Individual Goal Setting Guidelines

Introduction

The most significant success factor for strategic accountability and alignment is the linking of individual work to the Mission, Vision, Values and Strategic Goals of the organization. Many staff regularly set (annual) goals and objectives for their work. This guide is intended, then, as a refresher, as a set of tools for goal setting and as an introduction to individual goal setting.

Why Set Goals?

Goal setting helps us to establish a clear line of sight between what we do as individuals and the overriding strategies and goals of the organization. It brings clarity to our individual contributions and helps ensure that we all are collaborators in achieving the Mission and working towards our Vision.

Goals not only guide our performance but offer a solid and fair basis for annual performance support discussions. They lead us towards a sense of accomplishment and an opportunity for recognition when action plans are completed, and results are achieved.

The process of goal setting and action planning opens discussions between an employee and his/her manager to ensure that roles are clear, that expectations and priorities are shared, that resources needed to achieve goals are provided, and that the necessary supports are in place to be successful.

When are Goals set?

Goals may be set at any time. They can be used to guide major projects or to achieve significant components of one's role. It is expected that at least once per year (at the start of a departmental planning cycle), individual goals are set and recorded by all employees in collaboration with their manager. By doing this, the employee and manager set the stage for ongoing feedback, for tracking accomplishments and for preparing for the annual (in some cases, biannual) performance review discussion.

Who sets the goals?

All employees are encouraged to set their own goals, with agreement from their manager. This builds accountability. By setting one's own goals, the employee takes responsibility for his / her own work, defining priorities and making the commitments needed. This approach is a valuable demonstration of personal leadership required for collective success. Individual goals must be negotiated and agreed upon between manager and employee.

What information is used to set Goals?

Some key information sources that should support goal setting at the individual level include:

1. the organization's Vision, Mission, Values and strategic priorities

2. departmental priorities

3. individual job descriptions

4. past performance and learning / growth needs identified

5. career plans

6. commitments already in place for individual contribution

What steps do we follow in setting Goals?

1.   If Goals have previously been set and agreed upon, review them to ensure that individual contributions are consistent with the position description and that they support the organization's strategic priorities.

2.   Review the information sources listed above

3.   For each organizational and departmental strategic priority ask: Where can I make the greatest contribution to our collective success?

4.   Plan on setting at least 3 and not more than 10 goals in total for a single year. **Do not include routine work. Try to focus on areas of improvement or enhancements.**

5.   The next step is to set actionable, future focused goals for each area you have chosen. The following guidelines for setting SMART goals should help you.

Specific: Exactly what is it you will accomplish? Be clear on one key result

Measurable: Consider how you will know you have succeeded; if possible, use a

quantitative measure that will indicate success

Attainable: Ensure your objective is challenging, yet reasonable; Be sure that

accomplishing the objective is within your control

Relevant: Choose an objective that will enable a significant contribution

Ask whether it will make a difference

Time bound: Ensure there is a specific date for completion within the defined time period chosen

Some examples might be:

a)   By June 30, 2019, I will develop and deliver to my colleagues a session on facilitating interprofessional student discussions in a simulated environment.
b)   By August 30, 2019, I will have successfully implemented and evaluated the interview process, ensuring the required number of successful candidates are recruited for all programs.
c)   By October 31, 2019, I will have successfully implemented the Accountability Framework, with goals set and recorded for 80% of all employees.
d)   By December 31, 2019 I will have co-authored at least one paper about Interprofessional Education.

Additional Hints:

- avoid ambiguity – ensure each goal contains one easily understood outcome
- make it simple and easy to understand by you and your manager
- make sure it is within your control (realistic, achievable)
- focus on what you will do

(to complete the process):

6.   Hold a planning discussion with your manager or director. Share the goals you have written. Ensure that you and your manager are clear on the content and how success will be measured. Be open to suggestions (e. g. that may better align your work with the department's goals, that may be more within your control or that may be more consistent with the role).

7.   Agree upon and finalize the goals for which you will be accountable in the following year or two years.

8.   Record your (3-10) goals (usually on the Performance Review Record)

9.   Keep goals handy as a source of ongoing review, discussion and feedback.

Ongoing Review

Once goals are set and recorded, the process of ongoing personal reflection, measurement of success and regular management feedback and support begins.

Set up your own dates to check in on your goal achievement. For example, I set myself a calendar reminder once per month to review my current Professional Development Plan and goal Action steps.

Schedule a periodic check in with your supervisor (perhaps mid-way through the year) to review goals and get feedback.