

# FOCUS Performance Management Process: Goal Setting

## Sample goal statements from the Medical School and Central Campus

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### Financial Analyst's Goals

#### Improvement Goal

Improve the flow of timely, accurate, clear and easy-to-use financial information to users. Consistently produce quarterly reports exclusively through FMT. Reports must be 100% accurate and available to users by the 15<sup>th</sup> of the month following the end of each quarter.

#### Improvement/Development Goal (Stretch)

Assist in building team's capacity by training new staff in reading and interpreting financial statements and managing closeout process. Formulate training plan and schedule, and design and document learning tips and tools to ensure current and future new staff efficiently learn and retain information. Staff to be fully trained and materials developed by year end.

### Research Administrator's Goals

#### Development Goal

Enhance ability to assist PI's doing clinical trial work by learning Medical School and Department terminology, e.g. medical terms, diagnosis, treatment, adverse outcomes, etc. Attend Grand Rounds, relevant lectures and online classes to increase knowledge base by November 2008.

#### Improvement/Development Goal

Master Yale's system for submitting grants to reduce backlogs and speed submission process, by becoming fully conversant with government grants and other sponsored applications. Specifically speed the process of the pre-award review and approval process by managing to turnaround proposals as close to 5 days as possible. Learn the processes utilized by GCFA and the Grants and Contracts office by February 1, '09.

### Administrative Assistant's Goals

#### Key Job Functions Goal

Contribute to efficient and high quality department function by providing timely, high quality secretarial assistance including email, correspondence, scheduling, papers, and presentations. Work should be consistently accurate and completed by deadlines.

#### Key Job Functions Goal

Consistently manage all special functions efficiently (e.g., Grand Rounds, special presentations) by planning and organizing to ensure all details are handled in advance, and orchestrating events so that functions run smoothly. Make travel arrangements as needed, arrange reimbursements within 7 days after travel. Communicate clearly the details of the travel plans, and follow-up to make sure reimbursements are accurate and timely.

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### Academic Department Goals

#### Project Goal

Develop a Mentoring Program with a cross functional team. Select team members; develop goals, budget, project plan and timeline by mid-December 2008. In January 2009, start the implementation phase to have the program up and running by end of first quarter 2009. Meet regular director review and sign-off milestones incorporated in the timeline.

#### Project Goal

Counsel incoming students on cultural norms and assist with integration into the Yale Community. Develop a guide for the new students that includes Yale specific information as well as information about New Haven. Guide needs to be completed by August 1, 2008 to allow for printing and distribution at orientation on September 2, 2008. Guide to receive a rating of 4 or 5 on a 5 point scale of usefulness via a survey to be completed by users in November '08.

### Finance Goals

#### Process Improvement Goal

Design and create and institute a month-end report that identifies financial allocations to improve tracking of spending patterns. Analyze data for trends and make recommendations on adjusted spending patterns by the 15<sup>th</sup> of the following month. Process to be operative by end of first quarter '09. User feedback to be gathered in 3<sup>rd</sup> quarter and usefulness of report to be rated as a 4 or 5 on a 5 point scale.

#### Key Job Functions Goal

Extract data from the financial ledger, review for accuracy, and compile data into a spreadsheet to be distributed at the weekly update meeting. After the meeting, make appropriate changes to the spreadsheet and redistribute to the team by the next day.

### Communications Specialist

#### Key Job Functions Goal

Edit department journal to ensure accuracy, improve flow and style, and correct grammar by the 20<sup>th</sup> of each month. Organize and plan content coordinating with web designer, consistently ensuring that the journal is available on the web by the first of each month.

### Development Department Staff

#### Key Job Functions/Improvement Goal

Establish realistic target participation levels for contribution to the annual campaign by developing relationships with assigned donors. Consistently review donor profiles and update when necessary. Contact donors by letter and follow-up by telephone call once per quarter. Achieve 10% increase in participation from assigned donor group for annual campaign.