



Establishing Goals for Performance Plans

Using the SMART Goals method to establish goals that make sense!

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What are SMART Goals and Why Use Them?

SMART Goals provide a framework designed to help you set clear and actionable objectives.

By using a series of 5 benchmarks that comprise the SMART Goal Method, you will be able to create concise goals that are clear, attainable, and meaningful.

Having clarity in your goal-setting provides the motivation and focus your employee needs to be successful.

What are the 5 Benchmarks of SMART Goals?

S	Specific	Make your goal specific and narrow for more effective planning	
M	Measurable	Make sure your goal and progress are measurable	
A	Achievable	Make sure you can reasonably accomplish your goal within a certain time frame	
R	Relevant	Your goal should align with your values and long-term objectives	
T	Time-based	Set a realistic but ambitious end date to clarify task prioritization and increase motivation	

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1. Specific

The goal should be clear and specific.

When drafting the goal, try to answer “W” questions:

- What do they need to accomplish?
- Why is the goal important?
- What actions will they need to take?
- What resources or limitations are involved?

2. Measurable

It is important to have measurable goals that allow for the tracking of progress. Being able to track progress helps the employee stay motivated, meet their deadlines, and feel the excitement of getting closer to achievement.

Establishing measurable goals allows for the supervisor to measure an employee's success and pick the appropriate rating, while providing supporting documentation/evidence to support the rating given.

A measurable goal should address questions such as:

- How much/many?
- What data will be used to decide whether they have met the goal?
- How will they know when the goal is met?

3. Achievable

The goal also needs to be realistic and attainable. While the goal should stretch their abilities and allow for professional growth, it must still remain possible to achieve.

An achievable goal will usually answer:

- How can they accomplish the goal?

For example:

- Do they have time to complete the required training effectively?
- Are the necessary resources available to them?
- Do they have the necessary skills?

4. Relevant

A relevant goal will directly contribute to successful results. It is important that the goal is relevant to the position and to the success of the department.

A relevant goal can answer “yes” to these questions:

- Is it worthwhile?
- Is it the right time?
- Does it align with other efforts?
- Are they the right person to reach the goal?
- Is it applicable to the position/department?

5. Time-Based

Every goal needs a target date. This part of the SMART goal method prevents everyday tasks from taking priority over longer-term goals. This also ensures that supervisors are setting goals that are attainable during the duration of the performance cycle. The time provided to achieve the goal should be realistic and allow plenty of opportunity to adjust, where needed.

A time-based goal will usually answer these questions:

- When is the deadline?
- What can I do six months from now?
- What can I do six weeks from now?
- What can I do today?

Example:

Vague Goal: Help the department stay on budget this year.

SMART Goal: Each month, distribute a budget report that shows our department's current expenses in comparison to our allotted annual budget and highlight areas where we are overspending. Based on our current spending, offer suggestions on how to cut expenses so that we are back within budget.

Expectation for Performance Planning and Appraisals



Both the policy for SHRA and EPS employees require that the supervisor meet with the employee for the purpose of performance planning. This discussion should ensure that the employee understands their new or recurring goals, expectations, and measures. Supervisors should discuss the specific expectations for goals, objectives, and professional development activities for the upcoming cycle.

Both policies also require that the supervisor meet with the employee to discuss the annual appraisal. Supervisors should discuss with the employee their annual performance and their overall rating.

Expectation for Performance Planning and Appraisals Continued...

The process for both the Performance Plan and the Annual Appraisal is not considered complete until the employee signs the document, after the meeting(s) have taken place. Their signature serves as an acknowledgement that they received the information.

Note: The information discussed regarding performance, should be kept confidential between the employee and their respective leadership.

Conclusion

While every goal may not fit all 5 benchmarks of the SMART Goal Method, the framework allows the supervisor to apply meaningful goals that can be measured, for the purpose of giving an overall rating that they can support.

This also ensures that the employee has been tasked with working towards specific goals that are realistically attainable and related to their position's overall objectives.

For Further Information

SHRA Performance Policy: [SHRA-Performance-Appraisal-Policy.pdf](#)

EPS Performance Policy: [300.2.18\[R\]](#)

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