Requirements for Individual Goals

- Each performance cycle, the supervisor defines 3 to 5 individual goals for each employee.

- These goals are not intended to cover all aspects of employee work (institutional goals do that) but are meant to focus on 3 to 5 key deliverables for the current cycle.

- These goals are meant to be *dynamic* and reflect current priorities and strategic goals. It is expected that an employee would not necessarily have the all of the same individual goals from performance cycle to performance cycle.

- Below are some ways to think about developing individual goals.

Individual Goals by Scope: Goals may be shared across employees or unique to employees.

- ***Division-Wide Goals*** are generally tied to broader strategic goals or initiatives. For example, when PeopleSoft was implemented, all HR/Finance employees may have had a goal to achieve proficiency in the system by a certain date. The language of this kind of goal is usually consistent across employee types, but there may be small variations based on specific employee roles.

- ***Work-Unit / Job-Class Goals*** are similar but only apply to a specific work unit (generally, all the employees under one supervisor or supervisory team) or to employees performing a similar role. These may target specific initiatives defined for the work unit this performance cycle or target ways to improve/sustain work product or team dynamics.

- ***Employee-Specific Goals*** are unique to the duties/role of an employee. These also may include goals designed to provide a development opportunity to broaden/deepen the employee's skillset along with serving a business need (i.e., "stretch" goals). For example, a business analyst who hasn't yet served as a project lead could be assigned a project lead role in order for them to gain that experience and expertise.

Individual Goals by Function: Goals may be based on current/on-going work, short-term projects, or strategic initiatives.

- ***Critical-Function / "Deal-Breaker" Goals*** may be related to on-going key deliverables essential to successful performance in the position. These are often compliance-driven, such as an annual report to the legislature. Preferably, not every individual goal would fall in this category (to avoid goals becoming too static year-to-year).

- ***Project-Oriented / "Big Ticket" Goals*** may be time-specific to some on-going work (e.g., completing several new hires during the performance cycle or specific deliverables tied to a certain phase of a grant/research project). They may also be short-term projects that are only needed in the current cycle based on a business need (e.g., "clean-up" projects for recordkeeping/storage needs or efficiency gains).

- ***Forward-Focused / "Stretch" Goals*** are designed to move the employee's skillset and/or the unit's work product forward in some way. These are often aligned with strategic goals or development goals (i.e., what can this position do this year to get us closer to achieving the larger University strategic goals or to broaden/deepen the employee's skillset so that they can achieve more in their current position or the next?).

UNC System Strategic Goals

ACCESS
The UNC system must continue its proud heritage of access and student diversity.

AFFORDABILITY AND EFFICIENCY
Ensure a UNC education is within the financial means of all in the state.

STUDENT SUCCESS
Increase degree attainment and ensure value and relevance for students.

ECONOMIC IMPACT AND COMMUNITY ENGAGEMENT
Deepening partnerships that strengthen local communities and the state's economy.

EXCELLENT AND DIVERSE INSTITUTIONS
Help institutions achieve excellence within individual missions.

Mix-and-Match Types of Individual Goals

◆ There is no requirement about which kinds of goals must be used. Any of the above approaches is acceptable.

◆ Some organizations may choose, for example, to set one division-wide goal, one work-unit goal, and one employee-specific goal. Some may prefer to use project-oriented goals primarily.

◆ Ideally, at least one goal each performance cycle would clearly feed into the University's strategic plan. For example, any position could have a goal regarding efficiency, which would contribute to the University's plan. Certain work units already have established key deliverables that are aligned with the strategic plan.

Anatomy of an Individual Goal

◆ To write an individual goal, we recommend you use the following structure:

✓ Brief statement of the key deliverable …
✓ … The effect resulting from achieving that deliverable ...
✓ … The value that the effect has for the organization.
✓ Include additional specific deliverables (defined at the meeting expectation performance level).

GOAL: SOPS For Student Admissions Events

✓ Create SOPs for duties related to admissions and event planning …
✓ … in order to provide consistency, efficiency, and quality in our administration of these events …
✓ … so that we put a "best foot forward" in engaging and attracting top students to the Center.

✓ **Specific deliverables:**

▪ Meet with stakeholders involved in admissions process for MA program, determine roles in the process, and identify stress points in the efficient operation of the events (due May 30).

▪ Establish a short follow-up survey for students to gain feedback on the events for future planning (due June 30). Student ratings of the events should average no less than a 4.0 on a 5-point scale over the course of the year (showing satisfaction with the process and feeling engaged and positively toward the department). The average rating should either maintain or improve over the course of the first year.

▪ Develop concise and clear template emails/itineraries for students interviewing for admission, including checklists for critical points in student recruitment process and a list of vendors and key contact information used for recruitment events (due July 31).

▪ Develop flowchart that provides an overview of the admissions process and who in the Center participates at various points in the process (due July 31).

▪ Implement new procedures by September 1 so that survey data can be collected with each event through the fall and spring semesters.

Weighting Individual Goals (SHRA only)

◆ Employees must have no less than three individual goals and no more than five. Individual goals must total 50% of the final overall rating. Supervisors can determine how great a percentage they apply to each goal. Remember: Each goal must be weighted at least 5%.

◆ Peer supervisors of similar positions may discuss the appropriate weight of goals. Decisions on weighting can be based on the scope or complexity of a goal, the priority or criticality of the goal, the alignment of a goal with strategic priorities (compared to other goals), the time commitment for completing a goal, etc.