Goal Setting for Supervisors
To-Do Checklist

☐ Recognize this is part of Step 1 of the evaluation process
  ☐ Review current competencies
    ☐ Determine if competencies should be changed based on current role/job description
    ☐ Edit competencies if necessary
  ☐ Determine goals
    ☐ Determine what goals should be accomplished during the year that support growth in order to best serve the department, division, and the University.

☐ Prepare to meet with direct report
  ☐ Access the job description of the direct report in Workday. If the job description is not available in Workday, then one must be provided to the Director of Classification and Compensation for review.
  ☐ Provide a copy of the job description to the direct report (or in the alternative, advise the direct report how access the job description in Workday)
  ☐ Ask the direct report to review the job description and be prepared to discuss:
    ☐ Changes to the duties listed, if any
    ☐ Thoughts on improvements for any processes
    ☐ Thoughts on tools or skills that might benefit how execute duties

☐ Meet with the direct report
  ☐ Have a bilateral discussion regarding any changes to the job description
  ☐ Discuss goals that support the direct report’s role and align with department objectives
  ☐ Discuss how goals will be measured
  ☐ Discuss how successful completion of goal will be applied for the benefit of the department, division, or University
  ☐ Apprise the direct report of any goals that a unit head or vice president cascaded to all of the supervisor’s direct reports
  ☐ Make a plan for a rough draft of SMART goals (using the SMART goal worksheet as necessary), including:
    ☐ Whether you as the supervisor will draft SMART goals to cascade to the direct report
    ☐ Whether the direct report will draft SMART goals
  ☐ Determine a date by which the SMART goals will be drafted and reviewed
  ☐ Set a follow-up meeting
☐ Have a follow-up meeting
  ☐ Discuss any edits to the drafts of the SMART goals
  ☐ Determine which goals will be prioritized for the current evaluation year
  ☐ Discuss the applicable categories for the goals
  ☐ Discuss the weighting of each goal that will be evaluated for the current evaluation year
  (total weight of goals shall not exceed 100)
  ☐ Determine whether the direct report, you, or both of you will be responsible for entering the goals into Workday

☐ FOLLOW UP!!!
  ☐ Approve any SMART goals cascaded by a unit head or vice president
  ☐ Approve SMART goals entered by the direct report
  ☐ Provide necessary resources for direct report to accomplish goals, including but not limited to:
    ☐ Release time to attend course, workshop, study for certification exam, etc.
    ☐ Funding for registration, course fees, etc.
    ☐ Feedback
      ☐ Progress report
      ☐ Recognition
      ☐ Constructive correction
  ☐ Inquire how the direct report is progressing in the completion of the goal
  ☐ Discuss whether the completion of the goal yielded the anticipated result
  ☐ Continue to support the direct report through meetings, ad-hoc conversations, e-mails, etc. throughout the evaluation year