How to Set and Develop Performance Goals

Performance Management
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Reflection

“If you don’t know where you are going, any road will take you there.”

Alice in Wonderland
Objectives

Be able to:

• Describe the benefits of setting goals
• Describe how goals should align with Trinity Health’s Mission, Vision, and Core Values
• Construct/write SMART Goals
• Prioritize goals based on the weights assigned to each one
• Give feedback on performance goals
Benefits of Setting Performance Goals

- Help provide focus so that we strive for and accomplish tasks during a performance period.
- Are powerful tools that provide a path to align individual efforts with the team as well as the organization's strategy.
- Can be effectively measured as they are accomplished (especially SMART goals).
- Enables you to clarify with other people what you are trying to do, and therefore helps identify what is needed from others to successfully complete the goal.
- Create a focused set of intentions and desires, when thought out and stated.

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Aligning Our Goals
Our Goals Should Align with...

Our Mission
We, Trinity Health, serve together in the spirit of the gospel as a compassionate and transforming healing presence within our communities.

Our Vision
As a mission-driven innovative health organization, we will become the national leader in improving the health of our communities and each person we serve. We will be the most trusted health partner for life.

Our Core Values
- Reverence
- Commitment to those who are poor
- Justice
- Stewardship
- Integrity
Goal Setting & Alignment

Goal setting, check-ins, mid-year reviews, and self-assessments create an atmosphere of trust, clarity and encouragement...with fewer surprises; and helps colleagues to perform at a higher level.

Performance Management Process

Recommended that each colleague have a minimum of two (2) check-in’s per annual evaluation year.
SMART Goals
Use SMART Goals: What Are They?

SMART is an acronym used to make sure your goals are as effective as they can be.

**Specific:** Be clear about what is to be done.

**Measurable:** How will you prove or demonstrate the goal?

**Achievable:** Is it realistic and within reach?

**Relevant:** Is it within the scope and aligned to an organizational goal?

**Time Bound:** Do we know when it must be done?

SMART goals have been found to be a very effective method of motivating colleagues to perform at peak levels.
An Example of a SMART Goal

• Improve this year's *project completion on time* average to 80%, from last year's average of 60% by the end of this fiscal year.

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SMART Goals are Measureable

- Some performance goals, such as those to develop "leadership skills" or to work on "customer service" techniques may not be easily measured with a number.
- Even if they could, numbers on their own may not tell the entire story.
- This is where quantitative and qualitative data is helpful.
Quantitative & Qualitative Measurements

Measuring Goals

Quantitative Measurements

- Think quantity
- Hard data
  - Metrics, dates, scores, costs

Success

Qualitative Measurements

- Think quality or qualify
- Add meaning to quantitative measurements
  - Customer or employee feedback, personal opinions
Quantitative Data

• Think "quantity."
• Quantitative data is anything that can be represented using a number. This is the "hard data."
  • Metrics
  • Dates
  • Percentage points
  • Test or survey scores
  • Costs
  • How long something takes to complete, etc.
• These are typically easier to measure than qualitative data.
Qualitative Data

- Customer or colleague feedback is an example of a type of qualitative data.
- This can be formal such as patient comment cards or informal such as someone telling you a story about something that happened earlier in the day.

“Sue did a great job when she discussed his diagnosis with a patient.”
Prioritizing Goals
Prioritizing Goals

- Prioritizing or ranking of goals gives us information to make decisions on:
  - Allocating our time and
  - Resources (and there may be other factors that may impact making those decisions)

- Prioritizing goals helps both the leader and the colleague determine how to spend time.

For example:
- 40% of time on TIS Project
- 26% of time providing answers to patient billing questions
- 24% of time improving customer service scores
- 10% reducing patient billing errors

The percentages will total 100% when added together.
Limit the Number of Goals

• Set a few key goals (less than 5).
• Don’t be excessive, reduce the list down to essential goals only.
• Research shows too many goals can actually lower performance.
• Include both long-term and short term goals in the mix.
Coaching & Feedback
Guidelines for Effective Performance Coaching

- Be specific and sincere
- Separate the positive feedback from the development feedback
- Tailor your feedback to the colleague and context
- Script out the opening of the conversation
- Provide undisputable facts and data

- Be present during coaching interactions
- Use “I” statements rather than “you” statements
- Seek to gain agreement from the colleague to the “gap” in performance
- Take the colleague to the higher ground: Mission, Core Values, and Vision
- Anticipate challenging situations
Feedback

Feedback is necessary to monitor a colleague's progress. When feedback is not present, a colleague does not know their progress.

Feedback is also increasingly important in a changing environment. As our organization changes, goals need to be reviewed and modified to support changes in organizational needs.
Giving Feedback

• Behaviors:
  • Observable and objective behavior
    - Something a person does or says

• Developmental feedback:
  • Best given before the next performance
  • Should be given in private

• Positive feedback:
  • Best given immediately after the performance
  • Can be given in public

• Results:
  • Measureable organizational, work group or individual goals
Appendix
**Quick Reference Guide: Coaching and Performance Management**

**Guidelines for Effective Performance Coaching**
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**Performance Coaching Skills**

**Key Outcomes**
- Encourage colleagues to take responsibility for improving their performance
- Build colleagues competence, confidence, and commitment to Mission, Core Values, and Vision

**Key Skills**
- Model appropriate behaviors and skills
- Monitor colleagues’ performance
- Meet colleague to provide feedback and encouragement

**Goal Setting**
- **Specific**: Be clear about what is to be done.
- **Measurable**: How will you prove or demonstrate the goal?
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**Giving Feedback**

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# Coaching Conversations Outline

## Opening: Script out how you will open the conversation with the colleague.
Create a tone of positive intent. Make sure the colleague is ready to receive the feedback.

## Body: Establish expectations. Stay focused on the agenda of the conversation.
Ask questions to involve the colleague.

### 1. Goal Setting and Expectations
- Cascade/Align SMART organizational and/or team goals
- Work with the colleague to independently draft SMART goals and expectations
- Reach agreement on the goals and expectations
- Check-in at least quarterly

### 2. Positive Feedback
- Be specific, sincere and brief
- Types of positive feedback include: Direct, indirect, and formal

### 3. Developmental Feedback
#### Observing Performance
- First, ask the colleague to assess their performance on what was done well
- Ask for specifics on results and behaviors
- Next, talk about opportunities for improvement
- Make follow up plans and clarify how you can provide support

### 4. Developmental Feedback
#### Performance Gap
- Do a preliminary analysis on the gaps, causes, options, and plans
- Deliver coaching in the same format as Observing Performance
- Reach agreement on specific plans for closing the gap

### 5. Mid-Year/Annual Review
- Review colleague self-assessment information
- Review client feedback
- Determine ratings and supporting data
- Share with colleague during formal meeting
- Ask colleague for understanding
- Discuss, reach agreement, and make future plans for development