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Purpose

To establish a road map for the execution of performance-related objectives, which support the department, division, and University responsibilities and initiatives, so that employees can be successful in achieving stated priorities.

Writing SMART Goals

Policy Reference

Goal setting is referenced in Section C 2 (Goal Setting) and C 4 (Evaluation Procedures) of University policy 817.91 (Staff Annual Performance Evaluation).

Where to Start

Employees along with their supervisors, should review the job description and consider the results for which they are accountable. They should create a goal bucket focusing on the actual results, keeping in mind 1) the characteristics of the goal (see Category below), and 2) the actions required for successful completion. (See Sample Verbs below).

Goal Types

Goals should be based upon on-going job responsibilities and can be any new projects, assignments, priorities, and initiatives specific to the evaluation period. Goals should be high level enough to encompass the core outcomes for which employees are responsible, but specific and clear enough to measure success.

Number of Goals per Evaluation Period

Employees should identify and complete between three (3) and five (5) goals per evaluation period. If more than five goals are identified, it is an indication that goals are scoped at too low a level and are focused more on tasks, than on end results.

Use of Verbs

The goals need to convey the action required for the successful execution of the goal. Verbs such as “improve,” “reduce,” or “increase,” imply the direction toward which one wants a result to move, however, they do not explain the role or specific action that one will take to accomplish the goal.

Below is a list of sample verbs that convey specific action.

Administer	Evaluate	Plan	Supervise
Coordinate	Implement	Process	Support
Create	Maintain	Produce	Transition
Develop	Manage	Provide	Update
Direct	Oversee	Reconcile	Write

The Acronym SMART

Specific

Exactly what do I want to accomplish?

The goal should be simply written, well defined and clear. It is not a detailed list of how a goal will be met, but it should include answers to the basic “W” questions: Who, What, Where, When, and Why?

- Consider **who** needs to be involved to achieve the goal (particularly when working on a group project).
- Think about exactly **what** is to be accomplished.

- Consider **when** the goal can be accomplished.
- **Where** may not always be applicable, however if there is a location or relevant event (i.e. out-of-state conference), it should be considered.
- Think about **why** this goal is important and the reason to accomplish it.

Measurable

What metrics will be used to determine if goal is met?

A metric is a source of information to measure or determine whether a goal has been successfully achieved. It can be quantitative or qualitative. Regardless, it is an indicator of what success for a particular goal will look like. Data types include:

- Quality/accuracy rates;
- Amounts produced;
- Revenue generated;
- Productivity rates;
- Certifications, and
- Customer satisfaction feedback.

Data collection methods include:

- Automated reports;
- Audits;
- Tests;
- Surveys;
- Work products;
- Samples;
- Other documents.

Sometimes measurement is difficult and supervisors and staff members should work together to identify the most relevant and feasible data sources and collection methods.

Even if a perfect, direct measurement source is not immediately feasible for a given goal, the discussion about the desired end result (why this goal is important) and what the measurement options are (what success might look like) is an important and valuable part of performance planning.

Action-Oriented

What are the logical steps?

This focuses on how a goal will be accomplished. Supervisors and employees shall identify the tool or the means by which the goal will be accomplished.

Examples include: participation in an in-person, virtual, or on-demand training, completion of a certification, execution of work productivity plan, fundraising, or contact quota.

Also, the necessary support from the supervisor should be identified. Examples of such support include (but not limited to) release time for the employee and registration costs.

Relevant

How is this goal in line with the employee's job, or the strategic plan and mission of the team, the department, the division and Furman?

Writing SMART Goals

This refers to the point of accomplishing the goal. A goal cannot be an outlier – it must fit within the scope of responsibilities of one’s position and within the objectives of the department, division, and University.

Time-Bound

How much time is required to complete the goal?

This not only refers to the amount of time budgeted to complete a goal, but also when it can be completed. Considerations include the current responsibilities of the employee, possible interruptions, amount of time to successfully apply newly learned skills, specific dates of offered trainings, and deadlines. These elements must be weighed when identifying a date to complete a goal.

