

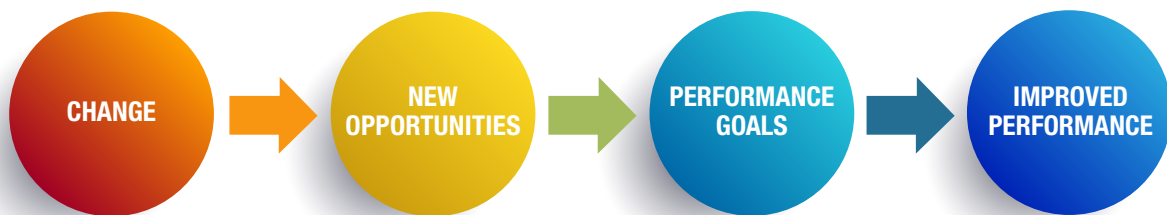
INTRODUCTION

Are you struggling to establish performance goals? You're not alone. It can be difficult to know what constitutes a good goal – one that is meaningful and drives performance. This document is intended to help step you through the goal setting process.

First, it's important to understand and accept that every position at UCI serves a purpose and contributes to the overall success of the organization. If it didn't, the position would not need to exist.

UCI staff perform duties that get the day-to-day work done, but that work changes over time. Sometimes the manager and employee institute a change in an effort to improve outcomes, e.g., faster service, lower cost, more streamlined process, technological improvements, training of others, etc., and sometimes external pressures force change upon the position, e.g., COVID-19, changes to UCI's strategic plan, UCPath, new regulations, changes to UCOP initiatives, etc.

It is the role and responsibility of the manager to guide employees through the process of identifying new business needs and/or opportunities, and to develop performance goals that result, over time, in improved performance for both the organization and employee. Developing and documenting performance goals ensures the employee and manager have a common understanding of what needs to be accomplished and the expectations the manager has regarding performance.



UNDERSTANDING PERFORMANCE GOALS – THE OBJECTIVE, RESULT(S), AND TIME FRAME METHOD

Performance goals do not have to be complex or lengthy, but they do need to contain the following elements to be effective: objective, results, time frame.

- **Objective** – What needs to change and who will benefit from the change(s)? It is a new target, new or updated service, or different behavior.
- **Result(s)** – What will have improved as a result of achieving the objective? These results should be measurable.
- **Time Frame** – By when should one see the outcome or behavior change? Performance goals could be short-term, long-term or somewhere in-between.

ALTERNATIVE METHOD – SMART GOALS

You can also use the SMART goal setting approach if you have a more complex goal with higher stakes.

S	<p>SPECIFIC</p> <p>Well defined and understandable to anyone that has a basic knowledge of the goal (maximum 200 characters)</p>	
M	<p>MEASURABLE</p> <p>Have clear performance metrics that will be used to determine when the goal is complete and what success looks like (maximum 200 characters)</p>	
A	<p>ATTAINABLE</p> <p>Is achievable within the availability of resources, knowledge and time (maximum 200 characters)</p>	
R	<p>RELEVANT</p> <p>Is worthwhile, timely and aligns with other efforts/needs (maximum 200 characters)</p>	
T	<p>TIME-BOUND</p> <p>A goal due date is required and should be determined based on an achievable length of time needed to accomplish it (maximum 200 characters)</p>	

A STEP-BY-STEP PROCESS FOR CREATING PERFORMANCE GOALS

Use the following questions to help identify new opportunities or business needs that could be the focus of your performance goals. Answering these questions will guide you in answering the Objective(s), Result(s) and Time Frame(s) of your performance goal(s).

1. Take a few minutes to think about the purpose of your role.

- What are my responsibilities?
- What services or outputs do I produce?
- Who benefits from my services or outputs (colleagues, manager, clients) and how do they use them?
- How frequently do I offer those services/outputs?
- What has recently changed in my role (responsibilities, services, clients, etc.), team (leader or team changes), and department (new goals/targets)?

2. Now, think about the recent changes you described above. What will you need to do differently to account for the change?

- What responsibilities/services/outputs do I need to add or eliminate?
- What improvements do I need to make to my existing services/outputs/behaviors? Consider quality, timeliness, scale, frequency, and cost.
- If I make these improvements, how will my clients benefit? How will I benefit?
- When could I have these improvements ready?
- How long will I need to offer these improvements?

EXAMPLES OF PERFORMANCE GOALS

1. Reduce total expenses by \$10,000 by fiscal close on June 30, 2020. Review budget activity on a bi-weekly basis, report trends, make necessary recommendations to Finance Manager, and execute approved recommendations.

2. Work with administration and student coordinators over the next nine months to design and implement SPOP (Student Parent Orientation Program) for the start of the upcoming academic year. Once implemented and the program is completed, work with student coordinators on their learning outcomes and growth over the past year to identify ways to improve for the 2020/21 academic year.
3. As subject matter expert for XXX (i.e., budget, contracts/grants, human resources, etc.) for all units in the school/division, handle the increasing volume of requests faster with little to no impact to service quality for the next six months.
4. Increase funding revenue for XYZ through new online program sources by 5% by June 30, 2020.
5. Implement a new productivity software tool by March 30, 2021. Evaluate and select software by June 30, 2020. Conduct pilot by December 31, 2020.
6. Upgrade on-premises Exchange infrastructure from version 2010 to version 2016 by December 21, 2017.
7. Implement at least one process improvement idea that I share at each monthly staff meeting.
8. Create reports for department leaders to use during their monthly operational review meeting. Include elements to assist with data analysis like charts, graphs, and pivot tables. Complete the final version in time for the annual budget meeting.