



Performance Management for Employees (Writing SMART Goals)

Participant Guide

Training provided by:

CWU Human Resources, Learning & Development Team

CLA@cwu.edu

Mitchell, First Floor

For more professional development opportunities visit our website at:

www.cwu.edu/hr/learning-development

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Purpose

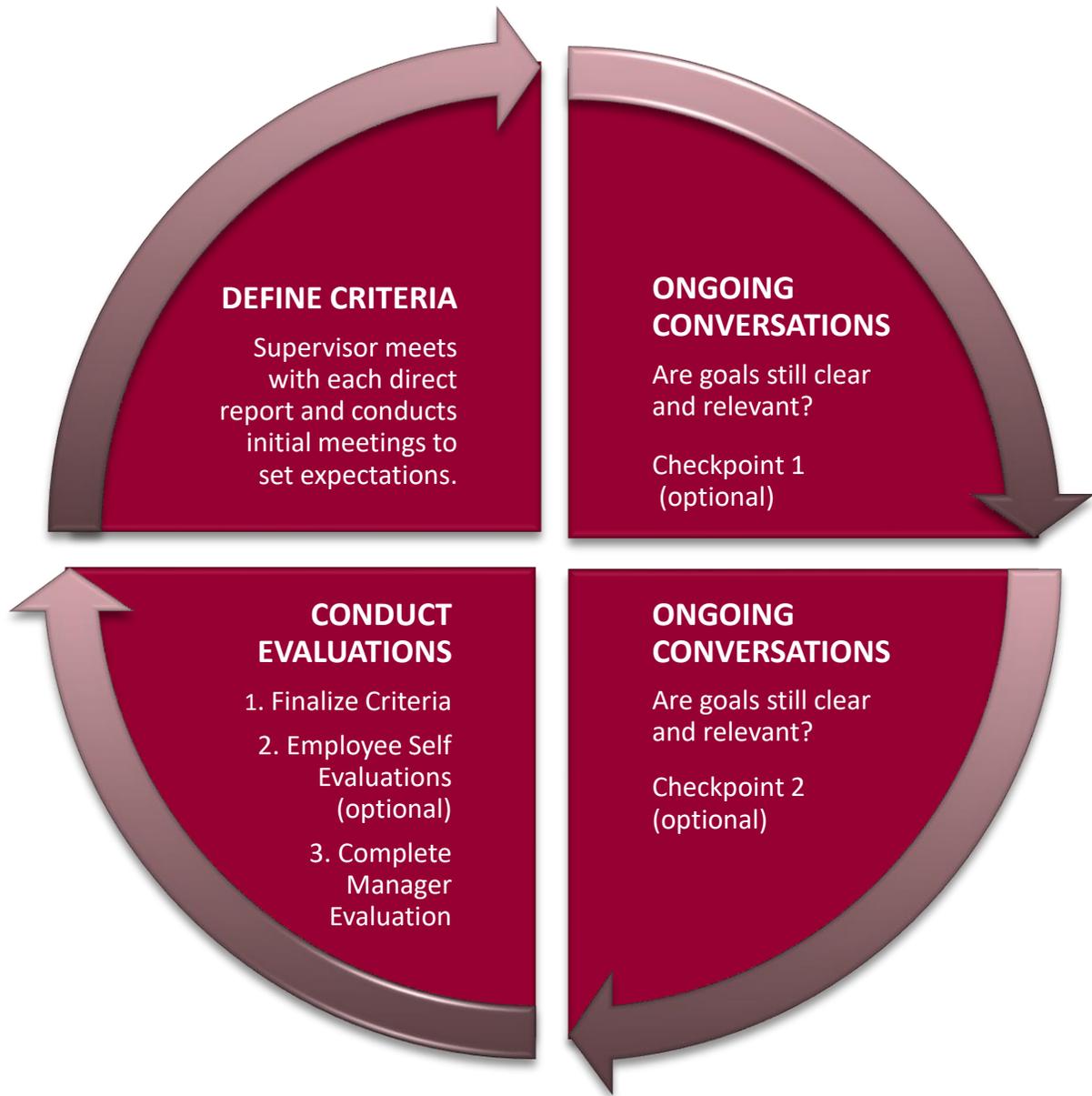
Writing useful goals requires careful thought, consideration, and time, but the extra effort can make all the difference for both employees and supervisors in understanding expectations and evaluating performance. In this workshop, you will learn about the different types of goals. You'll be introduced to the criteria that distinguishes a well-written goal from others. Finally, you'll have the chance to practice writing SMART goals specific to you and your role at CWU.

