



UNIVERSITY *of*
WEST FLORIDA

**Setting Objectives Using SMART Goals
For PageUp Performance Management**

Setting goals and objectives is the first step in the performance evaluation process.

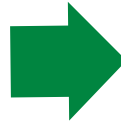
Goals are forward-facing and provide your department, college, or division with clear direction to move forward.

Objectives can be mile markers along the road indicating progress and maintaining motivation.

Position Orientation/Annual Non-Supervisors, Supervisors, and Coaches Evaluations

The first step in an evaluation cycle is for the supervisor to create objectives. Once created, the supervisor will meet with the employee to review the objectives. When reviewed and accepted, the employee will acknowledge the objectives. (Specific directions with photos are included at the end of this presentation.)

**Supervisor Creates
Objectives**



**Employee
Acknowledges
Objectives**

- Goals define what should be accomplished while objectives define the actions needed to achieve the goal.

Goals

- General
- Intangible
- Broad
- Abstract
- Strategic—aligned to the university's strategic plan

Objectives

- Specific
 - Measurable
 - Narrow
 - Tactical—short-range, set by supervisors to support the accomplishment of goals
-

When setting goals and objectives, use SMART criteria:

- **S**pecific
 - **M**easurable
 - **A**chievable
 - **R**elevant/Realistic
 - **T**ime-bound
-

Specific goals and objectives are:

- Detailed
- Focused
- Well-defined
- Straightforward
- Action-oriented

When setting objectives that are specific, ask the following questions:

- What do I want my employee to do? Use action verbs such as develop, execute, conduct, and build.
- Why is it important to do this task?
- Is working with others required? If so, who?
- When should this task be completed?
- How will they accomplish the tasks; are there any specific tools/systems/etc. they should use?

Measurements help you know you are making progress toward completing the objectives.

Progress measurements also allow for course corrections along the way for both direction and pace.

Objectives that are measurable provide tangible evidence of completion.

When setting objectives that are measurable, ask the following questions:

- How will my employee and I know when this objective has been achieved?
- What measurements can we use?
- What milestones can my employee and I use to track progress toward completion?

Achievable objectives are those that can actually be accomplished (something that can realistically be done within the time frame set) not an aspiration or vision.

Achievable objectives need to be challenging but not so much that they are unattainable or cause frustration meeting them.

Full commitment is necessary to achieve the objectives.

Note: Often the measurement is difficult and supervisors and employees will need to work together to identify the most relevant and feasible data sources and collection methods to measure success. At the very least, the supervisor needs to discuss what success might look like.

Measurement can be both quantitative and qualitative.

SMART Goals and Objectives – Relevant/Realistic

Realistic objectives are those that the employee has the resources to accomplish, including:

- Skills
- Tools
- Time

When setting objectives that are relevant and realistic, ask the following questions:

- How will pursuing this objective affect other performance objectives?
- Will this objective help meet/support department and university goals?
- Does the employee have the resources to accomplish this objective? If not, what additional resources are needed?
- Will the employee need to rearrange any priorities to accomplish this objective?

SMART Goals and Objectives – Time-Focused

Time-focused objectives are those that have realistic deadlines for completion. The time frames create a sense of urgency and lead to action.

Complex objectives can be broken into small parts with deadlines set for completion of each phase.

When setting objectives that are time-focused, ask the following questions:

- What are the earliest—yet achievable and realistic—dates for this objective to be started and to be completed?
- Have I included these dates in the statement of the objective?
- Are there other projects/objectives that must be completed first? Are other individuals or objectives reliant on the completion of this objective?

Aligning SMART Goals

Meet with your department, college, or division leader and understand your role and expectations (objectives) for meeting goals aligned to the UWF's strategic plan. Do not be afraid to ask.

Success requires clarity!

Once you understand your part, you may then provide your direct report(s) with specific, measurable, attainable, realistic/relevant, and time-focused action to assure both their and your success!

Weak/Immeasurable Objective: Improve computer skills.

- **Better Objective:** Improve advanced knowledge of MS Word, PowerPoint and Excel by completing courses offered via LinkedIn Learning by the end of fall semester, to improve efficiency in report writing and review, helping our administrative processes run more efficiently. (I recommend you research and assign specific professional development courses with expected completion dates and follow-up.)

Weak/Immeasurable Objective: Improve customer service skills.

- **Better Objective:** Improve customer service skills by completing customer service, communication and diversity training in LinkedIn Learning, by November 30, 2023. Improved CS skills will improve your student feedback scores and lead to higher student engagement and success. (I recommend you research and assign specific professional development courses with expected completion dates and follow-up.)

Weak/Immeasurable Objective: Improve supervisory skills.

- **Better Objective:** Improve your supervisory skills by attending the “Conflict in the Workplace” and “The Power of Positive Discipline” trainings included in the Leadership and Management Certificate program, by December 1, 2023. Improving these skills will help you better understand and resolve employee issues, leading to higher employee engagement and retention.

Supervisor Creates Objectives



As a supervisor, it is now time to create the **Objectives** for Lynne Randall. These **Objectives** allow you to set proper and clear expectations of how Lynne will be successful in their role. Once you have created the **Objectives**, Lynne will be given the **Objectives** to review and acknowledge.

