Setting & Achieving Goals with Adaptability

*This is a companion job-aid for the recorded learning session linked here.*

To get started, review the Achieve Together key features.

**Achievement Criteria**
- Achieve Together includes new guidelines for all non-represented employees and managers/supervisors called the Achievement Criteria.
- There are five (5) performance indicators; collaboration, goal accomplishment, inclusion & belonging, innovation, and job mastery.
- Visit the [Achievement Criteria page](#) to learn how to use the document to discuss, plan, and evaluate performance based on the five (5) indicators among three levels of performance: Needs Attention, Well Done, and Stand Out.

**Check-in Conversations & Coaching Model**
- Achieve Together includes three (3) check-in conversations. These are conversations between managers/supervisors and direct reports.
- Check-in conversations include six (6) guided starter questions that help us discuss:
  - Current and future work expectations for the five (5) performance indicators in the Achievement Criteria, including collaboration, goals, inclusion & belonging, innovation, and job mastery.
  - Accomplishments, what's going well, and areas for improvement, and professional development planning.
- Be sure 1:1 meetings are scheduled with repetition between Achieve Together check-in conversations to revisit expectations, respond to changing priorities, discuss progress, exchange feedback, and refine strategies for success.
- Visit the [check-ins page](#) to learn the recommended steps for before, during, and after conversations.
- Making a plan to address current and future work is key! Use the [coaching model](#) and [Growing as a Coach toolkit](#) to prepare.

**Goal Setting Includes More Flexibility**
- Goals can be set for any length of time (1mo, 2mos, 4mos, 1yr, 2yrs).
- Managers are responsible for managing performance, including assigning goals that align with unit priorities, are clear, time-bound, measurable, actionable, and attainable (though a challenge).
- Goals are revisited in ongoing 1:1 meetings to discuss progress and refine goals as priorities change.
- Goal outcomes and updates to goals are documented in three (3) Achieve Together check-ins.
- At any time, non-represented employees will have 1 professional development goal (new knowledge, skills, experiences, or activities for career growth), with the remaining 2-4 goals focused on job accountabilities, special projects, challenging/stretch assignments, or broader contributions to Cal.
- Check out the Achieve Together goals page to learn more about [goal setting](#).
Use the UC Berkeley coaching model to navigate conversations about future work.

**Discover → Explore → Plan → Act**

Great coaches ask great open-ended questions, guide and partner, encourage and enable ongoing growth.

Highly coachable people seek feedback, take responsibility for their performance, and embrace better ways of working.

Use the [coaching model](#) for conversations about performance, feedback, problem-solving, and professional development.

The model gives everyone a framework to explore and discover opportunities to make action plans for expectations; whether it be about collaboration, goals, inclusion & belonging, innovation, or job responsibilities.

### Setting goals with adaptability

**Priorities of teams will vary.**

Through regularly checking-in on priorities, we strengthen Cal’s ability to maintain excellent results.

**Everyone must understand current and shifting priorities.**

Teams should understand what they need to be working on, and how they can continue growing and developing in their roles as priorities change.

**When goal setting, identify multiple strategies for achievement.**

Outline expected outcomes for quick shifting when priorities change. Creating variable deadlines strengthens the ability to be prepared when work needs quickly change. Use the [Achievement Criteria](#) to discuss and plan for what work will happen and how it will be conducted.

Goal updates should be reflected as priorities change. Documenting updates to goals (now and when the dashboard launches in late June 2020).

**Invest in meaningful conversations with individuals and team, focus on ways to improve the relationship, and recognize the direct impact of the work. Take time to celebrate achievements, and coach for resiliency.**
Refining goals checklist

- Can it be readily understood by those who must implement it?
- Is it measurable and verifiable?
- Is the objective a realistic and attainable one that represents a challenge?
- Does it relate to the roles, goals, mission of the unit?
- Is it consistent with basic organizational policies and practices?
- Does it include deadlines?
- Will the outcome justify the expenditure of time and resources required?
- Can accountability for outcome be clearly established?

Resource and support guide

<table>
<thead>
<tr>
<th>Description</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Effective &amp; Meaningful Remote Performance Conversations</td>
<td>Recorded Zoom microlearning session (video &amp; audio)</td>
</tr>
<tr>
<td>Effective &amp; Meaningful Remote Performance Conversations</td>
<td>Recorded Zoom microlearning session (audio only)</td>
</tr>
<tr>
<td>Achieve Together: Ask Us Anything</td>
<td>Event</td>
</tr>
<tr>
<td>Book 1:1 performance coaching/consulting session</td>
<td>Support sessions</td>
</tr>
<tr>
<td>Learn about Achieve Together Key Features: Check-in Conversations, Coaching, Goals, and the Achievement Criteria</td>
<td>Achieve Together webpages</td>
</tr>
<tr>
<td>People &amp; Organization Development Curated Tools Relevant to COVID-19 (view managing remotely)</td>
<td>UC Berkeley curated resources</td>
</tr>
<tr>
<td>What strategies do you consider when planning/achieving goals in uncertain conditions?</td>
<td>&quot;Ask the People &amp; Organization Development Experts&quot;</td>
</tr>
<tr>
<td>Remote Coaching &amp; Developing Performance</td>
<td>UC Berkeley curated LinkedIn Learning collection (videos &amp; training)</td>
</tr>
<tr>
<td>Setting and Achieving Goals with Adaptability</td>
<td>UC Berkeley curated LinkedIn Learning collection (videos &amp; training)</td>
</tr>
<tr>
<td>Managing/Coaching Remote Employees (Gartner - Manager/Supervisor Guide)</td>
<td>Slide deck</td>
</tr>
<tr>
<td>Employee Guide: Working on a Virtual Team (Gartner)</td>
<td>Slide deck</td>
</tr>
</tbody>
</table>