Learning Objectives

- Recognize the elements of a well-written goal
- Understand the two main types of goals
- Compose SMART performance and development goals specific to you and your role at CWU



CWU Performance Review Cycle



The 2017-2018 fiscal year was the first year for the new ePerformance system at CWU. Based on feedback, due dates were modified as well as the timeframe of the Performance Review Cycle. Updates are reflected in the ePerformance system. For more information about Performance Management at CWU, see this web page: <https://www.cwu.edu/hr/supervisor-resources/performance-management>.

Questions? Please check in with your supervisor.

Successful performance management requires commitment and collaboration between employees and supervisors.



Role of Employee

<p>Planning</p>	<ul style="list-style-type: none"> ✓ Meet with your supervisor at the beginning of the performance management year. Be ready to discuss your job duties and how they support CWU’s mission and your departmental objectives. ✓ Let your supervisor know if you are unclear about job duties or expectations. ✓ Ask questions about what success looks like. ✓ Read through CWU Competencies and consider how you can incorporate them into the way you do your job.
<p>Performance</p>	<ul style="list-style-type: none"> ✓ Periodically throughout the year, ask your supervisor for feedback on your performance. ✓ Talk to your supervisor about your progress as well as any obstacles to improvement. Consider solutions and share how your supervisor can help remove barriers to help you succeed. ✓ Write down when you do well or receive accolades so you can make sure your supervisor knows about accomplishments. ✓ Revisit your goals throughout the year to ensure they stay top-of-mind.
<p>Development</p>	<ul style="list-style-type: none"> ✓ Take responsibility for your own continuous performance improvement and development. ✓ Let your supervisor know if you’d like to build a skill. Consider how the new skill will strengthen your ability to do your job and how it will benefit the team and your departmental objectives.
<p>Review</p>	<ul style="list-style-type: none"> ✓ Monitor your performance by asking others to tell you how you’re doing and by keeping notes on your progress. ✓ Prepare for the review discussion by collecting/reviewing notes on your performance. ✓ Participate in the review meeting by showing your supervisor any notes you’ve made about your accomplishments and by suggesting things that might help you during the next performance management process year.

Role of Supervisor

Planning	<ul style="list-style-type: none"> ✓ Explain to employees how they help the department attain goals. ✓ Make sure they understand job duties and expectations. ✓ Explain CWU competencies; what is expected from the employee and why. ✓ Work with employee to create goals and apply a strategy to revisit them. ✓ Let employees know they are responsible for taking an active role in managing and assessing performance throughout the year.
Coaching	<ul style="list-style-type: none"> ✓ Provide frequent informal coaching. ✓ Celebrate exemplary work when it happens. ✓ Identify ways employees can develop and improve, and work with employees to create development plans. Ask employees for suggestions and encourage them to lead the plan and take an active role. ✓ Communicate new opportunities and changes that affect employee work. ✓ Make informal notes (perhaps on a calendar) when employees do a good job, follow through on development plans, or have problems doing so. Notes will help with checkpoints and reviews. ✓ Keep track of praise or complaints from customers regarding employee work.
Review	<ul style="list-style-type: none"> ✓ Put together saved notes about employee performance and assess performance based on job duties, goals, and competencies. ✓ Ask employees for feedback on how they performed during the year. Comments from employees may remind supervisors of particular instances of good or poor performance, as well as any extenuating factors. ✓ Complete final review in ePerformance and discuss competency ratings and comments with employee.

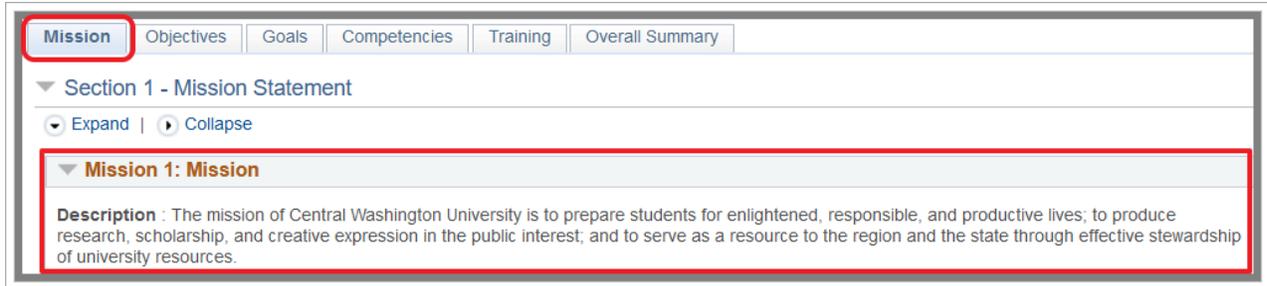
Messages from CWU President to *Inform How We Operate*

