



Brandeis University

Preparing for the Annual Performance Review  
*For Managers*

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*Office of Human Resources  
Workshop for Managers*

*Topic: TAP = Talent Advancement  
Program*

*Presented by Cynthia Farquhar*

# Introductions

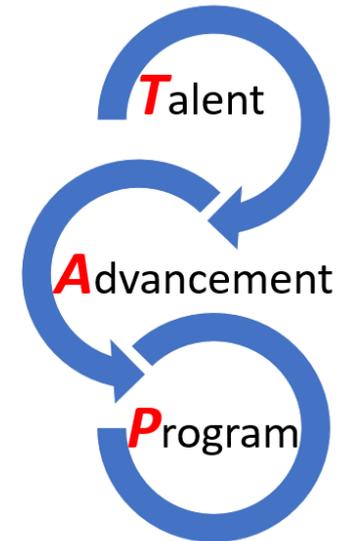
Using the chat please share

**Your name, title and department**

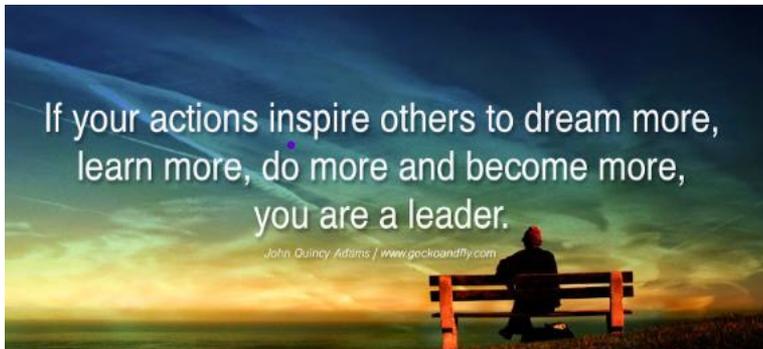
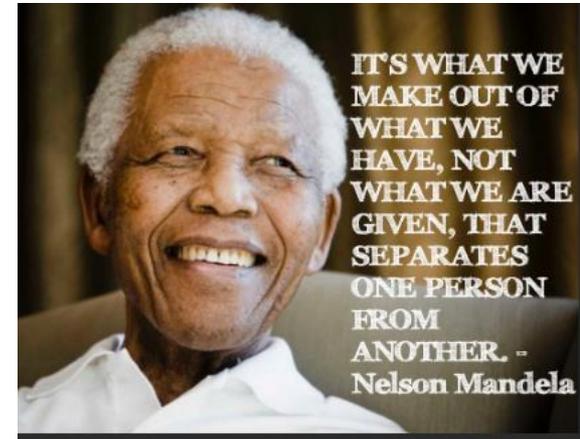
## Agenda

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- Manager Survey Results
- Process Timeline
- Annual Review
- Competencies and Ratings
- Using Workday for the Annual Performance Review
- Merit Process - PREVIEW
- Next Steps and Resources
- Q & A
- Appendix:
  - Core Manager Responsibilities
  - Goal Setting
  - Managing Emotional Impact



## Leadership Quotes



A leader is one who knows the way, goes the way, and shows the way.  
—John Maxwell

 The **courage of leadership** is giving others the chance to succeed even though you bear the responsibility for getting things done.

