Arts & Letters Goal Setting

Setting goals is the first step in turning the invisible into the visible.
-   Tony Robbins

Process Overview

Goal Setting (Aug - Sept)

Performance Review (March - May)

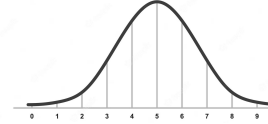| Employee Sets Goals & Expectations	Supervisor approves	Year-End Assessment	Calibration Meetings	Performance Review
Set clear expectations in the beginning of the (Fiscal)Year on objectives Clarify and help understand what exceptional performance looks like	Employee and manager to understand and agree on what the employee is expected to accomplish over the course of the fiscal/academic year Discuss and agree on what development activities the employee will pursue	Employee Self Assessment Supervisor Assessment Assessments based on expectations, goals and development plan	Supervisor and/or Chair participate in calibration meetings	Supervisor meets with Employees and finalizes rating in Endeavor

Defining Expectations and Goals
- Set clear expectations in the beginning of the (Fiscal)Year on objectives
- Clarify and help understand what exceptional performance looks like

We are here

Ongoing Coaching and Feedback
- Provide timely, ongoing feedback
- Review goals throughout the year and add / drop goals or re-prioritize if needed

Assessing & Rewarding performance
- Hold ourselves and others accountable for our results and performance
- Reward the right behaviors and outcomes

Roles and Responsibilities

Supervisor:
- Understanding the employees aspirations and career goals
- Provide clear direction, intent, and priorities
- Ongoing coaching delivering precise, timely, ongoing feedback
- Provide support and remove barriers
- Prioritize the team well being and support at all times

Employee:
- Insist on clear objectives and goals
- Ask for prioritization
- Ask for feedback and support when needed
- Provide feedback to your leader
- Make time for regular 1:1 touch base meetings

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1 Department Related

Objectives related to department's goals and plans, strategic projects and end results
Ex: Create a process for scheduling events in the Malloy Chapel (such as celebrants and sacristans) to create a more seamless experience for the user by February 2023.

2 Functional Performance

Objectives related to a functional part of your position
Ex: Learn Emma so I can assist in creating communication emails

3 Learning

Objectives related to continuous improvement, talent and succession planning etc.
Ex: In the spirit of *Study Everything, Do anything*: Participate in 4 of the "Time Out for Tech" Clases within OIT.

4 My Leadership

Objectives related to manager development and leading others
Ex: To strengthen management skills, attend Better Conversations Everyday by January 2024.

5 Culture

Focused on enhancing the A&L Culture
Ex: Submit a WOW form once a month for a colleague.
Ex: Attend Peer Group Discussions to build relationships across the College.

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S G — Specific

Goals should be defined and clear it should answer:

WHAT do you want to do

and

HOW are you going to do that?

M O — Measurable

Results should be reflected in **data** and **facts** that can be tracked

Allow to record progress and completion

Ability to measure will allow for **specific feedback** and **accountability**

A A — Achievable

Goals should be stretch goals but attainable objectives should **challenge** and **stretch** you while being attainable.

Ensure that the steps to get there are **in your control**

R L — Realistic & Relevant

Goals should be relevant to you and your organization

They should meet the **need** of the **organization** and **role** you are in as well as **your own** needs. I

T S — Time-bound

Goals should include a time limit or date you are working towards

A **date** helps us to stay focused, motivated, and gives us a **deadline**

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NOT SPECIFIC:
Streamline postdoc process

BETTER:
Review the current postdoc hiring process and prioritize the recommendations from the Graduate Coordinator Peer Group and develop a work plan by October 31, 2023. Start implementing the new process by March 2024.

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NOT Measurable:
Create a plan for emeriti office space.

BETTER:
Establish and communicate an A&L Emeriti policy that addresses where new emeriti office space is located, provides an overview of what emeriti should expect from the college and eliminates the need for an emeriti request process by December 2023.

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NOT Achievable:
Implement an A&L intranet by Mid August with a 100% user rate.

BETTER:
Create phased implementation plan for the Arts & Letters intranet beginning early August and identify population for a phased roll out approach.

Phase 1 rollout mid August with full implementation done by Oct. 15, 2023 achieving a 60% usage rate in staff.

