Writing SMARTer Expectations
Workshop Outcomes

- Write 1-3 Expectations that meet SMART criteria.
- Create one Development Activity and Plan.
- Determine what data to collect to confirm achievement (and where to document it!).
Expectation: What & Why?

WHAT?
A written statement that clearly describes tasks or actions with measurable results.

WHY?
Expectations clarify what needs to be done.

BENEFITS?
- 
- 
- 
-
WHERE to Start?!?

Top Down?

Bottom Up?
University Goals

- Ensure that our Catholic Character informs all our endeavors.

- Offer an unsurpassed undergraduate education that nurtures the formation of mind, body and spirit.

- Advance human understanding through scholarship, research, and post-baccalaureate programs that seek to heal, unify, and enlighten.

- Foster the University’s mission through superb stewardship of its human, physical, and financial resources.

- Engage in external collaborations that extend and deepen Notre Dame’s impact.
Vision, Mission and Goal Alignment

University Goals and Values

Goal 1
Goal 2
Goal 3
Goal 4
Goal 5

Division Goals

Departmental Goals

Individual Expectations & Development Plan
WHERE/HOW to begin!?!
Sources of Goals

Department Goals
• Your role’s contribution

Key Areas of Responsibility
• New project, problem, process
• Routine/maintenance activities

SMART Expectations
STEPS to Setting Expectations

- Confirm Priorities: Quality, Quantity, Job Knowledge, Others???
- Review, Revise, Prioritize
- SMART Expectation

Pre-Step: KARs
Key Areas of Responsibility

1. Review **Position Description** OR list your three to five (3-5) primary areas of responsibility.

2. For each **KAR**, identify:
   a) Routine/maintenance activity(s)
   b) Additional task(s)
   c) Problem to solve or Process to improve

3. For each **Department Goal**, determine how your work contributes to it. Identify:
   a) actions you should take to contribute to its attainment.
Worksheet

- **Key Areas of Responsibility (5-7)**
  - New project, problem, process, task to address?
  - Essential routine task(s) to maintain

- **Relevant Department Goals**
  - Which ones require action on your part?
  - What contributory actions do you need to take towards this goal?

**Development Needs/Interests**

- Additional skills or knowledge needed to perform KARs?
- Certification or education goals
S-M-A-R-T

**Specific**
Descriptive verb & specific result.

**Measurable**
Quantity, Quality, Yes/No.

**Actionable**
Actions within scope of job.

**Realistic**
Reasonably challenging & achievable.

**Time Bound**
Deadline, milestones or frequency.

SET
GOALS
**Specific: Descriptive Verbs**

- Administer
- Analyze
- Attain
- Calculate
- Create
- Decrease
- Design
- Develop
- Distribute
- Establish
- File
- Improve
- Increase
- Maintain
- Monitor
- Organize
- Participate
- Prepare
- Process
- Propose
- Reduce
- Research
- Schedule
- Solve
- Submit
- Train
- Write
**Measureable:**
- Freshman retention rate
- Cost per issue
- Percentage increase/decrease
- Words per minute
- Pieces per hour
- Supervisor/employee ratio
- Participation rate
- Number of complaints

**Results**
- Time to hire
- Geographic territory
- Number of clients served/repeat business
- Response time
- Satisfaction scores
- Dollars raised
- Increase in test scores
- Quality metric/error rate
**Actionable**

- Does this make sense within the scope of your job?
- Should this be a focus area for action?
- Is it an important priority?
Realistic

The greater danger for most of us is not that our aim is too high and we miss it, but that it is too low and we hit it.

- Michelangelo Buonarroti, Renaissance artist
Writing an Expectation

**SMART Formula:**

\[(\text{Action Verb}) \ (\text{Key Result}) \ \text{by (Target Date)} \ \text{by (How)}\].

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**Purpose of an Expectation/Goal**

To clearly communicate the nature of the work to be performed AND guidelines for determining if its performance is satisfactory. Requires a:

- Verb-noun component
- Standards component

-Fred Nichols
Distance Consulting, LLC
Expectation: Quantity

DESCRIPTION
Use of time is appropriate, plans and prioritizes work, sets and accomplishes goals, uses available resources wisely and completes assignments.

Examples

- “Complete assigned tasks within the expected timeframe .”

- Decrease set-up time by improved staging of materials and supplies.

- Reduce number of call-backs by learning from Benefit Coordinators the most frequently-asked questions.
Expectation: Quality

DESCRIPTION
Work effort that consistently achieves desired outcomes without errors and problems.

Examples

- “Ensure availability of needed supplies by conducting monthly inventories and ordering supplies upon request.”

- Improve telephone courtesy by creating a standard greeting, smiling into the phone, and offering to help.

- “Eliminate overlooked tasks by conducting self-inspections of each area using the standard training checklist.”

- Maintain accuracy of grant account budgets by monthly audits of expenditures and receipts.
Expectation: Job Knowledge

DESCRIPTION
Level of job-relevant knowledge and skills needed to perform the duties and meet job requirements.

Examples

- “Create/utilize checklist by 10/31/2012 to train undergraduate researchers in lab procedures & protocols during first week on the job.”

- Assist in orientation of new hires to department practices such as team meetings, breaks, supplies.

- “Devise a minimum of two new testing protocols independently and evaluate effectiveness. Document successful processes and communicate to other technicians by May 15, 2012.”
Sample Work Expectations

- Send responses to all subscription requests within 48 hours of contact and report compliance monthly. (Routine)

- Reduce response time for subscription requests from one week to 48 hours by creating electronic packet by May 1, 2013. (Problem)

- Assist six campus departments develop strategic communications plans aligned with University’s strategic messaging philosophy by 12/31/12. (Project)
How SMART?!?

**Smart:**

Improve the quality of the performance review process by April 30, 2013.

**Smarter:**

Increase to 50% the number of staff who have entered Step 1 goals/ expectations and development plans; increase to 70% the number who have entered comments for Mid-Year and Year-End reviews.
# Work Goals vs. Development Plans

**WORK GOALS**

Achieve completion of Endeavor Talent Profile for 50% of all salaried, non-faculty staff by 4/30/2013.

**DEVELOPMENT PLANS**

- Increase teamwork efforts by collaborating with each HR Business Partners to co-facilitate client events/retreats by May 15, 2013.
- Learn how to complete all Talent Profile screens, upload and download information by 2/28, 2013.

Complete **Worksheet: Development Needs & Action Plan** section.
Monitor Progress

eNDeavor is your best friend when it comes to documenting your progress!

“Notes” function

https://endeavor.nd.edu
“Notes” Function

Endeavor tip MANAGER NAME:

*About Me*, which is located on the Home Dashboard, includes your manager name. Call the askHR Customer Service Center at 631-5900 or email them at askHR@nd.edu if this information has changed.
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2. Search Employee to View
1. Enter subject

Subject *

Writing SMARTer Goals Training

2. Enter progress notes or paste from other document

Notes

Attended on August 7, 2012. Wrote two goals and one development plan activity.