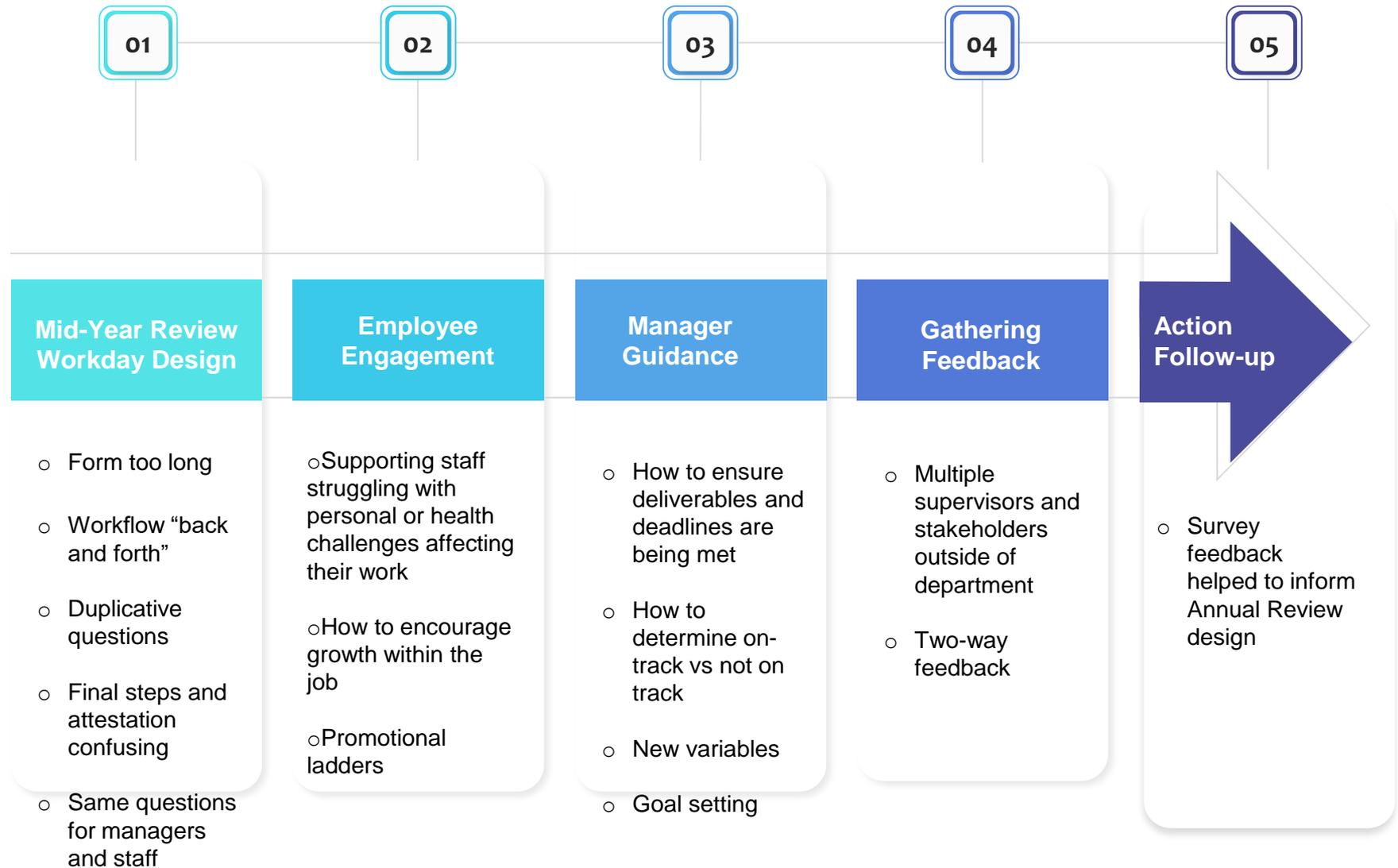
~Simon Sinek



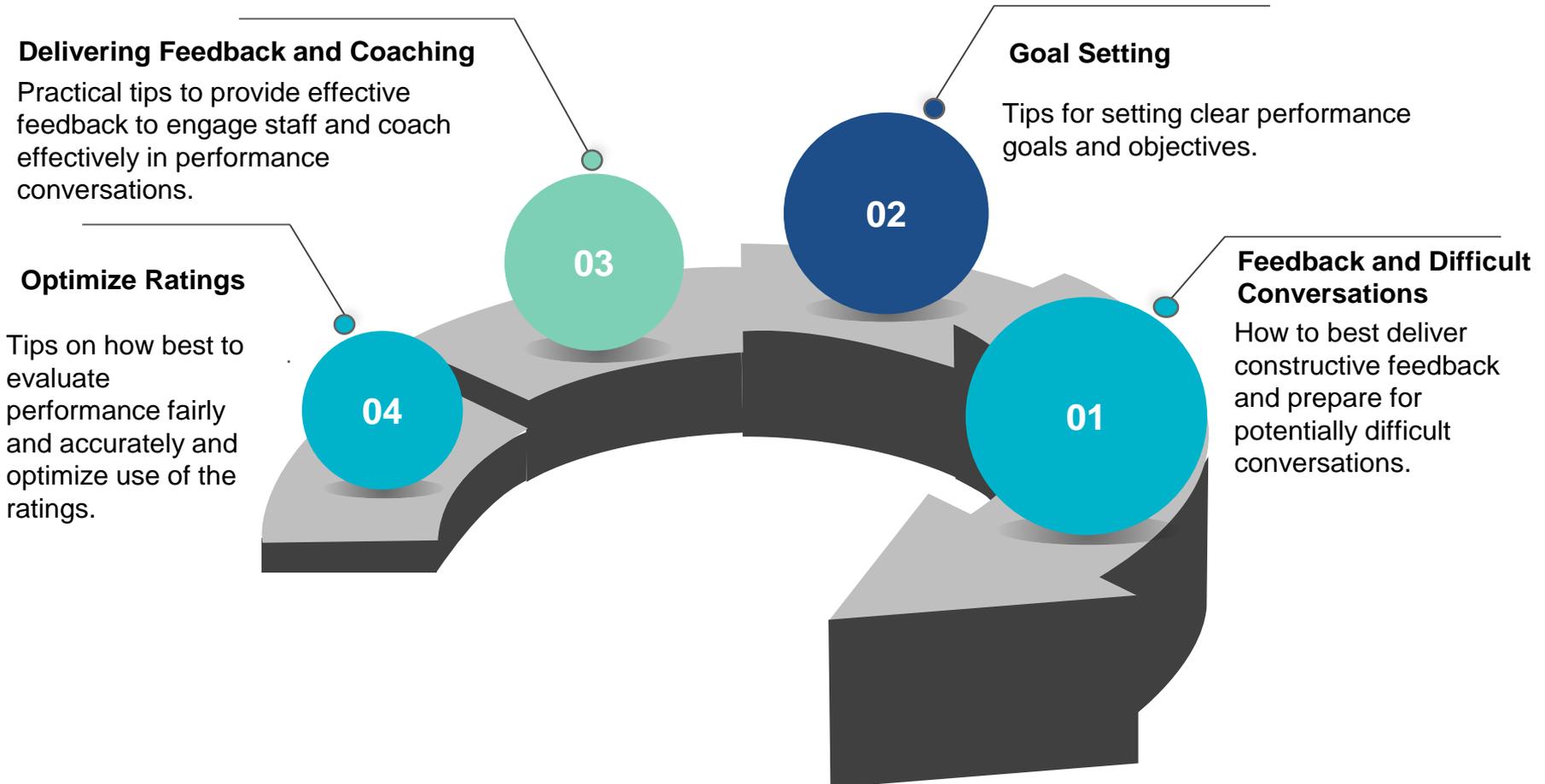
Human Resources Office

Champions keep playing until they get it right. – Billie Jean King, Former World No. 1 Professional Tennis Player

