his or her role. As a supervisor, you are encouraged to work with your employee to discuss and determine his or her individual goals for the upcoming cycle. Making the goal development process a collaborative one will give your employee the chance to be fully invested in his or her role. The more invested an employee is in achieving a goal, the more likely the goal will be accomplished and completed well.

SMARTER Goals

As you develop individual goals with your employee, follow the SMARTER model for the best results:

Specific – *What needs to be accomplished? What are the outcomes?*
Although specific tasks can be included in the description, the emphasis should be on the overall deliverable or end-product of the action. The specific details may come from your answers to the other SMARTER categories.
Measureable – *What data can be used to define success?*
How will you know that this has been accomplished? How can it be measured? You may be able to use quantitative metrics, such as customer satisfaction ratings or fund-raising target amounts, but there can also be qualitative outcomes, such as compliance requirements like established report formats or design specifications.
Achievable – *Is this challenging, but realistic?*
If a goal is too easy to achieve, then it may not be an effective goal. At the same time, the outcome should not be too difficult to achieve. It may help to think about what level of outcome would not be value-added (too small a stretch for the employee) and what would be unattainable (too big a stretch for the employee).
Relevant – *Does this align with broader goals and/or needs?*
A goal should be relevant to an employee and the university. Does the goal advance the vision and mission of UNCC and does it help the university maintain its standing on the campus and in the community? Relevant goals help employees keep focused on what's important.
Time-Bound – *What are the deadlines/milestones?*
Similar to the achievable aspect, is it reasonable that this goal be completed in this performance cycle? If so, what are the deadlines? What key milestones can be defined to measure progress along the way?
Expectations – *Is it ethical, exciting, and enjoyable?*
This is sometimes called the E3 factor. Is the goal ethical? Does the goal generate some excitement in the employee or work unit (which is an indicator that it may be a worthwhile goal or fulfilling to complete)? Is it enjoyable for the person(s) who has to accomplish it? Of course, developing all "fun" goals is not always possible. However, it can give the supervisor some awareness of how much additional support and encouragement might be needed to help the employee succeed.
Resources – *What will be provided to assist this endeavor?*
There are many great goals out there, but if employees don't have the resources they need to accomplish them, then they won't get very far. The outcomes of the goal need to be consistent with the resources available, and the employee may need guidance to know what tools and resources are available to them.

Ways to Write Individual Goals

There are countless ways to create individual goals. We are going to offer two possible perspectives that you may consider using as you and your employee develop these goals: (1) the SCOPE perspective, and (2) the FUNCTION perspective.

SCOPE

You may consider developing an employee's goals based on various levels or scopes. This method balances "big picture" goals that connect an employee with university or division initiatives with employee-specific goals that pertain uniquely to an employee's distinct role or responsibilities. This perspective telescopes from division-wide goals, down to work-unit or job-class goals, and further to employee-specific goals, allowing your employee to set goals at each level of the organization.

Division-Wide Goals	Departmental / Work-Unit Goals	Employee / Position-Specific Goals
• Are often tied to university or division strategic goals or initiatives • May have some variation based on employee roles	• Goals to improve/sustain work product or team dynamics • Goals relevant to a particular type of work or team needs	• Specific to the regular duties of the employee • Specific to the development of the employee (i.e. a "stretch" goal)

FUNCTION

You may also consider developing an employee's goals based on various functions within his or her role. This perspective enables you and your employee to breakdown the elements of his or her role into different focus areas, highlighting key responsibilities or projects for the upcoming cycle. This may result in some overlap with elements of the institutional goals.

Critical-Function Goals	Project-Oriented Goals	Forward-Focused Goals
• Based on key deliverables that are essential to the position • Often compliance-driven	• Based on time-specific work in current cycle • Based on unique projects for current cycle	• Activity more aligned with university strategic goals • Designed to move the organization forward in some way

MATRIX

Combining the SCOPE and FUNCTION perspectives allows for nine different ways to establish goals:

Scope-Function Matrix	Critical Function	Project Oriented	Forward-Focused
Employee/ Job Class	✓	✓	
Department/ Work Unit		✓	
Division			✓

Wording to Get You Started – Individual Goals

(**ACTION**) (**NOUN**) by (**DATE**) in order to (**OUTPUT**)

For example:
- Attend _____ by _____ and apply _____ in order to _____.
- Execute _____ by _____ in order to _____.
- Participate in ____#____talent conversations by _____ in order to _____.