As you write your goals this year, you must keep in mind that *the way you accomplish them should be informed* by the messages delivered to the CWU community by President Wohlpart in his 2021 State of the University Address:

- **Message #1** – elevate *shared governance* and *shared leadership*
- **Message #2** – embody an ethos of “*deep care*”
- **Message #3** – remember the deep purpose of our work...to *help transform the lives of our students, their families, and their communities*

CWU Mission

The mission of Central Washington University already defaults into your Performance Document in MyCWU:



Mission Objectives Goals Competencies Training Overall Summary

▼ Section 1 - Mission Statement

Expand | Collapse

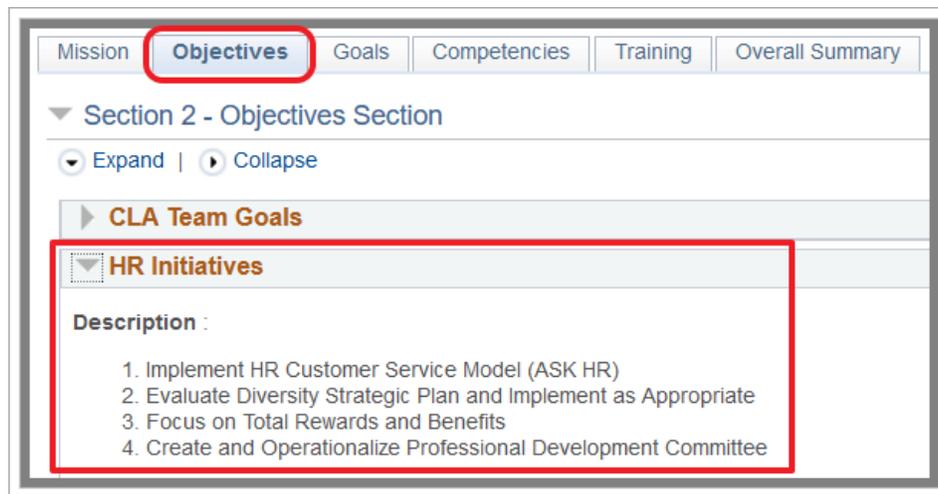
▼ **Mission 1: Mission**

Description : The mission of Central Washington University is to prepare students for enlightened, responsible, and productive lives; to produce research, scholarship, and creative expression in the public interest, and to serve as a resource to the region and the state through effective stewardship of university resources.

As you are working on Goals with your supervisor, it is important to ensure that they complement CWU's Mission.

Department/Division Mission

Your supervisor may or may not have entered your Department's Mission into your Performance Document.



Mission **Objectives** Goals Competencies Training Overall Summary

▼ Section 2 - Objectives Section

Expand | Collapse

▶ **CLA Team Goals**

▼ **HR Initiatives**

Description :

1. Implement HR Customer Service Model (ASK HR)
2. Evaluate Diversity Strategic Plan and Implement as Appropriate
3. Focus on Total Rewards and Benefits
4. Create and Operationalize Professional Development Committee

Regardless of whether or not your supervisor added your Department's Mission into your Performance Document, you should be mindful of it as you are working on Goals with your supervisor to ensure they align nicely with this mission as well.

Brainstorm Projects, Events, Activities, or Skills

Projects, Events, Activities, or Skills

What are some things your department/program will rely on you to lead, participate in, complete, or learn in the next year? Jot them down here (can be individual words, phrases, or whole sentences)

1.

2.

3.

4.

5.

What Does Success Look Like?

Performance goals are at the heart of the performance review process. If you and your supervisor don't know what you're expected to achieve, then how can the two of you assess if you've achieved it?

"Bring me a rock!"