## Manager Survey on Mid-year Review: We Heard You



## Training Topics Requested– Top Four

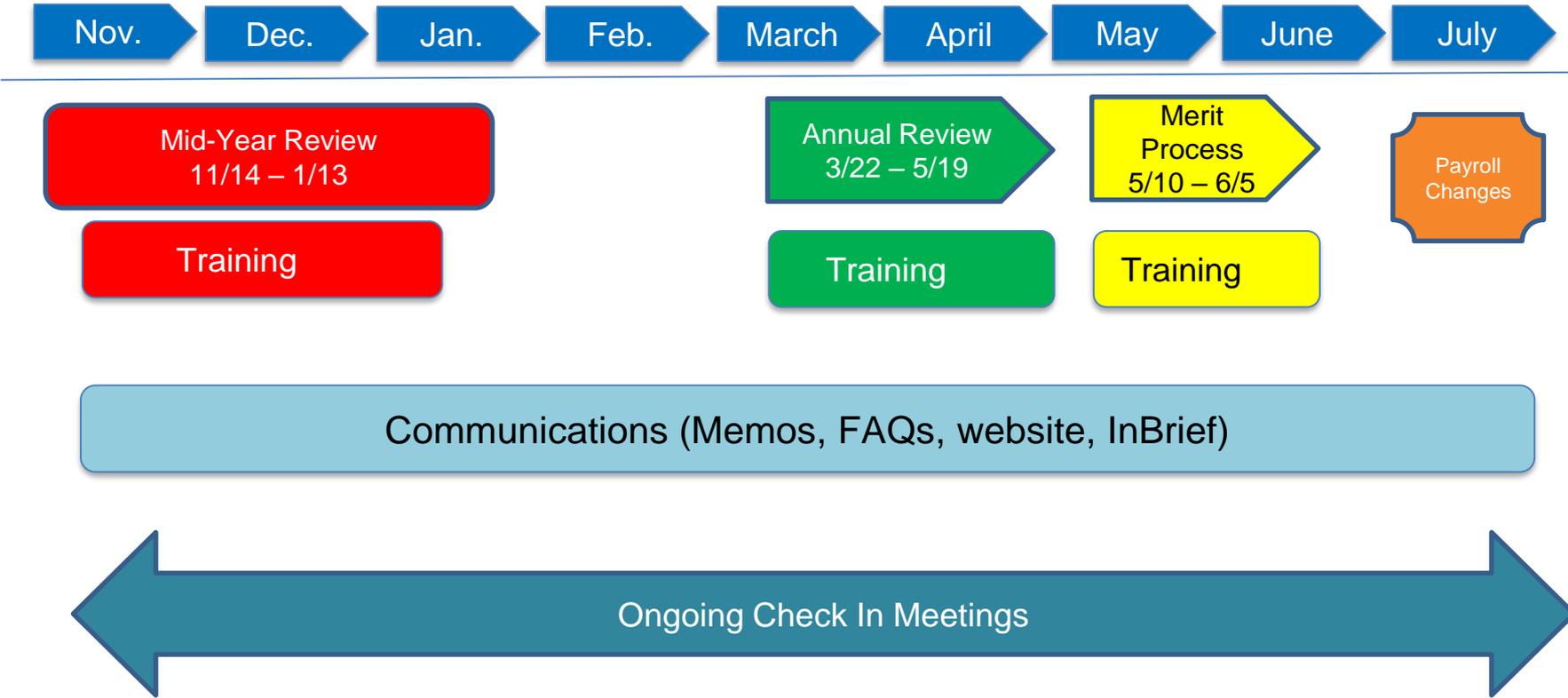


# TAP PERFORMANCE CYCLE ANNUAL REVIEW PROCESS TIMELINE

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# TAP Timeline 2022 -2023



## TAP Performance Cycle Summary



### May/June/July

- Annual review including goal setting.
- Assessment of performance and competencies.
- Merit determination based on performance.
- Complete in Workday



### Year Round

- Ongoing feedback.
- Check-in meetings.
- Weekly/bi-weekly.
- Review goals/objectives.
- Document for easier recall.



### November/December

- Mid-year review.
- Assess on-track or not on-track.
- Complete review in Workday.



# ANNUAL REVIEW

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## Annual Performance Review KEY DATES

### Timing/Key Dates:

- **March 22:** Workday opens for staff annual review self-evaluations.
- **May 19:** all annual reviews must be finalized in Workday; system will close for input.
- During the **March 22 – May 19** period, each step below must be completed:
  1. Eligible staff complete their self-evaluation.
  2. Managers complete their assessment and rating.
  3. Manager and eligible staff discuss the annual review.
  4. Process finalized in Workday.
- **May 10:** Merit process begins (more information to be provided).

***IMPORTANT: In order to provide adequate processing time for the full integrated cycle (annual review, merit review/input and payroll processing for July), the dates above cannot be adjusted or extended.***

## Staff Annual Review

Important dates: Workday opens for staff self-assessments on **March 22** and the deadline is **May 19** for managers to complete the process.