JUST FILL IN THE BLANKS!

Sample Individual Goals

The following are four samples of what an employee's individual goals may look like. Each goal description incorporates most elements of the SMARTER goal model, as well as establishes what actions meet goal expectations and what actions exceed goal expectations.

Your individual goals do not have to follow the exact format of the following examples; you are encouraged to develop and write individual goals based on the needs and role of each employee.

SAMPLE 1	Outreach Initiative	WEIGHT:	15%

Description:

Perform at least two customized presentations (30-60 min) to another department/student group in order to increase visibility, awareness, and understanding of our department and best practices across campus. Presentations should be based on needs for those areas.

- Due prior to end of performance cycle (March 31, 2017)
- Two presentations may have the same content. You can develop the materials independently, in conjunction with other department staff, or modify existing materials.
- Preferred audiences are employee teams, student groups, or organization-wide.
- Presentation feedback, anecdotal information, and direct observations will be received from participants and supervisors.

Exceeding expectations may include presenting additional, different programs (different topics/audiences) within this cycle; creating significant, new training materials that can be used by other colleagues in order to keep the presentation progressing; and/or doing strategic follow-ups with participants to address specific concerns.

SAMPLE 2	New System Implementation & Expertise	WEIGHT:	10%

Description:

Achieve proficiency in new office system/program by August 31, 2016 in order to provide appropriate consultation to supervisors and employees on required and preferred processes so that supervisors and employees can benefit from the new system/program and utilize it successfully.

- Be able to look at current system/program and provide useful and appropriate suggestions on transitioning smoothly to new system/program.
- Be able to review elements and submissions to the system/program to determine if they are appropriate, effective, and functioning.
- Be able to provide guidance on how to use the system/program.

Exceeding expectations may include being able to provide ad hoc training to departments as requested on system or program-related topics; regularly using available toolkit resources in consultation; and/or drafting additional toolkit resources.

SAMPLE 3	Procedural Guide Projects	WEIGHT:	10%

Description:

Complete a procedural guide (generally 5-10 pages) to address at least one office process, selected from a provided list in order for colleagues to have ready access to relevant information so that our team can be confident in providing consistent, timely, and useful guidance to our constituents.

- First draft should be completed by October 31; final guide complete by March 31
- Procedures should follow an approved format based on discussion with supervisor
- Procedures should address issues such as relevant policies, coordination with other university groups, work flows and process steps, key questions that need to be addressed, and reporting requirements, if applicable

Exceeding expectations may include explaining (in)frequent variations that may require differing approaches; reviewing past related processes to evaluate and describe consistency/appropriateness; providing suggestions for related process improvements; and/or completing additional projects.

SAMPLE 4	**Strategic Plan Implementation**	**WEIGHT:**	5%

Description:	Determine at least one element of the campus-wide strategic plan to which your role can contribute and support in order to help the university achieve its overall strategic goals. • Determine the goal(s) you directly support and be prepared to discuss by second talent conversation • Make consistent efforts to incorporate relevant elements of the strategic plan in your projects and programs this cycle • Prepare to present and discuss your efforts, successes, and challenges regarding your contributions to the strategic plan at final talent conversation Exceeding expectations may include collaborating with other colleagues or departments in your strategic efforts; finding ways to support more than one strategic plan; sharing and presenting your efforts to the entire staff/department; and/or being a champion and model of the university strategic plan for the department.

SAMPLE 5	**NinerTalent STAKES Performance Program Participation**	**WEIGHT:**	5%

Description:	Become familiar with campus's new Performance Program in order to be more engaged in the development and performance of your employee. • Attend supervisory training and review Performance Guides for clarity • Schedule three talent conversations for the transition cycle • Assist in the completion of your Performance Plan by May 15 • Regularly document and discuss your efforts, successes, and challenges within your role to be more prepared for each talent conversation Exceeding expectations may include attending all available Performance training workshops and programs (including e-learning; serving as a model and enthusiast of the NinerTalent Performance program within your unit; taking a consistently proactive approach by preparing ideas, materials and resources for each talent conversation.