The G.O.A.L. Cycle

The Generating Ongoing Achievement and Learning (G.O.A.L.) cycle is a continuous and evolutionary process that aids managers and staff to utilize the G.O.A.L. program. The cycle:

- Translates corporate goals into individual, team and departmental goals
- Relies on consensus and cooperation rather than control or coercion
- Creates a shared understanding of what is required and how it will be achieved
- Requires an open and honest management style and two-way communication
- Encourages self-management
- Requires continuous feedback
- Calls for managers to provide direction and support

Learn more about each element of the G.O.A.L. cycle below.

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Setting the Context

To manage, rather than simply review staff performance, our G.O.A.L. program was designed to include:
• Individual goals and objectives that are directly linked with organizational priorities at the university and department level
• Clear behavioural standards such as ownership, respecting team members, and managing conflict
• Year-round support for staff needs and professional development
• Measures to ensure commitment from all managers and staff

G.O.A.L. is composed of five key interconnected elements: University & College Mission & Goals; Individual Success Criteria; the Performance Planning Dialogue; Continuous Communication, Support & Coaching; and Performance Reviews. Each of these elements are illustrated and described below.

University & College Mission & Goals

The University sets the strategic priorities through a multi-year integrated planning process. These plans are available at the Integrated Planning webpage through the Office of the Provost and Vice-President (Academic). This initiates the first step of the G.O.A.L. process, known as "cascading" in which priorities are shared at each subsequent level in the organization, right down to the individual.

The cascade model sees:

• Management of the University set strategic priorities and goals (see the Integrated Planning webpage)
• Divisional heads develop division objectives aligned with University strategic priorities and goals
• Individual unit managers prepare goals to achieve divisional objectives
• Individual staff set objectives and personal development plans to achieve unit goals

Establishing Individual Success Criteria
Individual success criteria includes the planning and articulation of goals, competencies, expectations and feedback, each of which are described below.

**Goals & Objectives**

Goal setting is the process by which an individual staff member and their manager identify and agree on their priorities and goals for the year, along with the key initiatives they will undertake (objectives), and the target for identifying successful accomplishment of each goal (a measure).

A goal is a priority area of a job where staff should be spending time, focusing energy, and getting results. These are the high priority areas where the organization needs to focus on to be successful in order to achieve agreed upon results.

For example, a staff member might have the goal of reducing costs at the cattle barns or increasing customer satisfaction with purchased plant stock. However, the goal does not say how the costs will be reduced in the coming year, nor by how much. This is the role of objectives. Objectives describe specifically what that staff member is going to do to achieve the goal that has been set for the coming year.

Priority goals and related objectives are not day-to-day responsibilities. Ongoing job responsibility goals capture the day-to-day responsibilities not reflected in other priority goals. Day-to-day responsibilities are reflected in the Job Fact Sheets.

**Competencies**

Goals and objectives reflect results. Results are the “what” of the work situation that managers and staff are expected to achieve in their work and are derived from the job fact sheets and cascaded down from organizational goals and objectives.

Competencies identify “how” people are expected to achieve these results. They are guidelines that determine what good performance looks like in behavioural terms.

In the example above, a goal was to reduce costs. A competency for the same staff member could be team work. Team work could be defined as working effectively with others to achieve common goals. Indicators of team work behaviour include:

- Accepts input and ideas from all team members in building a mutual commitment to team goals.
- Involves everyone affected by the problem to generate the solutions.
- Looks for ways to collaborate with other functions and teams across the unit and the University to achieve common goals.
- Actively supports and promotes the decision of the team externally even if they are not in personal agreement with the team solution.
- Provides clear direction and feedback and the necessary resources to facilitate effective
teamwork and results.
  
- Celebrates teamwork by recognizing and rewarding achievement by team members.

**Expectations**

Of the many factors which can influence an individual's performance on the job, one of the least understood is that of managerial expectations. Mounting evidence suggests that a manager's expectations are key to staff's performance and development in the workplace.

In the workplace we find that some supervisors seem to be able to get the best from their staff, while others get much less than the staff is capable of achieving. The question is why?

The answer, in part, is that staff behaviour is determined, to a great extent, by their “perception” of their environment, in which the supervisor is of particular significance. The supervisor's behaviour, in turn, is subtly influenced by what they expect of staff.

In the process of setting performance expectations with individual staff, factors to keep in mind are:

- Expectations must be perceived by staff as realistic and attainable before they can be translated into performance.
- No motivation or response is aroused when the goal is perceived as being virtually certain, or virtually impossible, to attain.
- Indifferent and non-comittal treatment, more often than not, communicates low expectations and leads to poor performance.
- The early years in an organization, when individuals can be strongly influenced by supervisory expectations, are critical in determining future performance and career progress.

**Feedback**

The purpose of giving feedback is to produce a positive change in behaviour or to continue a positive existing behaviour. While it might be generated by events from the past, it should nevertheless focus on the future.

Giving feedback says, “I care; what you do matters to me”.