Consists of two main components:



**1**

Formal process to evaluate staff based on:

- ✓ Goals and objectives from past several months, and
- ✓ Competencies, and
- ✓ Overall performance



**2**

Establishment of:

- ✓ Goals
- ✓ Development areas
- ✓ For future review period (July – June)

## Staff Annual Review

### Annual Review Process in Four Steps:

**Step 1:** Staff member self-assessment

**Step 2:** Manager review and input

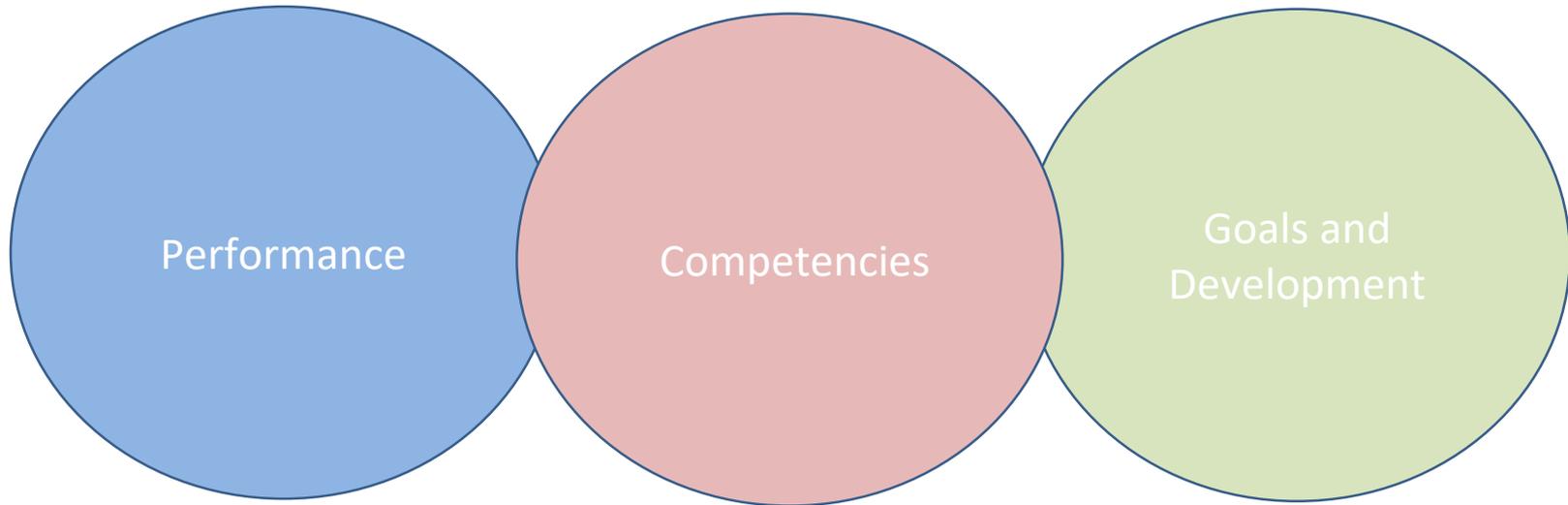
**Step 3:** Finalize review (following conversation between manager and staff)

**Step 4:** Attestation by staff member and manager

- Will be connected to the merit process to determine increases (where appropriate).
- Reviews will be saved in Workday and can be accessed in the future if needed. No more paper!

## Staff Annual Review

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- Utilize ongoing check-ins and mid-year review.
- Determine staff performance with ratings:
  - Exceeds Expectations
  - Successful
  - Developing
  - Improvement Needed
- Professional knowledge and accountability.
- Collaboration and communication.
- Learning and self-development.
- Diversity and Inclusion.
- Identify goals for future review period.
- Build as SMART goals if possible (see appendix).
- Identify development opportunities

## Staff Annual Review

### Preparing for the annual review

The annual review should be a holistic assessment of staff performance over the past 12 months.

It should take into account the check-in meetings and mid-year review:

- Review and utilize any notes made from the ongoing check-in meetings.
- Review and utilize the mid-year review (available in Workday).

### TAP Components = Efficient Process

If you have been utilizing the core components of TAP.....

- Including conducting effective ongoing **check-in** meetings, and
- Successful completion of the **mid-year** review

*.....the annual performance review should be an efficient process.*

# COMPETENCIES AND RATINGS

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## Core Competencies

Prior State	Present State	Of Note
Factors	Core Competencies	Renamed Fewer Clear behavioral definitions
<u>Ratings</u> 1.Exceeds Expectations 2.Meets Expectations 3.Partially Meets Expectations 4.Does Not Meet Expectations	<u>Ratings</u> 1.Exceeds Expectations 2.Successful 3.Developing 4.Improvement Needed	Renamed and refreshed for clarity and focus on engagement.
No Weighting	<ul style="list-style-type: none"> <li>Ratings are Weighted</li> <li>Two Components: Competencies 50% + Performance 50% = 100%</li> <li>Both the competencies are weighted equally.</li> <li><i>Development is not rated or weighted.</i></li> </ul>	<ul style="list-style-type: none"> <li>Staff rate their own competencies and performance.</li> <li>Managers also rate the staff member's competencies and performance.</li> <li>Manager's rating is the one that finalizes the review.</li> </ul>
Same form for Managers & Staff	Managers have additional competencies	Brandeis' commitment to developing leadership.

