Values-Based Goal Setting Form Instructions

INTRODUCTION

As important as **WHAT** we pursue (our goals), is **HOW** we pursue them (our values). As you plan your goals for this year, it's important to first think about how you will demonstrate your commitment to Georgia Tech's values within those goals. When there is a reference to "we", it is an inclusive "we" and applies to every member of the Georgia Tech community – our students, faculty, staff, alumni, and affiliates. No matter the role, these values are meant to guide our priorities every day, to help us focus on our important, shared mission. Below are the nine (9) strategic values of Georgia Tech.

Students are our top priority - We are educators first and foremost, committed to developing leaders who advance technology and improve the human condition. We measure our success by the achievements of our students and the impact of our graduates in improving the lives of others.

We strive for excellence - We strive to be among the best at what we do and to set high expectations for each of us individually and for our community as a whole. The expectation of excellence, which is instrumental in our ability to have a meaningful impact in the world, extends to our teaching, our research and creative endeavors, our athletic programs, and our operations.

We thrive on diversity - We see diversity of backgrounds and perspectives as essential to learning, discovery and creation. We strive to remove barriers to access and success and to build an inclusive community where people of all backgrounds have the opportunity to learn and contribute to our mission.

We celebrate collaboration - We enable and celebrate collaboration across disciplines and perspectives, between units and departments, and with other organizations at home and around the world. We value the contributions of all members of our community, promote civil and respectful discourse, and help one another succeed.

We champion innovation - We inspire, empower, and provide the resources and environment for innovative ideas and solutions to flourish. We welcome new concepts and approaches that lead to creative ideas and solutions.

We safeguard freedom of inquiry and expression - We protect the freedom of all members of our community to ask questions, seek truth, and express their views. We cherish diversity of ideas as necessary for learning, discovery, scholarship, and creativity.

We nurture the well-being of our community - We strive to build a healthy and vibrant environment that helps our students and every member of our community

grow holistically and develop the self-awareness, knowledge, and practices necessary to pursue healthy, purposeful, fulfilling lives.

We act ethically - We hold one another to the highest standards of professional and ethical conduct. We are transparent and accountable and strive to earn and maintain the public trust.

We are responsible stewards - We are careful stewards of the resources we are entrusted with and strive to be an example of sustainability, efficiency, respect, and responsibility.

HOW TO SET YOUR VALUES-BASED GOALS

When setting goals for the year, be sure to list *goals* versus *expectations*.

Expectations:
Expectations are the desired behaviors you want to exhibit. Some common examples of expectations are:

- o *Be consistently on time.*
- o *Follow proper call out procedures.*
- o *Complete assignments in a timely manner.*
- o *Maintain professional standards in the workplace.*

Goals:
Goals are objectives to be accomplished throughout or by the end of the appraisal period. When creating goals, think about some performance goals that you would like to strive to attain that also relate to Georgia Tech's values. Then think about how you might be able to reach those goals and use the **S.M.A.R.T.** goals format. **S.M.A.R.T.** goals are:

- o **S**pecific - Clearly state the expected outcome (what is to be accomplished).
- o **M**easurable - Provide the metrics to measure completion.
- o **A**chievable - Identify goals (and deliverables) that are capable of being met.
- o **R**elevant - Describe the desired changes, improvements, or output that is pertinent to your position and organizational/departmental objectives.
- o **T**ime Based – Identify interim milestone dates and a final completion date.

Any goal can be turned from a regular goal to a **S.M.A.R.T.** goal. See the example below.

Original Goal	S.M.A.R.T. Goal
Create a system to track grants.	Create a system log using Excel to track grants so they can be sorted. Report them by at least source, date, and amount. System log to be completed by the end of December 2021.

How do you turn a S.M.A.R.T. goal into a Georgia Tech Values-Based goal? Start by identifying one or more Georgia Tech values and include it in your S.M.A.R.T. goal format. See the example below.

S.M.A.R.T. Goal	Values-Based S.M.A.R.T. Goal
Create a system log using Excel to track grants so they can be sorted. Report them by at least source, date, and amount. System log to be completed by the end of December 2021.	Value(s) Chosen: 1. **We celebrate collaboration.** 2. **We champion innovation.** Create a system log using Excel to track grants so they can be sorted. Report them by at least source, date, and amount. System log to be completed by the end of December 2021. **Collaborate** with OIT to use the Excel spreadsheet as a blueprint to create an **innovative** grants system log that will help drive transparency and produce more timely and accurate reporting.

When crafting your goals, you can use the same values for multiple goals. See the example below.