"No, I meant a smaller one"

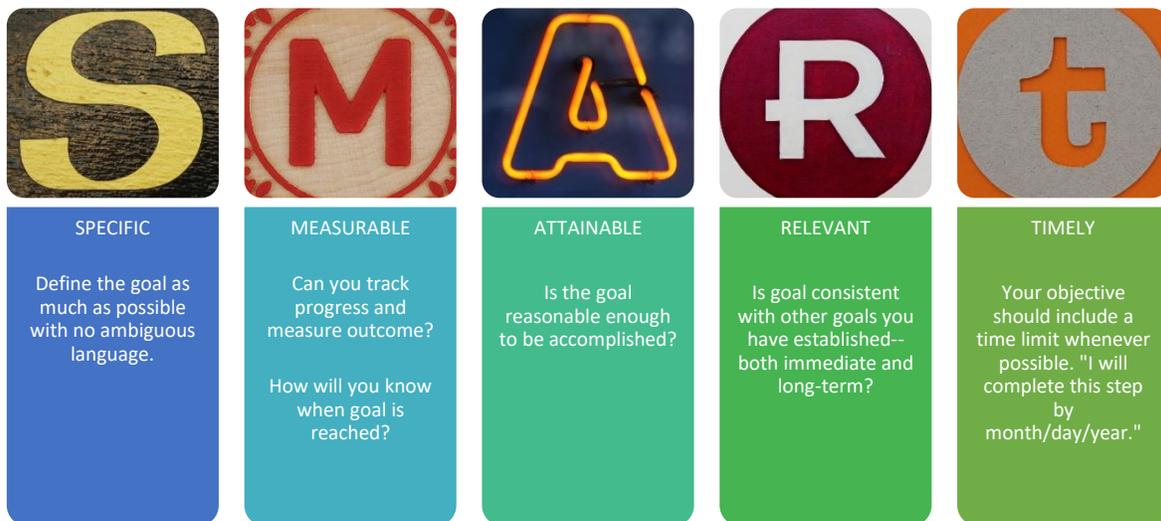
"No, I meant a different color"

"No, I meant a different shape"



Writing SMART Goals

S	Rewrite "Bring me a rock!" with this SMART goal in mind.
M	Rewrite "Bring me a rock!" with this SMART goal in mind.
A	Rewrite "Bring me a rock!" with this SMART goal in mind (Hint: What if you were in the desert? Would it be attainable then?)
R	Rewrite "Bring me a rock!" with this SMART goal in mind (Hint: Relate back to your Department/CWU Mission.)
T	Rewrite "Bring me a rock!" with this SMART goal in mind.



Examples of Well-written Performance Goals

Ongoing Goals

- Provide high quality customer service resulting in a 90% customer satisfaction rating on accuracy, timeliness and courtesy measures on an ongoing basis.
- Provide direction, support and oversight to the call center such that 95% of calls are answered within 1 minute and less than 2% of calls result in complaints.
- On an ongoing basis, reconcile the department financial reports by the 15th of every month with no increase in reconciliation errors.
- On an ongoing basis, dispatch 82% of high priority calls for police, fire and medical services within established timeframes.
- Resolve 90% of complaints through a collaborative process without need for formal mediation on an ongoing basis.
- Conduct education, monitoring and enforcement to ensure that 98% of agricultural and pest control businesses are in compliance with all regulatory requirements on an ongoing basis.
- Manage the department budget to stay within appropriations and accomplish 85% of service results by the end of the fiscal year.
- Coach and support my direct reports resulting in them reporting that I provided them with clear expectations, meaningful feedback and fair performance evaluations by the end of the fiscal year.

Special Project Goals

- Plan and oversee the office's relocation to the new facility such that the office and all systems are fully functional by September 30, 20XX.
- By January 1, 20XX, design and pilot a new outreach strategy using social media to increase by 25% the usage of our programs by our clients.
- By July 1, 20XX, develop and conduct a training program to support the transition to a new automated case management system with minimal effects on customer service such that all staff can accurately process 30 cases per day within 3 months of the training.
- By March 20XX, develop and implement a customer service plan that results in department staff reporting that they are clear about expectations for excellent customer service and have the skills and support to perform at that level.
- Develop a quality improvement process for the sanitary sewer system that reduces the failure rate to 1% by 12/31/XX.
- Create a partnership with at least 5 local cities to deliver two compliance related training workshops resulting in \$250,000 improvement in Net County Cost by 6/30/XX.
- By 11/30/XX, update the employee handbook to include a searchable intranet version that employees find easy to use and informative.
- Complete the Energy Watch Program to reduce countywide carbon emissions by 605 tons by the end of the fiscal year.