## Core Competencies

### Individual Contributor

- Professional Knowledge & Accountability
- Collaboration & Communication
- Learning & Self-Development
- Diversity & Inclusion

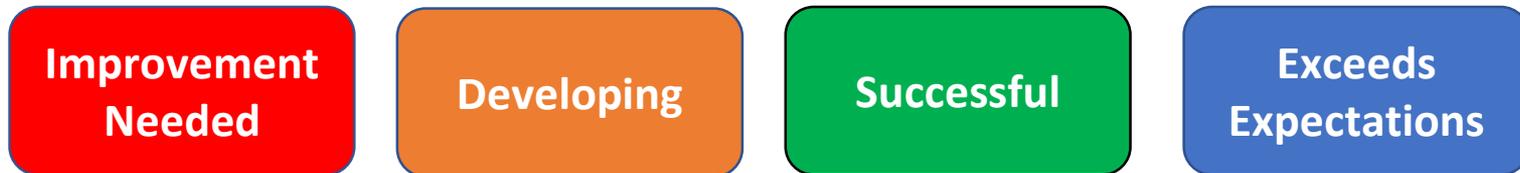
### Manager

- Professional Knowledge & Accountability
- Collaboration & Communication
- Acts Strategically & Innovatively
- Builds Trust
- Develops Talent
- Promotes an Inclusive Environment

## Performance Assessment - Ratings

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- In collaboration with Manager Focus Group, a new performance rating model has been developed:



- Managers should utilize the key components of TAP and actual performance when determining the appropriate employee rating.
- An appropriate distribution of staff into the corresponding rating categories is required. That is, do not lump all employees into the 'successful' category in an across the board method.

## Performance Assessment - Ratings

Rating	Description
<p><b>Exceeds Expectations</b></p>	<p><u>Behavioral definitions:</u></p> <ul style="list-style-type: none"> <li>· The employee consistently exceeds expectations and demonstrates exceptional performance and innovation in what is produced, how it is produced, and mastery of the competencies.</li> <li>· They are competent, innovative, collaborative, productive and go above and beyond the scope of the job.</li> <li>· They embrace change and seek continuous improvement opportunities, recommending solutions.</li> <li>· The employee is often sought out by others for counsel and assistance and is widely recognized as a role model who willingly shares knowledge and takes initiative to go above and beyond expectations.</li> <li>· They lead change efforts, identify new opportunities and champion continuous improvement with significant positive impact. They require minimal direction.</li> <li>· <b>This rating should be used sparingly and reserved for exceptional contributors throughout the review period.</b></li> </ul>
<p><b>Successful</b></p>	<p><u>Behavioral definitions:</u></p> <ul style="list-style-type: none"> <li>· The employee consistently achieves expectations.</li> <li>· They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies.</li> <li>· Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period.</li> <li>· The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities.</li> <li>· They consistently take initiative and require moderate to minimal direction.</li> </ul>
<p><b>Developing</b></p>	<p><u>Behavioral definitions:</u></p> <ul style="list-style-type: none"> <li>· The employee achieves expectations in some areas and falls below in others.</li> <li>· Actions and outcomes demonstrate inconsistent capability and/or effort or require significant guidance and support.</li> <li>· This category may include new employees who may be evaluated against “learning the job” versus expectations for longer tenured fully proficient team members.</li> <li>· This rating may reflect developing skills and experience, and indicate that more training, coaching and/or support is needed to enable success.</li> </ul>
<p><b>Improvement Needed</b></p>	<p><u>Behavioral definitions:</u></p> <ul style="list-style-type: none"> <li>· The employee consistently performs below expectations or standards for the position.</li> <li>· What is produced, how it is produced, and mastery of competencies are not acceptable.</li> <li>· The employee inconsistently takes initiative to complete work and requires significant to moderate direction.</li> <li>· The employee’s ongoing performance must improve within a defined time frame to remain in the position.</li> <li>· <b>A Performance Improvement Plan (PIP) should be initiated, collaborating with Human Resources.</b></li> </ul>

## Performance Assessment - Ratings

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### Staff Rated as **Exceeds Expectations**:

- ✓ Recognized as a role model; and
- ✓ Willingly shares knowledge; and
- ✓ Takes initiative to go above and beyond expectations; and
- ✓ **Lead** change efforts, **identify** new opportunities and **champion continuous improvement** with significant positive impact.
- ✓ *Important: The use of an 'Exceeds Expectations' rating should be used sparingly and reserved for truly outstanding contributors who exhibit each of the behaviors above consistently throughout the review period.*

## Performance Assessment - Ratings

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### Staff Rated as **Successful:**

- ✓ Consistently demonstrates capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies.
- ✓ Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period.
- ✓ The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities.
- ✓ They consistently take initiative and generally require minimal direction.

## Performance Assessment - Ratings

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### Staff Rated as **Developing**:

- ✓ The employee achieves expectations in *some* areas and falls below in others.
- ✓ Actions and outcomes demonstrate inconsistent capability and/or effort or require significant guidance and support.
- ✓ This category may include new employees who may be evaluated against “learning the job” versus expectations for someone who has been at Brandeis longer.
- ✓ This rating may reflect developing skills and experience, and indicate that more training, coaching and/or support is needed to enable success.

## Performance Assessment - Ratings

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### Staff Rated as **Improvement Needed:**

- ✓ Consistently performs below expectations or standards for the position. What is produced, how it is produced, and mastery of competencies are not acceptable.
- ✓ Inconsistently takes initiative to complete work and requires significant to moderate direction.
- ✓ Ongoing performance must improve within a defined time frame to remain in the position.
- ✓ *Note: Contact your HR Business Partner and a Performance Improvement Plan (PIP) should be initiated.*

## Performance Assessment - Ratings

### Staff Rated as **Improvement Needed**:

- Please note: a **PIP** is necessary if there is an **overall rating of Improvement Needed**. Because the competencies are half of the weighting and the performance section is the other half, in total, an Improvement Needed rating is needed to initiate a PIP.