S.M.A.R.T. Goal	Values-Based S.M.A.R.T. Goal
By mid-March 2021, create a new goal setting template working with multiple partners across the Institute that tracks the progress of employees' goals to the strategic values of the Institute.	Value(s) Chosen: 1. **We celebrate collaboration.** 2. **We champion innovation.** Create an **innovative** process that tracks the progress of employees' goals to the strategic values of the Institute. Develop a form/template by January 27, 2021. **Collaborate** with Strategic Consulting and GTHR-Employee Engagement to develop a values-based goal setting form, as well as collaborate with OIT to place the form in a DocuSign format by February 1, 2021. Roll-out Institute-wide before March 1, 2021.

While you can choose multiple values, you can also select **just one** that will be reflected in your goal. See the example below.

S.M.A.R.T. Goal	Values-Based S.M.A.R.T. Goal
Strive to be an example of sustainability, efficiency, and responsibility by reducing Area 3 Shop supply purchasing costs by 5% by the end of December 31, 2021.	Value(s) Chosen: 1. We are responsible stewards. In an effort to be a **responsible steward** of the resources I have, I will strive to be an example of sustainability, efficiency, and responsibility by reducing Area 3 Shop supply purchasing costs by 5% by the end of December 31, 2021. I will audit Shop supply spending by March 5, 2021 and create a spreadsheet with all shop supply items by April 15, 2021. I will meet with shop employees, identify unnecessary supplies and prioritize supplies to cut by June 30, 2021. I will monitor monthly spending and submit monthly spending reports to my manager by the 5th day of the next month. Supply spending will be compared to budgeted restrictions on December 31, 2021.

Qualitative goals can also be made into values-based S.M.A.R.T. goals. See the example below.

S.M.A.R.T. Goal	Values-Based S.M.A.R.T. Goal
Conduct two hiring selection processes for administrative assistants by August 31, 2021 that incorporate best hiring practices and provide consistent, clear criteria and unconscious bias training for every search committee member.	Value(s) Chosen: 1. **We strive for excellence.** 2. **We thrive on diversity.** 3. **We act ethically.** Conduct two hiring selection processes for administrative assistants by August 31, 2021 that incorporate best hiring practices (**striving for excellence**), by ensuring **ethical** behavior by providing consistent, clear criteria and unconscious bias training for every search committee member. Also, the search committee will be **diverse** and I will work with Talent Acquisition to have a diverse candidate applicant pool.

Although using Georgia Tech's values within your goal can help you focus your objectives, it is not required. See the example below.

S.M.A.R.T. Goal	Values-Based S.M.A.R.T. Goal
Create a professional development program in spring semester for 20 students within our research lab that will include opportunities for shadowing, training, and professional engagement, culminating in a chance for all students to provide constructive feedback and evaluation of the program.	Value(s) Chosen: **1. Students are our top priority.** By March 1, 2021, establish a four-week program which allows students to shadow at least two (2) senior research employees within their lab. After shadowing the senior research professional, student employees will draft a memo detailing their experience and identifying possible areas of improvement within their lab. Beginning on May 1, 2021, provide student researchers with development and training opportunities. Upon completion of training, managers meet with students to discuss what was gained from the experience. Establish that all managers are to meet with their student direct reports for weekly check-in calls or meetings by April 1, 2021.

YOUR ROLE IN SETTING VALUES-BASED GOALS

Employee's Role:
As the employee, your role is to start the goal setting process. Complete your values-based S.M.A.R.T. goals. When creating your goals, think about the following:

- How does the goal advance *Georgia Tech's* strategic goals?
- How does the goal advance the *department's* strategic goals?
- Do I have the resources to complete this goal?
- Can the goal realistically be accomplished within a specific time period?

Upon completion, meet with your supervisor to discuss your goals and how they support the department's and Georgia Tech's strategic objectives. In some instances, your supervisor may advise that a goal may need to be changed or tweaked to better fit the department's and Georgia Tech's strategic vision and mission.

Supervisor's Role:
As the supervisor, your role is to <u>constantly</u> and <u>consistently</u> review the employee's goals and discuss progress on a <u>quarterly</u> basis. When reviewing and discussing the employee's goals, think about the following:

- Before approving the goal, does the goal advance Georgia Tech's/department's
- strategic goals?
  - If not, the goal should be changed or tweaked.
- What are some ways to help the employee break things down into small steps?
- How can you celebrate the employee's progress along the way?
- How can you show your employee that you care about their goal?
  - Use motivation (encouragement) and employee development (training).
- In quarterly one-on-one meetings with the employee, ask are there any barriers
- or challenges that are preventing the employee from meeting the goal?
  - Discuss with the employee how to remove the barrier/challenge and provide assistance if it is in your purview to do.
- Can the goal realistically be accomplished within the specified time period?
  - If not, meeting on a quarterly basis to track progress allows for you and the employee to update or amend a goal, how it will be accomplished, and the time period for completion when uncontrollable circumstances occur.

After the first meeting with the employee, both you and the employee will sign the values-based goal setting form.