Using SMART Goal Worksheets

The SMART Goal Worksheet is a tool to assist supervisors and employees draft goals using the SMART format. Start with a goal statement, then answer the questions for all five elements of the SMART goal. In the space for “SMART Goal Description” craft two or three sentences using the responses to the questions. Lastly, in the “Category field and Weight field, enter a category and a percentage for the goal. The category can be entered at the time the goal is entered into Workday. The weight can be entered by the employee during [Step 3: Set Review Content \(Identify SMART Goals\)](#) of the evaluation process.

SMART Goal Examples

Below are examples of how to draft a SMART goal using the SMART goal worksheet. Each of the three examples include a goal statement, all elements of a SMART goal, and a final draft of a SMART goal.

Example No. 1

SMART Goal Statement:	In one sentence, broadly state the goal/objective. Implement a Correspondence Response Plan
S	The goal should be simply written, well-defined and clear. It is not a detailed list of how you're going to meet a goal, but it should include answers to the basic "W" questions: Who, What, Where, When, and Why? Exactly what do I want to accomplish? For students should hear back from our staff within two days of their writing, calling or visiting with a response to their specific questions.
M	This is the source of information to measure or determine whether a goal has been successfully achieved. Sample data collection methods include reports, audits, tests, surveys, work product, or other document. Data types include, quality and accuracy rates, productivity rates, amounts produced, revenue generated, or customer satisfaction. How will I measure my progress during and/or after? A log will be created that supervisor will review. A minimum of 90% of responses should be done in the two-day time frame.
A	Identify the activity and the tools or the means by which the goal will be accomplished. Examples include taking a course, attending a conference, participating in an online training, or utilizing a coach/mentor. Also, identify what support you anticipate receiving from your supervisor to complete the goal (i.e. release time, registration costs, etc.) What are the logical steps I need to take? Create the log, discuss with team to get input on how to best manage responses across the team.
R	Weigh the importance of completing the goal as it pertains to alignment with the objectives of your job, department/division, and University. Also, consider whether you have the prerequisite skills to complete the goal and if it is the appropriate time to complete the goal. How is this in line with my job, my team's, my department's/division's and Furman's strategic plan and mission? Our team serves students. Getting them timely information, including providing them responses to their questions, is a divisional objective.
T	Set a target date to complete the goal. If the goal is on-going for a period of weeks or months, define what should be achieved at designated points in the process (i.e. at the 30-day mark, at the 60 day mark). When will I complete this goal? This initiative is on-going. The log, which will be reviewed at the end of each month will be created by July 1.
SMART Goal Description:	Use the information above to create two or three sentences for the description. * "Implement a correspondence response plan that allows for students to receive communication from the department within two-business days. A success rate of 90% should be reflected in the response time log" # Category: Job Responsibility; Time Management % Weight: 30

*Text is truncated in this example. On the actual worksheet text can be scrolled. #The Category field can be entered at the time the goal is added in Workday. %The weight field can be entered by the employee during **Step 3: Set Review Content (Identify SMART Goals)** of the evaluation process.

In this example, a "Not-SMART" goal is ***"Improve our student services."*** As written, this goal addresses a desire to provide better service, but it does not identify any particular issue, or state any guidance on how services for students would be improved.

The SMART goal (written in the SMART Goal Description field) is ***"Implement a correspondence response plan that allows for students to receive communication from the department within two-business days. A success rate of 90% should be reflected in the response time log which is reviewed at the end of each month."*** As written, each element is addressed.

Specific – *"allows for students to receive communication from the department within two-business days"* states what must be accomplished.

Measurable – *"A success rate of 90% should be reflected in the response time log"* tells what is considered a success and how the responses are going to be tracked.

Action-Oriented – *"Implement a correspondence response plan"* identifies the act which must take place to begin the goal.

Relevant – Although not expressly stated in the draft of the SMART goal, the notion that serving students in a prompt manner is implied.

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Time-Bound – There is no specific completion date for this goal, but, with the statement “*reviewed at the end of each month,*” it is known that on a monthly basis, that the log will be reviewed to determine the success of the plan.