# WORKDAY

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## Using Workday for the Annual Review

### Complete Self Evaluation |←

Self Evaluation: Annual  
Performance Review (IC) -

Actions

07/01/2022 - 06/30/2023



Performance

Development Opportunities

Core Competencies

Goal Setting

Overall

Review and Submit

### Performance

Help Text Area

**Question** In this section, please evaluate and summarize your overall job performance against current year goals/objectives. Please include any particular accomplishments, objectives met and/or demonstrated strengths during this period in the comment box.

#### Employee

**Rating** \* Successful

**Rating Description** Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what it is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.

**Answer**

Format | B | I | U | A | : | | ↕

Comments Here

## Using Workday for the Annual Review

The screenshot displays the Workday Self Evaluation interface. On the left is a blue navigation sidebar with the following elements:

- Complete Self Evaluation** (with a left arrow icon)
- Self Evaluation: Annual Performance Review (IC) -
- Actions button
- 07/01/2022 - 06/30/2023
- Print icon
- Performance (selected)
- Development Opportunities
- Core Competencies
- Goal Setting
- Overall
- Review and Submit

The main content area is titled **Development Opportunities** and includes:

- A **Help Text Area** with a scroll bar.
- A **Question** box containing the text: "In the comment box, please identify 1-2 development opportunities for achieving your work objectives, job responsibilities and department goals. List specific areas for professional/career development that you would like to discuss with your manager."
- An **Employee** section with an **Answer** field. The answer field features a rich text editor toolbar with options for Normal, Bold (B), Italic (I), Underline (U), Text Color (A), Bulleted List, and Link, followed by a full-screen icon. The text area below the toolbar contains the placeholder "Comments Here".

## Using Workday for the Annual Review

### Complete Self Evaluation

Self Evaluation: Annual Performance Review (IC) -

Actions

07/01/2022 - 06/30/2023



- Performance
- Development Opportunities
- Core Competencies
- Goal Setting
- Overall
- Review and Submit

### Core Competencies

Help Text Area

4 Items

Competency	Description	Employee Evaluation
Professional Knowledge & Accountability	Demonstrates the desire and ability to produce timely high quality work. Focuses on results and desired outcomes and how best to achieve them. Action oriented, taking on new opportunities and tough challenges with a sense of urgency, high energy, and enthusiasm. Takes ownership of responsibilities and shows initiative. Demonstrates ability to adjust approach when needed in order to complete assigned projects and tasks. Uses time and university resources efficiently. Makes timely, informed decisions that consider the facts, goals, constraints, and risks. Anticipates potential problems and actively works to resolve them. Demonstrates commitment to professional development. Welcomes	<p>Rating <span style="color: red;">★</span></p> <p>× Successful</p> <p>Behavioral definition: The employee consistently achieves expectations. They demonstrate capable, effective, and satisfactory performance on both what is produced, how it is produced, and mastery of many competencies. Their ongoing performance meets and occasionally exceeds performance standards for the position throughout the review period. The individual is dependable, collaborative and productive. They are generally receptive to change and seek continuous improvement opportunities. They consistently take initiative and require moderate to minimal direction.</p> <p>Comment</p> <p>Comments Here</p>

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- Development Opportunities
- Core Competencies
- Goal Setting
- Overall
- Review and Submit

The main content area is titled **Goal Setting** and includes:

- Help Text Area with a scroll indicator.
- A **Question** field containing the text: "In the comment box, please outline goals and objectives for the next review period."
- An **Employee** field.
- An **Answer** field with a rich text editor toolbar (Format, Bold, Italic, Underline, Text Color, List, Link) and a large text input area.

## Using Workday for the Annual Review

### Attestation Section:

The screenshot displays two text input areas for acknowledgments. The top area is for the Employee Acknowledgment, and the bottom area is for the Manager Acknowledgment. Both areas include a rich text editor toolbar with options for bold, italic, underline, text color, bulleted list, and link. The text in both boxes is bolded.

**Employee Acknowledgment**

I acknowledge that my manager and I have reviewed and discussed the contents and evaluations of this performance review.

**Additional Confirmation:**

- The job description was reviewed and updated, or will be reviewed and updated in the near future, should changes be necessary.
- The year-end review has been fully completed.
- Ongoing check-in meetings have taken place or will be scheduled.

**Manager Acknowledgment**

I have reviewed and approved the contents and evaluations of this performance review.

**Additional Confirmation:**

- The job description was reviewed and updated, or will be reviewed and updated in the near future, should changes be necessary.
- The year-end review has been fully completed.
- Ongoing check-in meetings have taken place or will be scheduled.
- If the overall rating is Improvement needed, please reach out to your HR Business Partner.

# MERIT PROCESS PREVIEW

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## Determining Annual Merit Increases - **PREVIEW**

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- Eligibility: **Staff hired before April 1, 2023.**
  
- Process and Timing:
  - May 10: Annual merit cycle begins (Workday open).
  - May 10-24: 1<sup>st</sup> level Managers or salary planners enter increases in Workday.
  - May 24-June 5: HR prepares analytics; Divisional managers approve increases.
  - June 6-16: HR prepares analytics: Executive VPs approve increases.
  - June 19: Approval memo sent to Managers to communicate increases.
  - June 21: Approval notification memo sent to employees to print increases.
  - July 7 (hourly), July 14 (exempt): Increases reflected in pay.
  
- Training on the merit process to follow and includes guides and computer based training for managers and salary planners.

## Determining Annual Merit Increases - **PREVIEW**

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- Differentiate pay based on performance even within same rating.
  - Audited by HR.
  - Consider internal equity.
  - Allocate increases within budget.
  
