Setting S.M.A.R.T. Goals & Objectives
FOR MANAGERS

Setting individual goals or objectives is a fundamental ingredient for performance management and development. They are essential for establishing role clarity and alignment on the performance outcomes that need to be achieved – clarity for you as the Manager and each individual employee in your team. A key principle that underpins the approach of setting goals/objectives in the South Australian (SA) Public Sector is that managers and employees need to work in partnership with one another to be clear on and agree expectations.

What are S.M.A.R.T. goals and objectives?

The S.M.A.R.T. model is an established approach based on research into effective goal-setting which has been shown to help motivate and guide people towards enhanced performance. You can use this to help sharpen and clarify the individual goals and objectives of individual employees in your team.

Specific – make sure outcome of the goal or objective is described using specific and concise statements that say what needs to be done. Usually specific statements answer the five "W" questions:

What – what do you want to accomplish

Why – specific reasons, purpose or benefits of you accomplishing the objective

Who – who is involved

Where – identify a location

Which – identify requirements and constraints.

MEASURABLE –you will need to select appropriate measures that will help you know when the expectation has been met, measures that you can monitor and report on along the way, which demonstrate that the goal or objective has been accomplished. Define a measurable outcome rather than just inputs and processes. Measures can be expressed as:

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- Quantity – i.e. how many, or what volume

- Quality – i.e. how well

- Milestones – i.e. particular markers achieved on time

- Cost – i.e. within budget.

ACHIEVABLE – the goal or objective needs to be an achievable expectation based on the individual circumstances, capability time and resources available to the employee. In judging whether it is achievable you may need to consider operational factors such as the "business-as-usual" workload, external demands from stakeholders, and availability of input and support from others. Other inputs that may help you establish how achievable the outcome is could include:

- Your previous experience of working on similar goals/objectives or direct observations of others who have

- Observations of other achievements the employee has had made in the past

- Baseline measures or benchmarking that has been established over time

RELEVANT – the goal or objective needs to be relevant to the context of the agent and that of the individual employee. Ideally this provide a clear line of sight and linkages between:

- corporate goals or objectives,

- your team's goals or objectives (and your individual goals or objectives as their Manager),

- the scope of the employee's specific job role as outlined in their role description

- matched to the individual employee's personal strengths and level of experience, and

- in line with the employee's development and career plans where possible.

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TIME REFERENCED – the goal or objective needs to have a clear deadline or timeframe for delivery. This is normally expressed by a date, time period or frequency for completion. Being able to link this back to existing reporting cycles and mechanisms can be helpful, such as project meetings, monthly reporting, other key events in your agency's annual calendar. It is good practice to specify progress reviews and check-points to help track progress along the way rather than just at the end.

KEY BENEFITS OF SETTING S.M.A.R.T GOALS & OBJECTIVES

- Provides focus, helping employees avoid becoming distracted by other activities and increasing the likelihood of achieving the right outcomes
- Makes it easier to track and assess performance along the way, with clear indicators of progress
- Clarifies performance expectations and priorities so employees understand what outcomes need to be achieved and how they need to approach these
- Allows people to see the connection between their individual contribution and the broader aims of the agency.

When to set review goals and objectives

While there are some key points of the annual performance cycle, such as formal reviews at least twice a year, where you need to take stock of goals and objectives, they are a tool which can be used at any time to help track progress or re-focus efforts. Some typical situations where you might do this include:

- At the beginning of your agency's annual planning cycle, so that priorities flow from the strategic/business plan, through to operational plans, and then each individual's priorities
- When a new employee joins your team, within the first 90 days of joining the agency
- In response to changes being implement which impact on priorities of your team and the individual employee's areas of focus
- In response to changes in the individual employee's personal situation that you identify through regular conversations, where this is appropriate

Agreeing goals and objectives

Employees and Managers need to work together in establishing individual goals and objectives so they meet agency priorities. To build joint commitment to these, it is better for both parties to have input into drafting them so there is context from the Manager and individual ownership from the employee. You both need to be comfortable and confident that they are appropriate and can be delivered. Investing time into clarifying this with each other up-front helps to build mutual understanding of performance expectations.

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Information Sheet

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What about when things change?

Change is happening all the time and you can't necessarily plan for everything. You will need to be flexible in recognising the implications of change on performance goals/objectives for employees in your team and revisit them when necessary. There may be some goals/ objectives that are no longer relevant, and some new ones which need to be captured and tracked through to completion. It is good practice in performance management and development to keep goals or objectives "live", assessing them regularly, and adapting them as they are achieved or as priorities in the agency change. This is important in order to make the agency agile in response to the changing environment it operates in, and also in recognition of how individual circumstances for employees can also change.

Example S.M.A.R.T. Objectives

POORLY DEFINED OBJECTIVES

Answer phone calls promptly

Complete PDP discussions with staff

Contribute to the continuous improvement of the team's output

Provide efficient customer service

Deliver policy project

S.M.A.R.T. OBJECTIVES

Answer all in-bound phone calls to the office within an average of 50 seconds as measured by the call management system and client satisfaction reports, by 30th of June next year, in a professional manner as outlined in the customer service standards.

100% of PDP discussions are complete for all team members by 30 Septembert next year, as measured by the annual report on PDP participation, supported by feedback in the PDP questions in the employee engagement survey and mid-year sampling of PDP documents.

Participate in identifying opportunities for continuous improvement by identifying at least one area where reduction in re-work will result by 28 February next year as measured by quality standard reporting.

Until next February, complete an average of 80 customer transactions per day, with no errors at 4 minutes average handling time, in line with the Customer Service Principles.

By 30 September, scope the new policy project using the departmental project management tools and prepare a presentation for the stakeholder group outlining the key benefits and resource requirements.

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KEY POINTS

- Investing time into setting S.M.A.R.T. goals and objectives helps to clarify performance expectations and provide focus throughout the performance year
- You will need inputs both from broader agency plans and from the individual employee in order establish appropriate goals and objectives
- It is important that Managers and Employees work in partnership together to set goals and objectives so they are genuinely agreed and there is mutual commitment to achieving them
- There are some key points in the annual performance cycle to set and review goals and objectives, but they can be assessed and adapted at any time to reflect changes that occur.