HOW TO SET PERFORMANCE OBJECTIVES

Each individual is responsible for setting *at least three objectives* for the year. These objectives should be directly related to the Department/Faculty Objectives, KPI’s (Key Performance Indicators) or Project Team Objectives. At the end of the year these objectives will form the basis of your performance results.

It is important to ensure that objectives are not simply day-to-day activities that are a “given” within your job description. Objectives should be:

- Incremental projects, responsibilities or actions that support key operational initiatives
- Linked to strategic goals
- Integrated with department/division objectives
- Provide a clear opportunity to recognize and reward
- Have “high-impact” - i.e. ADDS VALUE
- Have specific outcomes/results that represent meaningful progress in improving processes, creating efficiencies, improving customer service

*How do performance objectives differ from development plans?*

Whereas performance objectives support organizational goals and performance objectives; development plans support the growth and development of the individual for success in their current role and to prepare them for future positions.

Therefore, a performance objective should not simply be to attend a workshop or take a course. However, where acquiring a new skill or competency (i.e. project management, excel, HTML programming, etc.) is required to successfully meet the performance objective this may be included as part of the action plan.

Please keep in mind the most effective development plans are directly tied to a performance objective allowing an opportunity to practically apply new skill/ knowledge areas.
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SMART Objectives
Objectives should follow the S-M-A-R-T criteria:

Specific
To the point and behavioral in nature

Measurable
Characteristics that will define successful achievement

Attainable
Possible to attain. But a stretch. “Just out of reach, but not out of sight”

Relevant
Truly worth taking on; it is of value

Time Bound
A clearly identified time element.

Questions to Ask- Is this objective “SMART”?

<table>
<thead>
<tr>
<th>CRITERIA</th>
<th>QUESTIONS YOU CAN ASK YOURSELF</th>
</tr>
</thead>
<tbody>
<tr>
<td>S Specific</td>
<td>What are the specific details of what is to be achieved and how it will be achieved (action plan)? What is the desired result? What will the customer experience? Does the objective include an “object”? an “active verb”?</td>
</tr>
<tr>
<td>M Measurable</td>
<td>What are the quantifiable, concrete results that will evaluate whether or not the objective has been met? Have I clearly defined what the overall benefit will be?</td>
</tr>
<tr>
<td>A Attainable</td>
<td>Are the necessary tools, information, and other resources available to enable me to meet this objective? Are new skills/knowledge required?</td>
</tr>
<tr>
<td>R Relevant</td>
<td>What is the value-added impact to McMaster/customers/department/colleagues/other key stakeholders in achieving this objective?</td>
</tr>
<tr>
<td>T Time Bound</td>
<td>Are the due dates clear to everyone involved? Does the time element allow/facilitate measurement of ongoing progress?</td>
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</tbody>
</table>
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Be ‘SMART’ about Your SMART OBJECTIVES

- Monitor progress throughout the year. Will the objective be completed within allotted timeframe? (T – Time Bound criteria).
- Recognize if new/special efforts must be made or additional resources are needed.
- Address unexpected challenges when they occur i.e. resourcing issues, legislative changes, etc. (A – Attainable criteria)
- How important is it to maintain the measurable targets (i.e. budget, time) that were initially set if additional criteria, action items are now required? Will quality be compromised? (M – Measurable criteria)

Constructing Your Objectives

<table>
<thead>
<tr>
<th>Performance Objectives</th>
<th>Action Plan</th>
<th>Measures of Success</th>
<th>Actual Results</th>
</tr>
</thead>
<tbody>
<tr>
<td>THE “WHAT”</td>
<td>“THE HOW”</td>
<td>“MEASURE/WHEN”</td>
<td>What was actually achieved?</td>
</tr>
<tr>
<td>Clearly outline what you are trying to accomplish with your objective.</td>
<td>Focuses on the plan or strategy you will use to reach your goal; i.e. create a new process, solicit customer feedback, review new requirements, etc.</td>
<td>The measure of success is what you will use to track progress- what does success look like?</td>
<td></td>
</tr>
<tr>
<td>Use action-oriented words. Describe what you are trying to achieve</td>
<td>A detailed action plan helps you to manage progress.</td>
<td>When will the goal be accomplished?</td>
<td></td>
</tr>
</tbody>
</table>

Types of Measurements:

Quality - i.e. increased customer/student satisfaction, response time decreased by 20%.

Quantity - is represented by a number- i.e. process 50 more new hires per pay.

Cost - represented by currency or percentage (i.e. reduces administrative costs by 10%)

Timeliness - represented by a number, day, month, time of day; i.e. schedules, deadlines
HOW TO SET PERFORMANCE OBJECTIVES

Process of Defining Objectives

Review all applicable department/faculty objectives, KPI’s and project team objectives to understand overall strategic direction to ensure objectives are aligned and support the overall success of the University.

Step 1: Goal Statement
Clearly outline what you are trying to accomplish with your objective. Use action-oriented words. Describe what you are trying to achieve.

Step 2: Action Plan
Outline the key action steps that you will need to undertake to contribute to the success of your objective. Be specific. Define clear timelines against each action item. These action items need to be easily measured, as they will be the basis for measuring your performance. Think of measurement in terms of timing, quantity, cost, or quality.

Step 3: Measurements of Success
In an effort to make measuring the success of your achievements relatively easy and painless, you and your Manager will define these measures at the start of the year. In this section you are able to define what exceeding expectations or falling below expectations

Example

<table>
<thead>
<tr>
<th>Performance Objective(s)</th>
<th>Action Plan</th>
<th>Measures of Success</th>
</tr>
</thead>
<tbody>
<tr>
<td>Strengthen employee retention by improving the new hire “experience” and engaging new hires through employee orientation process</td>
<td>Create resources and tools (SOPs) to assist new hires.</td>
<td>% Decrease in regrettable turnover</td>
</tr>
<tr>
<td></td>
<td>Develop new hire checklist for supervisors</td>
<td>New Hire 6 month survey conducted with % return rate and % overall satisfaction</td>
</tr>
<tr>
<td></td>
<td>Develop a departmental New Employee Welcome Program</td>
<td>Positive feedback from supervisors</td>
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Additional Resources:

The performance review tools are available for on the Total Rewards webpage:

Giving Feedback to Subordinates, CCL Press, 1999
Raoul J. Buron and Dana McDonald-Mann
This guidebook tells you how to give your subordinates effective feedback so they can work more effectively, develop new skills, and grow professionally

DK Essential Managers: Coaching Successfully
John P. Eaton, Roy Johnson, Robert Heller
Find out how to adapt your coaching style to suit both teams and individuals, how to use delegation as a coaching tool, and how to overcome negative attitudes. Power tips help you to handle real-life situations and increase your effectiveness as a role model and confidant.
http://us.dk.com/nf/Book/BookDisplay/0,,9780789471475,00.html