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Goal Setting

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Why Set Goals?

- To provide clarity of purpose
- To increase productivity and achievement
- To increase employee engagement and motivation
- To lay the groundwork for accountability and recognition
- To unify the team, unit, and organization
- To increase organizational efficiency
- To help the organization better handle complexity
- To accelerate execution of the organizational strategic plan

Types of Goals

- Individual
- Team
- Unit
- Organizational
- Growth & professional development
- Short & long-term
- Outcome oriented & process oriented
- Strategic, Tactical & Operational



Strategic, Tactical, Operational Goals

Strategic

- Set by senior leaders
- What the organization wants to accomplish to better realize its mission and vision
- Spans the next 1-5 years

Tactical

- Set by middle managers (deans/chairs)
- What the unit will do to support the strategic goals of the organization
- Spans the next 6 – 24 months

Operational

- Set by employees in collaboration with their direct supervisor
- Specific, practical tasks the employee needs to do to help achieve tactical goals
- Spans the next week – 1 year

Percipion Course: Aligning Unit Goals and Imperatives

<https://umsystem.percipio.com/courses/24f1a7a6-e4b1-11e6-a792-0242c0a80b09/videos/24f1ceb1-e4b1-11e6-a792-0242c0a80b09>



Suggested Goal Setting Process

- Start with the organizational mission, vision, and values
- Review the strategic plan
- Determine which parts of the strategic plan are relevant to your unit
- Set unit level goals based on the strategic plan
- Set team goals based on unit goals
- Set individual goals based on team goals



UMSL Mission & Vision

Mission: We transform lives

Vision:

- Be a beacon of hope, a force for good, and a leader in the pursuit of excellence in education, impactful research and community service.
- Boldly assert that education is for everyone willing and able to seek it out
- Search for knowledge, progress, and positive change for ourselves, our community, and our world

Organizational Values

- Trust
- Inclusion
- Innovation
- Access
- Success
- Engagement



UMSL Strategic Planning

- Senior leaders are in the processes of drafting a new strategic plan
- Pillars of the new strategic plan (draft)
 - Build a robust campus community
 - Elevate recruitment and retention
 - Shape the workforce of the future
 - Generate new knowledge
 - Advance St. Louis as an Anchor Institution
 - Develop stewardship and vitality
- The new strategic plan is expected in the beginning of 2024
- In the meantime, keep goal setting!
- When the new strategic plan comes out, review your goals and adjust



Unit & Team Goals

- Review your unit's and team's goals and consider where you and your work fit into those larger goals
- If you aren't clear on what those are, then ask
- If they don't exist, request that they be created
- If they're not created, keep goal setting anyway!

