Goal Setting and Planning Best Practices

Goal Setting and Planning

During Goal Setting, managers and individual contributors should work together to identify 3-5 goals that reasonably reflect the most important accomplishments required for success. Consider the work to be done, the desired outcome and alignment with Vision In Action: Lead On.

TCU Core Competencies

These core competencies are considered universal regardless of function or role. Competencies measure knowledge, skills and observable behaviors that lead to success. Refer to the Core Competencies section in PageUp Performance for a detailed description of each competency.

- Communication
- Job Knowledge/Skill Application
- Critical Thinking/Problem Solving

- Teamwork/Collaboration
- Diversity, Equity, and Inclusion
- Responsibility and Integrity

Plan and Prepare

Individual Contributor Role	Manager Role
Review goals set in the previous year (if applicable)	
Review job description	
Consider what goals would lead to success in the job	Consider what has helped the individual contributor achieve goals in the past
What professional development opportunities would help?	Are there areas of opportunity specific to TCU's core competencies? What goals would ensure success?
What barriers exist in accomplishing the goals? What resources or support is needed?	
What does goal completion look like?	

Types of Goals
- **Job-related**: Clearly describes tasks that are required on the job. Makes the expectations for the job clearer than they are listed on the job description. These goals personalize the job to the position and to the individual contributor.
- **Project-related**: Activities that the individual contributor will pursue with a beginning and an end and may be above and beyond the individual contributor's routine duties. May be related to improving systems, developing and creating new programs or other projects.
- **Professional Development**: Specify what the individual contributor will learn for the coming year. These are intended to increase an employee's knowledge or skill set for overall growth.

Professional development goals not only develop the individual contributor, but also help the University and the department.

- **Improvement**: Established to outline specific areas of improvement (behavioral or performance) needed to achieve a rating of at least "Meets Expectations."
- **Stretch**: Ambitious goals established to challenge an individual contributor to grow particular knowledge or skills. These types of goals are not usually accomplished in one year.
- **Team**: Established for an entire group or team. These types of goals help teams identify action plans and determine what constitutes a meaningful result.

Smart Goals

SPECIFIC   MEASUREABLE   ACHIEVABLE   RELEVANT   TIME-BOUND

The SMART goal method will ensure both the manager and individual contributor are aligned with expectations and understand the path to reach them. Refer to the Effective Goal Setting-SMART Goals and the SMART Goal Setting template for assistance with creating goals and planning.

Discussion

- Individual contributor should share with their manager the proposed goals and describe how these goals contribute to the work.
- Manager should provide guidance and feedback on individual contributor's goals reinforcing alignment with department, division and University goals.
- Manager should discuss TCU's Core Competencies, how they relate to the goals and establish what success looks like.
- Discuss any barriers to achieving goals and what resources or support is needed.
- See Successful Goal Setting Dialogue for further guidance.

Follow-up

- Schedule a time to follow-up on progress of goals. At least two check-ins should occur before the annual performance evaluation.