



for staff

Goal-Setting Essentials

Performance Excellence Job Aid

This job aid provides a step-by-step SIMPLE goal-setting process for staff. Use this to draft your goals in advance of a meeting with your supervisor, or in response to input from your supervisor on priorities for the year. When goals have been confirmed, enter them in your review in myHR Learn.

It will take approximately 20-30 minutes to work through this job aid, and the goals you create will streamline and focus your work for the entire performance year to come. Here are the steps:



Clarify Purpose

The most powerful planning starts with a question:

“What value am I creating in my role, and for whom?”

While we do not currently document purpose statements in Performance Excellence, they provide a foundation for goal-setting. You can think of purpose as your mission statement in your current role, providing clarity and inspiration as you set goals. Purpose does not typically change dramatically from year-to-year unless your role or the work of your unit changes. Avoid the temptation to think of purpose in terms of what you do. Purpose is about impact on others.

To articulate your role’s purpose, answer the following questions:

- What do I do?
- Who do I do it for?
- How do they benefit as a result?

Using these questions as a guide, draft your purpose statement (for sample purpose statements, see the Purpose and Goal Library at perform.northwestern.edu).

Learn Team Objectives

Find out what your team, unit, group, or department is trying to achieve this year. What outcomes will define success for everyone? If this information has been shared, make sure it is front and center as you work on your goals. If you are unclear about team objectives, it is recommended that you ask for clarity either before you draft your goals.

- E.g. “I am working on my goals for the year, and wondered if you could share our team/area objectives so I can make sure I’m focused on things that are highest priority?”

If you've already drafted your goals, and want to confirm you're focusing on the right outcomes, you might ask a different question:

- "I've drafted my performance goals for the year. Can we look at them together so I can get your input on whether or not they're aligned with what's highest priority for us?"

From Activities to Goals

Set 2-4 goals for the year. You may be thinking "how can I limit myself to 2-4 goals, when I have so much to do?" Many times, this challenge comes from confusing *activities* or *tasks* with *goals*. How to tell them apart?

A Task is something to be done. Tasks are a part of workflow or job responsibilities. A set of tasks/activities might achieve a goal, but tasks aren't goals.

A Goal articulates a result. It describes something you have achieved through your efforts.

To sort them out, first write your high-level responsibilities or activities in the left hand column (this could come from your job description). Then, write what that activity helps you achieve in the right hand column.

| What I do in my role | What result does this help me achieve? |
|--|--|
| 1. <i>Example: communicate regularly with prospective donors</i> | <i>Stronger relationships with prospective donors, and increased giving.</i> |
| 2. | |
| 3. | |
| 4. | |
| 5. | |
| 6. | |
| 7. | |

Group and Prioritize

Look over your work to see where *different* activities lead to *similar* outcomes. What are the big outcomes you want to achieve? Group tasks or activities together into similar outcomes.

Which of these are highest priority for your area? Which are most meaningful or valuable? Answer these questions, and you will be ready to draft your SIMple goals.

Draft SIMple Goals

Northwestern uses the SIMple framework as a guide to setting goals. It is similar to SMART goals (Specific, Measureable, Actionable, Relevant and Time-bound). What makes a SIMple goal different from a SMART goal is that it includes personal meaning and motivation.

- S = **Specific** or objectively measurable.
- I = **Important** or aligned with your area's goals.
- M = **Meaningful**, motivating or fulfilling to you.

Using your work from the "Group and Prioritize" section above, pick two or three outcomes you want to turn into goals. Use this formula to get started drafting your goals, including the three elements of SIMple goal-setting (feel free to change language to make it more natural):

I want to achieve _____, and will know I've

(Important)

Succeeded when I can measure _____. This is a valuable

(Specific)

part of my work here because _____.

(Meaningful)

When you've drafted your goals, share them with your supervisor for refinement and confirmation. Then enter them in your review in myHR Learn. For sample goals, see the Purpose and Goal Library at perform.northwestern.edu

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Help: For policy and process questions, contact your unit's HR Administrator.
For technical support: 847-491-4357 (1-HELP) or consultant@northwestern.edu