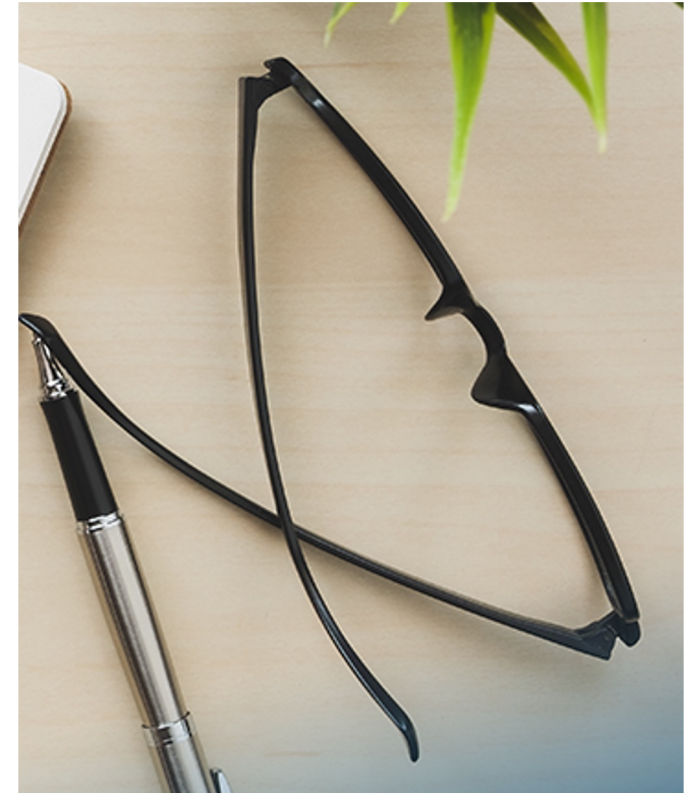
Individual Goals

- Review your job description and job expectations
- Review your most recent performance evaluation
- Draft SMART goals
 - Specific
 - Measurable
 - Action Oriented & Attainable
 - Relevant
 - Time Bound
- Share the goals you've drafted with your supervisor and ask for input

Specific

- Clear, precise, detailed
- States exactly what needs to be done for the goal to be deemed achieved
- Includes not only a “what” but also a “how”

Example:



Communicate more effectively	→	I will block off 30 minutes on my calendar at the beginning and end of each workday to focus on my inbox so I am able to maintain a 24-hour response time to emails
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Measurable

- States how progress and success will be measured
- Uses metrics and/or milestones



Examples of metrics

Time to completion

Cost of completion

Return on Investment

Retention/Attrition

Customer satisfaction

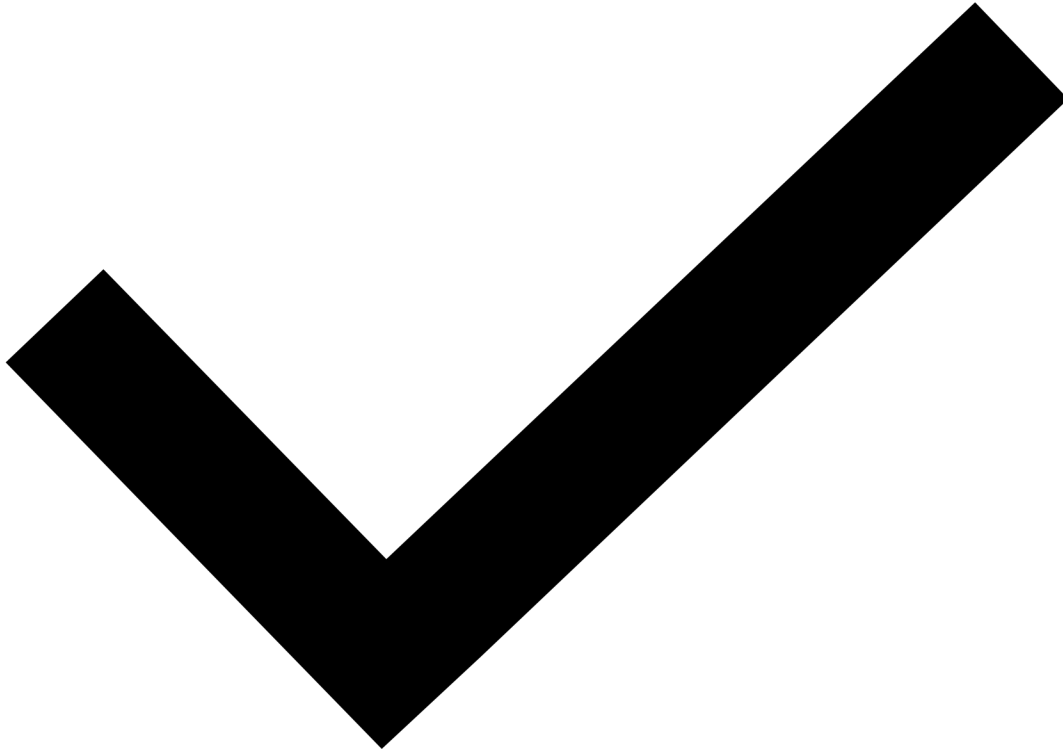
Activity completed (ie. # of recruitment calls made)