Example No. 2

SMART Goal Statement:	In one sentence, broadly state the goal/objective. Obtain Hazardous Materials Certification	
S	The goal should be simply written, well-defined and clear. It is not a detailed list of how you're going to meet a goal, but it should include answers to the basic “W” questions: Who, What, Where, When, and Why? Exactly what do I want to accomplish? Receive certification for handling hazardous materials so that I know how to properly store/mix such products and chemicals.	
M	This is the source of information to measure or determine whether a goal has been successfully achieved. Sample data collection methods include reports, audits, tests, surveys, work product, or other document. Data types include, quality and accuracy rates, productivity rates, amounts produced, revenue generated, or customer satisfaction. How will I measure my progress during and/or after? I will get a certificate after I pass the hazardous materials course. The certificate will be good for two years.	
A	Identify the activity and the tools or the means by which the goal will be accomplished. Examples include taking a course, attending a conference, participating in an online training, or utilizing a coach/mentor. Also, identify what support you anticipate receiving from your supervisor to complete the goal (i.e. release time, registration costs, etc.) What are the logical steps I need to take? I will take an infection materials workshop at XYZ University. Course cost \$XX.00. I need four hours of release time.	
R	Weigh the importance of completing the goal as it pertains to alignment with the objectives of your job, department/division, and University. Also, consider whether you have the prerequisite skills to complete the goal and if it is the appropriate time to complete the goal. How is this in line with my job, my team's, my department's/division's and Furman's strategic plan and mission? This will promote staff safety, ensure that the campus is healthy and I as an employee will learn a new skill that I can apply to my daily work.	
T	Set a target date to complete the goal. If the goal is on-going for a period of weeks or months, define what should be achieved at designated points in the process (i.e. at the 30-day mark, at the 60 day mark). When will I complete this goal? Course and exam are on MM/DD/YY.	
SMART Goal Description:	Use the information above to create two or three sentences for the description. • “Participate in infection materials workshop offered at XYZ University on MM/DD/YYYY. Objective is to learn what materials are considered infectious. the standard for cleaning such materials to	# Category: Job Responsibility; Safety % Weight: 40

*Text is truncated in this example. On the actual worksheet text can be scrolled. #The Category field can be entered at the time the goal is added in Workday. %The weight field can be entered by the employee during **Step 3: Set Review Content (Identify SMART Goals)** of the evaluation process.

In this example, a “Not-SMART” goal is “*Increase knowledge of hazardous materials.*” As written, this goal addresses a desire to know more information, but it does not address the purpose, or reference any tool to learn this information or how it will be beneficial for the employee or the department.

The SMART goal (written in the SMART Goal Description field) is “*Participate in infection materials workshop offered at XYZ University on MM/DD/YYYY. Objective is to learn what materials are considered infectious, the standard for cleaning such materials to maximize safety for custodial staff members and campus. Authorization of release time to attend the off-campus workshop, along with the \$XX.00 fee are necessary. Supervisor will be notified by the workshop facilitator at XYZ University of certification which will be valid for two years.*” As written, each element is addressed.

Specific – “*learn what materials are considered infectious, the standard for cleaning such materials*” states the desired skill to be acquired.

Measurable – “*Supervisor will be notified by the workshop facilitator at XYZ University of certification*” tells that the goal will be measured by the earning of a certification.

Action-Oriented – “*Participate in infection materials workshop offered at XYZ University*” identifies the activity for the goal. Also, “*Authorization of release time to attend the off-campus workshop, along with the \$XX.00 fee are*

necessary”addresses the responsibilities of the supervisor to support this goal – release time and payment of the workshop registration fee.

Relevant – “*maximize safety for custodial staff members and campus*”informs the reader of the relevancy of the goal, which aligns with an overall value of the University.

Time-Bound – There are two references to the time-bound nature of this goal. The first the date of the course, “*MM/DD/YY.*” The second is the length of the validity of the certification, “*valid for two years.*”

Example No. 3

SMART Goal Statement: *In one sentence, broadly state the goal/objective.*
 Learn How to Manage Goals in Workday

S The goal should be simply written, well-defined and clear. It is not a detailed list of how you're going to meet a goal, but it should include answers to the basic “W” questions: Who, What, Where, When, and Why?
Exactly what do I want to accomplish? Learn how to add and edit goals in Workday as well as learn how to write goals in the SMART format.

