




PERFORMANCE PLANNING AND ANNUAL GOAL SETTING
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IMPORTANCE OF PLANNING

- Promotes buy-in
- Empowers the worker
- Enhances communication between supervisor and employee
- Illustrates supervisor commitment to employee's success
- Provides clear expectations
- Allows collaborated movement toward goals



CREATING A CIRCULAR CYCLE



GOALS

- Measureable
- Related to last year's performance
- Two types:
 - Mandated by supervisor
 - Created by employee
- Related to specific areas of work
 - Programs & duties
 - Professional development
 - Personal development



CORE COMPETENCIES

- The aspects of work that are [mostly] intangible but very important high expectations
 - Job Knowledge
 - Accountability
 - Feedback
 - Interpersonal Relations
 - Communication: Verbal and Written
 - Motivation & Commitment
 - Competence in Managing Timely Logistics
 - Professionalism & Responsibility
 - Problem Solving & Reasoning



SAMPLE CORE COMPETENCY

Job Knowledge/Potential:

Is aware of all job duties and responsibilities and knows of the resources that can assist in performing those duties and responsibilities effectively and efficiently. Displays creativity and innovation in meeting and exceeding expectations.

Goals for this Core Competency:

- Put together a counseling notebook to help keep on top of how to counsel special populations
- Create a personal directory of 'people to contact' in specific situations

Check-In Date	Progress Notes
7/20/10	<i>What are some goals that could apply to ongoing knowledge creation, staying connected, thinking of new and/or creative ways to do the same job?</i>
4/19/11	<i>Michael has further mastered knowledge in his programs. He displayed strong creativity and programming skills in the Non-Resident Counselor Visit, specifically, Michael knows who in the office and on campus can help him and he uses those resources and connections well.</i>
4/22/11	<i>I have created a counseling notebook that includes all of historical and ongoing resources needed for file review, counseling populations. I have also created a binder of all of the procedures necessary to do my various jobs and programs effectively. I think this will be a good resource not only for me but the person in my position afterwards.</i>



SAMPLE GOAL

Ram Call

- Effectively train coordinators to run Ram Call operations in two weeks (last year it took a month)
- Be aware of take immediate action on snags and errors throughout the process to aid in the continual improvement of using the Recruitment Plus
- Conduct training in two tiers – one overview with CRM training and one hands on piece at the work stations

Check-In Date	Progress Notes
7/21/10	<i>Consider having a separate and longer meeting for AA RamCall training and planning it further in advance.</i>
4/19/11	<i>He is a great leader for students and has high expectations. He did a very good job in managing the work of the Ambassadors for this project and making sure all of the calls were done on time.</i>
4/22/11	<i>Ram Call has been very efficient and productive this year, the Ambassadors generally remain positive about the program and are making quite a few phone calls each night. RamCall training was accomplished in two weeks time as planned and continued with ongoing conversation about how to be more effective managers.</i>



PLANNING MEETINGS

- Reviewing competencies and programmatic duties
- Creating goals
- Scheduling check in meetings



CHECK-IN MEETINGS

- Reviewing competencies and programmatic duties
- Reviewing goals
- Giving and receiving feedback
- Providing rewards and incentives
- Discussing resources
- Amending/Revising goals if needed



REVIEW MEETING

- Reviewing competencies and programmatic duties
- Reviewing goals
- Giving and receiving feedback
- Providing rewards and incentives
- Discussing resources
- Setting next year's goals



QUESTIONS