Productivity: ratio of work product output to time/resource input (ie. process 15, I-9 recertifications per day)

Gross Margin: Revenue generated – cost of project

Error Rate

Action Oriented & Achievable



Achievable:

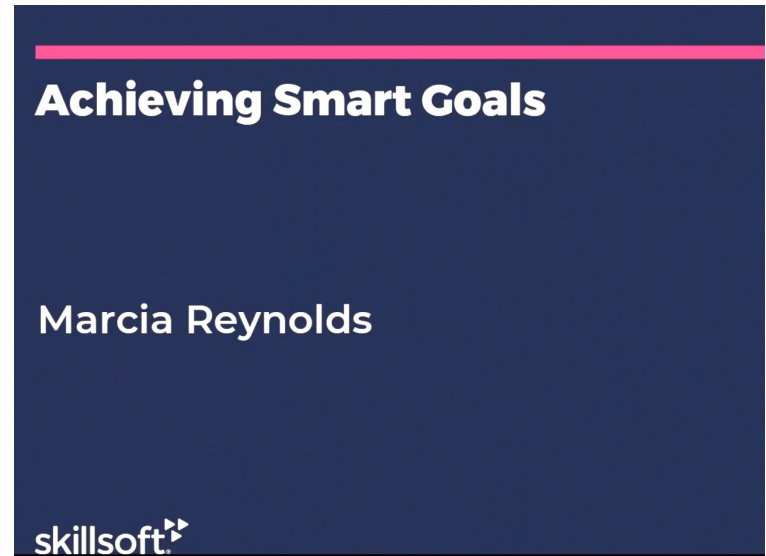
Attainable by the average employee in that role or position

Action Oriented:

More than just what needs to be achieved, but what to DO to achieve it, what steps to take

Relevant

- The goal, task, or skill is pertinent to the job description/expectations
- The goal has meaning to the employee, team, unit, and organization
 - What motivates the employee?
 - How does it help the supervisor?
 - How does it fit with the organization's strategic plan?
- The “Why” behind the goal is communicated