M This is the source of information to measure or determine whether a goal has been successfully achieved. Sample data collection methods include reports, audits, tests, surveys, work product, or other document. Data types include, quality and accuracy rates, productivity rates, amounts produced, revenue generated, or customer satisfaction.
How will I measure my progress during and/or after? Success will be measured on participation in the offered workshops and how well I draft my goals for approval.

A Identify the activity and the tools or the means by which the goal will be accomplished. Examples include taking a course, attending a conference, participating in an online training, or utilizing a coach/mentor. Also, identify what support you anticipate receiving from your supervisor to complete the goal (i.e. release time, registration costs, etc.)
What are the logical steps I need to take? Participate in two Fall workshop – writing SMART goals and Add and Edit Goals. I need a total of two hours of release time.

R Weigh the importance of completing the goal as it pertains to alignment with the objectives of your job, department/division, and University. Also, consider whether you have the prerequisite skills to complete the goal and if it is the appropriate time to complete the goal.
How is this in line with my job, my team's, my department's/division's and Furman's strategic plan and mission? I'm learning skills that improve my work performance and meet a departmental objective

T Set a target date to complete the goal. If the goal is on-going for a period of weeks or months, define what should be achieved at designated points in the process (i.e. at the 30-day mark, at the 60 day mark).
When will I complete this goal? Goal will be completed during the fall term after attend the course and write goals in Workday. No later than MM/DD/YY.

SMART Goal Description: *Use the information above to create two or three sentences for the description.*

* Participate in workshops on managing goals in Workday offered by Human Resources during the Fall term. The objective is to learn how to add and edit goals as well as write goals in the SMART format.	# Category:	Competency-Related
	% Weight:	30

*Text is truncated in this example. On the actual worksheet text can be scrolled. #The Category field can be entered at the time the goal is added in Workday. %The weight field can be entered by the employee during [Step 3: Set Review Content \(Identify SMART Goals\)](#) of the evaluation process.

In this example, a “Not-SMART” goal is “*Improve goal writing skills.*” As written this goal addresses a desire to learn how to do a task better, but not the steps to achieve the objective.

The SMART goal (written in the SMART Goal Description field) is “*Participate in workshops on managing goals in Workday offered by Human Resources during the Fall term. The objective is to learn how to add and edit goals as well as write goals in the SMART format. Release time by the supervisor is necessary to attend the one hour virtual workshops. Successful completion of the goal will be denoted by completion of the two workshops and staff member’s ability to properly execute this task in Workday.*” As written, each element is addressed.

Specific – “*learn how to add and edit goals as well as write goals in the SMART format*”states the desired skills which the staff member is to learn.

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M measurable – “*completion of the two workshops and staff member’s ability to properly execute this task in Workday*” are examples of a two-prong measurable – workshop attendance and actual the work product.

Action-Oriented – There are three actions referenced in the SMART goal. The first is “*Participate in workshops on managing goals in Workday*” addressing a key activity for the goal. The second is “*Release time by the supervisor*” which addresses the responsibility of the supervisor to support this goal. The third is what was previously mentioned under Measurable – “*staff member’s ability to properly execute this task.*” In other words, the staff member must successfully apply what was learned during the workshops.

Relevant – Although not expressly stated in the draft of the SMART goal, learning tools to help in the alignment with departmental, division, and University objectives is implied.

Time-Bound – “*Fall term*” references both when the staff member will complete the workshops and when the SMART Goals will be entered into Workday.

Example of Compilation of SMART Goals

The example of the compilation of SMART goals below is of the three previous examples. This is an approximation of how it will appear on the worksheet.