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NOT Realistic / relevant:
Improve ALCO office space to accommodate better workflow and dedicated areas for service teams by August 15, 2023.

BETTER:
Improve ALCO office space to accommodate both service teams by end of FY 2025 by executing the following:
- Implement a temporary change allowing service teams to sit together and creating a better welcome space by August 2023.
- Obtain recommendations from FDO and Business Furnishings consultant by November 2023.
- Develop a layout plan and outline scope of work by January 2024.
- Complete work and implement plan by November 2024.

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NOT time-bound
Revamp the calendar for Music & Sacred Music
events/productions

BETTER:
- Review current calendar process and determine what
  content needs to be changed or added by October 2023.
- Create a new process by the end of November 2023.
- Communicate and implement the new calendar process
  by January 15, 2024.

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eNDeavor Process

Step 1: Employee Records Expectations

Step 2: Manager Approves Expectations

Step 3: Employee Self Assessment

Step 4: Manager Evaluation

Step 5: Employee Signs Off

Due Sept 29

Employee Records Expectations

The employee and supervisor meet to discuss and establish the employee's expectations

Understand and agree on what the employee is expected to accomplish over the course of the fiscal/academic year
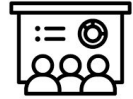
What development activities the employee will pursue.

Enter expectations in the first quarter of the fiscal year.

Due Oct 16

Manager Approves Expectations

Once the employee enters expectations, the manager reviews and approves them.

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Next steps

	WHAT	WHEN
Attend Goal Setting Training	• Attend goal setting training	August
Finalize Goals	• Sit down with your manager and define your 2023 goals. • Enter goals into endeavor • Managers approve objectives in endeavor by Oct. 16	Sept 29 (Mgr: Oct 16)
Review progress throughout the year	• Review your progress regularly with your manager • Re-Prioritize goals if needed • Track and capture progress throughout the year	ongoing

Frequently Asked Questions

Q: If goals are supposed to be reviewed and adjusted throughout the year how can we do that in endeavor?
A: There are many ways that we can track our goals and progress towards the goals outside from Endeavor. Endeavor is the system of record but does not need to be the system for work. A simple google sheet or the template provided can be your system of work. If you want to adjust a goal in endeavor, the manager can send the form back to the employee anytime and the employee can make adjustments and the manager will then approve those adjustments accordingly.

Q: My goals changed throughout the year - What should I do?
A: As long as discussed with your manager you will be able to add new goals and adjust your goals. Especially if you are changing roles throughout the year it is expected that you add new goals and close out former goals from the prior role. Make sure you are talking to your manager before changing any goals.

Q: Who sets my goals?
A: You will work on your goals together with you manager. Setting goals should be a team effort between you and your manager.

Q: What if I disagree with my goals?
A: Goals should be set together, you are just the same responsible for your goals as you manager. If you disagree with your goals, meet with your manager to discuss changes or talk about re-prioritization of the goals. You can also always reach out to your Director of Operations, Ashley Zingo.

Frequently Asked Questions (cont'd)

Q: How can I make sure that my goals set me up for a high rating?
A: Unfortunately, there is not a guarantee for a certain rating when setting up your goals for the year. However, setting and executing challenging, stretch goals will certainly get you closer.

Q: How many goals should I put into endeavor?
A: There is no absolute number of goals that you should be putting into endeavor. However, all Arts and Letters employees should have at least three goals. If you feel that you have too many goals, meet with your manager and ask to prioritize the most important goals.

Q: What should I put in and what shouldn't I put into the system?
A: You should put challenging, realistic stretch goals into endeavor that you are actively working on. Avoid putting every day job tasks in the endeavor. You want to record what will set you apart and support your achievements throughout the year.

Q: Should I put everyday job responsibilities in as my goals?
A: While you can put every day job responsibilities into the goals, it shouldn't be the only ones. If you put every day tasks in the goals they should be specific, timebound, and measurable. Furthermore, they should show an improvement over last year, improving a process, reducing waste, decreasing response rates, increasing quality of work and output, improved internal customer feedback etc. Remember, true change and growth happens when we are at the end of the comfort zone.

Resources

The Office of Human Resources Knowledge Hub has provided some useful information for how to get started:

1. Endeavor Overview
2. Recording expectations in Endeavor
3. Notre Dame's Performance Review Process