Useful feedback is:

- Descriptive more than it is evaluative
- Specific rather than general
- Considerate of the needs of both the giver and the receiver of the feedback
- Directed toward behaviour which the receiver can do something about
- Solicited rather than imposed
- Well-timed, offered promptly, without procrastinating
- Checked out to ensure clear communication

**Performance Planning Dialogue**
Held on an annual basis, the Performance Planning Dialogue provides an opportunity to establish specific performance expectations and work goals and to review the position.

The Performance Planning Dialogue is a key mechanism to communicate priorities for the year and ensure everyone works toward achieving them. This takes place during the last quarter of the year in preparation for the new year and should be recorded for future reference.

To complete this stage effectively, the manager first shares the goals and objectives for the year with their team of staff. Each staff member then drafts their own goals and objectives based on those of the manager.

Next, the manager and staff need to meet to review the goals and objectives, make any necessary adjustments, and indicate their agreement to the work plan for the coming year.

At least one week in advance of their meeting, the staff member needs to provide the manager with their draft goals and objectives. This will allow the manager to fully review and consider the staff member’s ideas.

When the manager and staff meet, it should be at a time when both have had a chance to prepare, there are no distractions, and they have allowed ample time for a thorough review and discussion. The ultimate goal of this discussion is to support the staff’s success in the job.

Brown University, using benchmarking studies and informal and formal feedback sessions, identified the following practices as having the greatest impact on improving individual performance:

- Fairness and accuracy of informal feedback;
- Risk taking;
- Emphasis (informal and formal) review of strengths and areas for development;
- Staff’s understanding of performance standards;
- Internal communication;
- Supervisor knowledgeable about performance;
- Opportunity to work on the things you do best; and
- Feedback that helps staff do their jobs better.

All of these are integral to the Performance Planning Dialogue and to the G.O.A.L. cycle throughout the year.

**Continuous Communication, Support & Coaching**
Over the course of the year, it is important to provide continuous communication, support and coaching to staff regarding their progress and performance. Throughout the year managers and supervisors should:

- Share performance feedback from peers, clients, direct reports and self to provide staff with supplemental information
- Recognize staff's contribution
- Celebrate excellence
- Identify areas for learning and development
- Identify barriers to performance and actions to overcome or eliminate barriers

Coaching is a process for helping individuals and teams maximize potential. It is a set of beliefs and attitudes; a way of eliciting the best performance possible from individuals on your team. It is a process that lets people know what they do matters to you and opens up new possibilities for action, as well as increasing awareness for the person being coached and faster movement towards their goals.

Successful coaching requires tailoring the coaching process to fit the individual's learning needs and style. Behavioural change does not always occur on the first try; you have to encourage risk-taking, not punish initial mistakes.

**Performance Reviews**

**The Mid-Year Review**

In addition to providing relevant, ongoing feedback to staff, the manager provides more formal feedback by way of the mid-year review.

It’s an opportunity to discuss progress on goals and demonstrated behavioural competencies and make any necessary adjustments to the Performance Plan based on changing circumstances. This discussion should take place in a quiet, private place where other distractions are eliminated.

The mid-year review allows the individual staff member to get an idea of how well they are seen to be performing against the agreed-upon goals and competencies, and whether any corrective action needs to be taken at this stage of the G.O.A.L. cycle.

Corrective action may include investing more time and effort into a particular area, renegotiating a timeline or, in some cases, rewriting an aspect of the plan based on changing circumstances.
The mid-year review takes place by the end of October of every year and is formalized by way of the signature of the manager and staff on the appropriate G.O.A.L. form (if applicable). The staff member keeps the original, and provides a copy of the relevant summary to the manager.

Making time for regular reviews is a joint responsibility between staff and managers.

The Year-End Performance Review

Performance Reviews are regular reviews of an individual staff member’s performance in comparison to the expected skills, knowledge, and abilities required for their job. It is a two-way discussion which focuses on both areas of excellence as well as areas requiring improvement. The objective is to allow staff to realize their full potential within their job. Ideal performance reviews incorporate actionable feedback into the process to enhance strengths and develop weaknesses. With proper communication, performance reviews are an important part of continuous learning in the workplace, as well as a key factor in both performance management and performance development.

The year-end review is a formal event in the G.O.A.L. cycle. The manager and staff discuss the achievement of goals and demonstration of competencies.

The discussion should take place in a quiet, private place where other distractions are eliminated.

Also at this stage, advance preparation is important. At least one week prior to this meeting, the staff member should provide a draft self-appraisal using the G.O.A.L. form to the manager for consideration.

Following the review of the self-appraisal and the feedback received, the manager provides ratings of the staff member’s accomplishment of objectives and demonstration of competencies. Ratings related to the level of achievement of agreed objectives form the basis upon which decisions are established regarding various organizational policies such as promotion, learning and in some cases compensation.

Year-end reviews must be completed by April each year. Once again, the manager and staff sign the G.O.A.L. form.

The annual development plan for the staff member is also completed at this time to identify work goals for the year, and goals for learning and development based on needs for current and future responsibilities.

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