Compilation of SMART Goals	
SMART Goal One	
SMART Goal Statement:	Implement a Correspondence Response Plan
SMART Goal Description:	Implement a correspondence response plan that allows for students to receive communication from the department within two-business days. A success rate of 90% should be reflected in the response time log which is reviewed at the end of each month.
Category:	Job Responsibility; Time Management
Weight:	30
SMART Goal Two	
SMART Goal Statement:	Obtain Hazardous Materials Certification
SMART Goal Description: *	Participate in infection materials workshop offered at XYZ University on MM/DD/YYYY. Objective is to learn what materials are considered infectious, the standard for cleaning such materials to maximize safety for custodial staff members and campus. Authorization of release time to attend the off-campus workshop, along with the \$XX.00 fee are necessary. Supervisor will be notified by the workshop
Category:	Job Responsibility; Safety
Weight:	40
SMART Goal Three	
SMART Goal Statement:	Learn How to Manage Goals in Workday
SMART Goal Description:	Participate in workshops on managing goals in Workday offered by Human Resources during the Fall term. The objective is to learn how to add and edit goals as well as write goals in the SMART format. Release time by the supervisor is necessary to attend the one hour virtual workshop. Successful completion of the goal will be denoted by staff member's ability to properly execute this task in Workday.
Category:	Competency-Related
Weight:	30
SMART Goal Four	
SMART Goal Statement:	
SMART Goal Description:	
Category:	
Weight:	

*Text is truncated in this example. On the actual worksheet text can be scrolled.

Total Weight: 100
 Weight of all goals shall not exceed 100

What Next?

Use the [SMART Goals Worksheet](#) to draft goals. It is available for download from the Annual Performance Evaluation section of the HR website. After the goals have been drafted, utilizing the instructions for **“How to View, Edit, and Add Goals”** (if you are the staff member) or **“How to Cascade Goals”** (if you are the supervisor), copy and paste all fields below but the weight into Workday.

Writing SMART Goals

Resources

Office of Human Resources website

Instructional content available on the Office of Human Resources website for this subject include:

- The SMART Goal Worksheet (supervisor or staff member)
- Writing SMART Goals video tutorial **Available soon**

Workday Training@Furman

Instructional content available on the Workday Training@Furman website (or via the Help application on Workday) related to this subject include: **Available soon**

- How to Add and Edit Goals video tutorial and print companion (staff member)
- How to Add and Edit Goals written guide (staff member)
- Step 3: Set Review Content (Identify Goals) video tutorial and print companion (staff member)
- Step 3: Set Review Content (Identify Goals) written guide (staff member)
- How to Cascade Goals video tutorial and print companion (supervisor)
- How to Cascade Goals written guide (supervisor)
- How to Approve Goals video tutorial and print companion (supervisor)
- How to Approve Goals written guide (supervisor)
- Step 4: Set Review Content (Review Staff Member Goals) video tutorial and print companion (supervisor)
- Step 4: Set Review Content (Review Staff Member Goals) written guide (supervisor)

Frequently Asked Questions

Question	Answer
What if I can't think of any goals?	Staff members ought not work by themselves in determining what goals to accomplish. They should work with their supervisors in identifying goals by having a discussion about job and departmental responsibilities.
Can I include personal goals?	Personal goals addressing objectives that do not relate to performance should not be included.
What is the minimum number of goals to write?	The minimum number of goals is three; However, on the SMART Goal Worksheet, there is space to write four goals.
Who is responsible for writing the goals – the staff member or the supervisor?	This is to be determined jointly by the staff member and the supervisor. Some supervisors may prefer to draft goals and cascade them in Workday, but others may prefer staff members draft their own goals for approval by the supervisor.
Can long-term goals have a completion date that is in the next evaluation year?	As completion of a goal is a part of the evaluation for that particular evaluation year, goals should not have a completion date beyond the conclusion of the evaluation year. Long-term goals should be drafted into smaller segments, to maximize the opportunity for completion. The next phase or phases of the broad long-term goal can be identified for evaluation during the subsequent evaluation year.
When will we weigh goals?	The staff member and the supervisor can determine during the initial goal setting process the approximate weight for a goal. The goal will be weighted after the evaluation has been started by the supervisor, during Step 3: Set Review Content (Identify SMART Goals) .
Do goals count in the evaluation?	Yes, beginning with the 2021-22 evaluation, the goals account for 50 percent of the evaluation rating.