Examples of Well-written Development Goals

- By January 1, 20XX, complete an advanced Excel training course to upgrade my skills so I can prepare budget reconciliation reports with an analysis of trends and variances to help keep expenditures within budgeted limits.
- By June 30, 20XX, help develop and participate in cross-training for the office assistant team to learn procedures across all units so that all critical functions are covered during absences.
- By September 30, 20XX, chair the planning team for my professional association's annual conference to increase my communication and team leadership skills to prepare myself for greater management responsibilities.
- Develop and practice my coaching skills so that my direct reports report that they feel more satisfied with their work and able to perform at a higher level and such that I achieve a 30/70 split between coaching and doing by June 30, 20XX.
- By June 30, 20XX, complete course work and attain a CSAC credential to enhance my skills as an effective leader as measured by feedback from my supervisor and the accomplishment of my performance plan goals.

(Source: <http://hr.smcgov.org/>)

Practice writing SMART goals

Recommendation: 3-5 goals for the year, with one of them being a Development goal

Performance Goal

What is something your department/program will rely on you to accomplish at some point in the future (brainstormed on pg. 9)? Try writing it as a SMART goal below.

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Performance Goal

What is something your department/program will rely on you to accomplish at some point in the future (brainstormed on pg. 9)? Try writing it as a SMART goal below.

Development Goal

What is a skill you will work on to further develop at some point in the future (possibly brainstormed on pg. 9)? Try writing it as a SMART goal below.

ePerformance System in MyCWU

Your supervisor may prefer to write your goals after discussing with you, or they may prefer that you write them, or they may suggest the two of you work together to compose your goals for the new Performance Review Cycle. Likewise, your supervisor may have a preference regarding who enters your goals into your Performance Document.

To access your performance document, log into **MyCWU** and then follow this navigation:

[Employee] tab > ePerformance folder > Current Documents > then click the link for your **Performance Document** (choosing the one for the new cycle according to the Period Begin and Period End dates)

The screenshot shows the MyCWU Employee Dashboard. The top navigation bar includes 'Homepage', 'Student', 'Employee' (highlighted), and 'Faculty'. The left sidebar contains an 'Employee Dashboard' with a 'Navigation' menu listing: Benefits, Careers, Payroll, Personal, Policies & Procedures, Purchasing, and Report Time. Below this is an 'ePerformance' section with 'Current Documents' highlighted in yellow, along with 'Historical Documents' and 'Perf Mgmt Info'. The main content area is titled 'Current Performance Documents' and shows the user 'Dale Lonowski'. Below the title is a search bar and a table of performance documents. The table has the following data:

Document Type	Document Status	Period Begin	Period End	Job Title	Next Due Date	Manager
Performance Document	Define Criteria	11/01/2021	10/31/2022	Program Specialist 5	12/15/2021	Leah Valverde
Performance Document	Evaluation in Progress	11/01/2020	10/31/2021	Program Specialist 5	11/30/2021	Leah Valverde

A red box highlights the 'Period Begin' and 'Period End' columns for both rows. A blue arrow points to the 'Performance Document' link in the second row. The table also includes a search icon and a '1-2 of 2' pagination indicator.

Enter goals under the **|Goals|** tab:

Performance Document [Return to Current Documents](#) **Save**

Define Criteria - Update [Print](#) | [Notify](#) | [Export](#)

Dale Lonowski



Job Title Program Specialist 5

Document Type Performance Document

Template Performance Document 2021-2022

Status In Progress

Manager Leah Vaker...
Period 11/01/2021 - 10/31/2022

Document ID 6378

Due Date 12/15/2021

1. Add the performance criteria (goals and/or responsibilities) that you plan to accomplish during the performance period.
2. Once you have completed this step select the notify button to email your manager.

[Long Format](#)

Mission Objectives **Goals** Competencies Training

▼ **Section 3 - Employee Goals**

Employee Goals will be evaluated by: Employee, Manager

[Expand](#) | [Collapse](#) | [Add Goal](#) ←

▶ **Goal 1: Review and acknowledge position description.**