- Consider internal equity.
  - Are employees doing jobs requiring similar skill, level, responsibility paid comparably considering their performance, qualifications, total related experience and service?
  - Is there pay compression with newer employees or supervisors?
  
- Allocate increases within budget
  - Approvals roll up to next level management.
  - Discuss out of budget proposals with next level management. Budget trade-offs may be made at higher levels.

## Helpful Resources

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- TAP Website
  - Deadlines
  - Information about TAP
  
- Training for Managers and Staff
  - Workshop dates
  - Registration links
  
- LinkedIn Learning Library of Videos
  - Curated content
  - Videos on topics and themes with practical tips
  
- Recommended Articles
  - *How to Conduct a Great Performance Review*
  - *How to Talk to an Employee Who Isn't Meeting Their Goals*
  - *Giving a High Performer Productive Feedback*
  - *The Key to Performance Reviews Is Preparation*
  
- Appendix
  - Included in this slide deck
  - Practical tips

## Resources - HR Business Partners

**Liz Tierney** [etierney@brandeis.edu](mailto:etierney@brandeis.edu)

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Senior HR Business Partner

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Senior HR Business Partner

## Thank you for your Active Participation Today.

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Manager Training Evaluation Survey:



# Questions?

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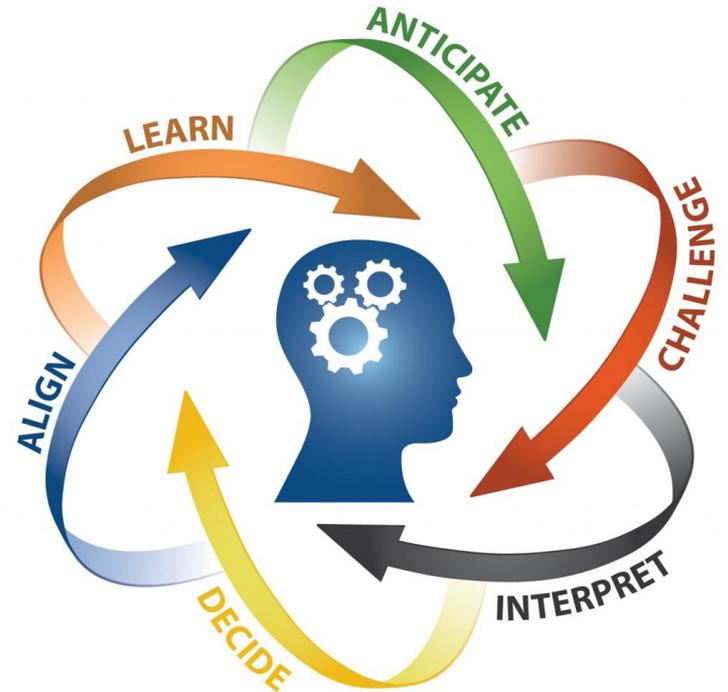
# APPENDIX

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## Why is Professional Development Important

- Sharpen skills
- Develop new skills
- Increased efficiency and effectiveness
- Show interest in their growth
- Brandeis offerings



## Ideas for Your Staff and Their Professional Development

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### ✓ Develop a new skill set

- Approach Manager for suggestions
- Common skills needed in your field
- Take advantage of existing resources:
  - LinkedIn Learning videos and try the skills testing feature
  - Training opportunities offered by HR and the EAP
  - Attend free lectures offered by Brandeis or elsewhere
- Work with your manager and suggest new approaches to increase efficiency while maintaining effectiveness

### ✓ Level-up your credentials

- Earn a certification
- Take a course
- Read books about your field
- Listen to podcasts on relevant topics

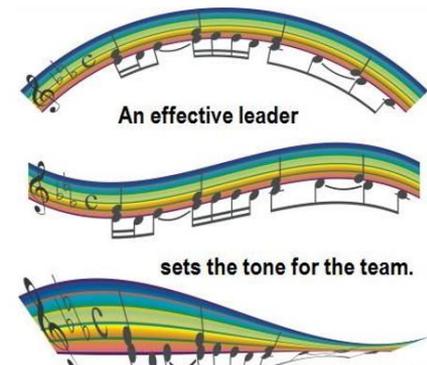
# CORE MANAGER RESPONSIBILITIES

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## Setting the Tone

- Promote a team culture where everyone feels valued
- Lead by example and model expectations
- Understand the roles of each team member
- Maintain good working relationships with your team
- Practice gratitude and understanding
- Remind team members of their valuable roles
- Provide the strategic vision of the organization, how their area and role connects to that vision



## Core Manager Responsibilities

- Keep communication lines open
- Be clear and concise
- Practice consistency on how you delegate work and monitor expectations
- Be open to answering questions
- Review their job description with them and share your expectations such as what “good” work looks like in their role
- Set realistic expectations, achievable goals and include some stretch goals as appropriate
- Provide on-going feedback on individual performance and goals
- Ensure projects are completed and deadlines are met
- Find out what is working and not working
- Track staff progress through routine check-in meetings
- Learn from staff any potential obstacles that may be barriers
- Sharpen your ability to have difficult conversations when necessary



## Team Development and Resource Stewardship

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- Developing Your Team
  - One-on-one meetings
  - On-the-job learning and training
  - Learning and training as a team
  - Formal learning and training through internal and external program offerings
- Organization
  - Maximizing existing resources
  - Responsible, judicious and ethical use of resources



## Be Available to Your Team

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- Shows that you care about how they are doing.
- If your staff know that you will always be there when needed, this can increase their trust.
- Avoid giving the impression you are too busy to talk with them about an issue.
- And if you are too busy at that moment, schedule time for a 1:1 meeting.