Example from Percipio Course

<https://umsystem.percipio.com/videos/271ebd54-05cd-11e7-b6c3-0242c0a80802>

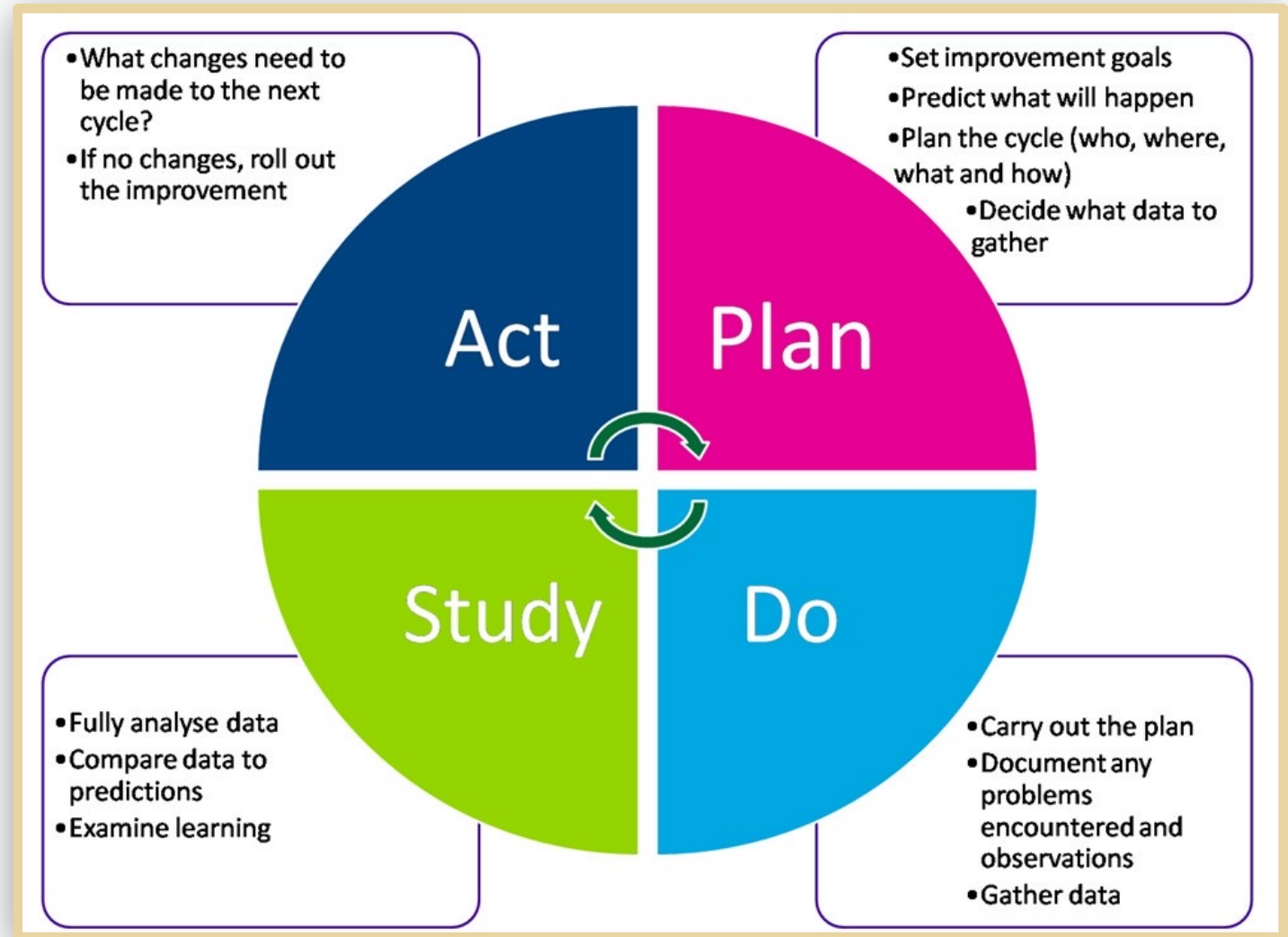
Timely & Time Bound

- Something you can start right now or in this goal cycle
- Has an end date, deadline, or measuring date
- Prescribes a suitable time frame to complete the task



Follow-Up

- Set a calendar reminder for the measuring date
- For longer-term goals, set regular, periodic check-in dates to track progress
- Remember to complete the rest of the PDSA wheel



Workshop

How could you make this goal S.M.A.R.T.er?

1. Develop a more robust new employee onboarding program
2. Improve communication
3. Be more active

S	Specific Clearly State your Goal
M	Measurable Ensure you can Measure Success
A	Attainable Set Goals you know you can Achieve
R	Relevant Set Goals Relevant to your Career or Education
T	Time-Based Set a Deadline for Completion

Sample Goals

Secretary:

I will take an Excel course in Percipio by the end of the fall semester to increase my efficiency in creating weekly updates on budget expenditures.

Custodian:

By the end of the year, I will create a detailed weekly cleaning schedule that ensures all areas under my responsibility are kept clean and meet established guidelines for health and safety.

Wrap Up

Questions & Key Takeaways

Please scan the QR
code to the right or go
to www.menti.com
and enter voting code:
1213 9242



Up Next in This Series

Annual Enrollment

Thursday, October 12 at 1pm CT

***Location: In-Person, meeting space TBD based on registration

The Annual Enrollment period for benefit-eligible faculty and staff runs from Oct. 23 – Nov. 3, 2023. Just like it is important to get your health checked annually, the same annual “benefit check-up” is important to help you make choices that support you and your family in the coming year. Join this info session for information on 2024’s insurance options and other benefits available to you!