## One-on-One Meeting Tips

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- Schedule one-on-one meetings with your direct reports
- Decide on a cadence – weekly or bi-weekly
- Use a set of check-in questions designed to prompt conversation and updates
- Send a summary email if action items were agreed upon
- Document the meetings and what was discussed



## Tips for One-on-One (Check-in) Meetings

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### Dos

- Begin each meeting by sharing a win (creates positive energy)
- Notify in advance if you plan to touch on professional/career development
- Be curious (listen to concerns and provide suggestions)
- Mix up the format—f2f or Zoom

### Don'ts

- Cancel without rescheduling
- Be consistent (it's wise to have an agenda, but you should also be flexible)
- Forget to say “thank you” (it's important to show your colleague that you value them)
- Forget to check in on how they are doing—keep the door open to any concerns they might impact work/life balance

## Possible questions to ask in One on One meetings

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- How are things going?
- What have you been working on?
- Please update me on Project xyz.
- Are you on track to meet the deadline?
- What if any barriers exist that I can help with?
- What questions do you have?
- What challenges do you have?
- How can I provide support?



## Things to Remember

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- ✓ Set clear boundaries with your team
- ✓ You have to make tough decisions – it is part of your job
- ✓ Practice time management
- ✓ Be poised, stay calm under pressure and lead by example
- ✓ Stay positive – do the best you can and foster a positive, problem-solving mindset on behalf of the team
- ✓ Be consistent
- ✓ Seek out your resources – your leader and your HR Business Partner



## Tips for Sharing Positive Performance Feedback

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Expectation

“Sarah you are expected to make a 20-minute presentation to students every Friday about what services our office provides.”

Observation

“I’ve noticed that you are always well-prepared and arrive early to greet students and make them feel welcome. And your delivery of the presentation is energetic and positive.”

Assessment

“This is excellent and demonstrates a commitment to your job, representing our office positively and serving our students well.”

Consequence

“I’d like to use this as a model for how we conduct other presentations.”

## Tips for Sharing Areas of Improvement

Expectation	“Joe, one of your roles is to greet people as they enter our department and assist them with their questions.”
Observation	“I’ve noticed that you have taken 10 minutes or more to acknowledge people when they come in, you appear impatient, and your tone has not been welcoming.”
Assessment	“This is impeding our ability to work collaboratively with other departments and is impacting our customer experience and satisfaction.”
Consequence	“I need you to acknowledge people as soon as they walk in, and then help them as quickly as you are able to with a friendly and helpful tone. Let’s reevaluate in 2 weeks.”

## Tips for Addressing Performance Concerns

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- ✓ Be timely
- ✓ Be clear on what exactly the performance concerns are
- ✓ Memorialize the concerns and expectations to the employee
- ✓ Follow up with the employee and hold them/you accountable
- ✓ Consult with your HRBP or VP for guidance, support or advice

## What is good documentation?

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- Be timely, clear, concise and factual
- Just Do it
- Send meeting summaries after 1:1 and team meetings to ensure everyone is on the same page.
- For performance: It is important to document throughout the year to ensure proper feedback and expectations and will help with memory recall

# GOAL SETTING

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## Goal Setting Is

- Purposeful and focused approach
- Steps toward planning for the future
- Plays a fundamental role
- Target at which we aim our “arrow”
- Paves the way for success
- Leads to improved performance
- Powerful motivator
- Methodologies vary, choose the one that works best



*“Our goals can only be reached through a vehicle of a plan, in which we must fervently believe, and upon which we must vigorously act. There is no other route to success.”*

*Pablo Picasso*

## SMART Goal Methodology



## OGTM Goal Setting Method

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OGTM= Objectives, Goals, Tactics and Metrics

1

### Objectives

Set an objective.

2

### Goals

Streamline the objective into a tangible target.

3

### Tactics

Outline a small step that enables you to reach your goal.

4

### Metrics

How will you measure – data to tell a story about the extent to which the objective was achieved.

## Goal Setting Method OKRs = Objectives and Key Results



### Step 1:

**Targeted Objective**

Clear, concise objectives and can be quantitative and/or qualitative.



### Step 2:

**Key Results**

3-5 Measurable key results for each objective. Key results are typically quantitative benchmarks.



### Step 3:

**Initiatives**

Develop specific initiatives designed to reach key results.

## What to Consider When Choosing a Goal Setting Method

### The Five Principles of Successful Goal Setting



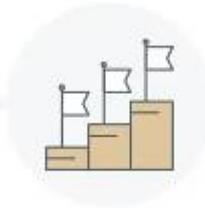
#### 1. COMMITMENT

Attachment  
to goal



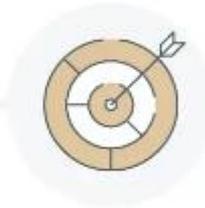
#### 2. CLARITY

Specificity  
of goal



#### 3. CHALLENGE

Degree of  
goal's difficulty



#### 4. COMPLEXITY

Degree of  
goal's demands



#### 5. FEEDBACK

Presence of  
progress reporting

*Source: Locke & Latham, 1990*

## Managing the Emotional Impact

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- Allow individuals to share their emotions
- Acknowledge their feelings
- Display patience and understanding
- Diffuse anger by remaining calm and staying with facts
- Crying and/or silence can be a typical response
- With prolonged crying/silence ask if they would like a few minutes in private
- Inform them of available resources
- If necessary, reconvene conversation at a later date