Click **NEXT** to move to the next page to **Add Objectives**.

- **Open the PageUp App from MyUWF.**
- **Click on “My team” in the blue ribbon.**
- **Select “Performance reviews.”**

- **Make sure “Status” is set to “Current.”**
- **Select “Open Review” for the employee.**

Follow the instructions on each page.

Supervisor Creates Objectives

To add an objective, click “+ Add Objective (Supervisor ONLY).”
To delete an objective, click on the trash can icon that appears on the top right side of an added objective.

Current Year Objectives ✓ Saved Actions ▾

Setting objectives is the first step of the Performance Management process. The supervisor will meet with the employee to discuss and set **SMART Goals/Objectives** for the year. These objectives should align with your department's objectives and with **UWF's Strategic Plan**. The supervisor may also want to discuss and record any professional development goals or learning objectives with the employee at this time. Professional development goals should include how the skills/knowledge will be developed (on the job training, job-shadowing, professional development courses, conference attendance, etc.).

The supervisor will meet with the employee throughout the year to discuss progress. Both the supervisor and employee may use the **Journaling** or **1-on-1 features** in PageUp Performance, or their own progress tracking tool to capture and track progress. If a supervisor uses the PageUp features, they should be sure to include the employee name in the comments section to track and access the comments throughout the year.

Note: Comments may be private or shared within the review, either initially or later in the review process.

Employee: The employee has no action steps in PageUp Performance while the supervisor is setting objectives. The employee will acknowledge the objectives in the **Employee Acknowledges Objectives** step of the process. Please Note: The employee should not click on the +Add Objectives (Supervisor ONLY) box; adding objectives is reserved for supervisors.

Supervisor: The supervisor will Click + **Add Objectives** to add an objective to an employee's review. To delete an objective, the supervisor will click the trash can icon in the upper right corner of the objective. Once they have entered all objectives, they will click **Next** box(s) until they reach **Go to Next Step**. Clicking on **Go to Next Step** will advance the review to **Employee Acknowledges Objectives**.

+ Add Objective (Supervisor ONLY)

← Back Next →

Review the University Strategic Plan to align the employee's objectives with the University's mission/objectives.

Click “Next” to move to the next step in the process.

Supervisor Creates Objectives

There is no action for the Supervisor under this section of the chevron image at the top of the page.

Start > Current Year Objectives > **Employee Significant Accomplishments** > Attachments > Supervisor Evaluation of Employee >

Next steps

Employee Significant Accomplishments ✓ Saved Last saved: 11 Jul 2022, 12:10pm Actions ▾


The **Significant Accomplishments** section of the review is reserved for accomplishments that were not specifically assigned as part of the employee's current year objectives. Significant accomplishments should be entered in the **Significant Accomplishments** section of the review.

Employee:	Enter an Accomplishment by clicking on +Add Accomplishments .
Supervisor:	There is no action for a supervisor in this step. The supervisor will review the accomplishment(s) and add a Comment (if desired) during the Supervisor Evaluation of Employee step. The supervisor should NOT add any additional accomplishments.

[+ Add Accomplishments \(Employee ONLY\)](#)

[← Back](#) [Next →](#)

Please click “Next” to continue to the next step in the process.



Supervisor Creates Objectives

Click “+Add Attachments” to upload documents.

Start > Current Year Objectives > Employee Significant Accomplishments > **Attachments** > Supervisor Evaluation of Employee >

Next steps

Attachments ✓ Saved Last saved: 11 Jul 2022, 12:11pm Actions ▾

An employee or supervisor may add an **Attachment(s)** that supports reaching an **Objective**, a **Competency**, or a **Significant Accomplishment**.

Employee:	Click on +Add Attachments if you would like to add an attachment. Attachments are not mandatory. Attachments may be added until the review is submitted to the supervisor for Supervisor Evaluation of Employee .
Supervisor:	Click on +Add Attachments if you would like to add an attachment. Attachments are not mandatory. The supervisor should review all attachments during the Supervisor Evaluation of Employee step.

+ Add Attachments ← Back Next →

Attachments should not be more than 10 pages. Examples of supervisor attachments include recognition emails sent about the employee, improvement plans, etc.

Supervisor Creates Objectives

There is no action for the Supervisor to complete under this section of the chevron image at this time. You will complete the Supervisor Evaluation of Employee step after the employee has completed their self-evaluation at the end of the review process. Please click “Next” at the bottom of the page to continue to the next step in the review process.

Start > Current Year Objectives > Employee Significant Accomplishments > Attachments > Supervisor Evaluation of Employee >

Next steps

Supervisor Evaluation of Employee ✓ Saved Last saved: 11 Jul 2022, 12:11pm Actions ▾

🔒 Knowledge, Skills, and Abilities
Employee has the knowledge, skills, and abilities needed in the present position.

🔒 Quality/Quantity of Work
Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness, and at a satisfactory rate.

Supervisor Creates Objectives

You will see an acknowledgement thanking you for entering the employee's objectives. You will see the objectives listed in the Summary section of the page.

Click "Go To Next Step" to complete this part of the review process.
Your employee will receive an email directing them to log into the review and acknowledge their Objectives.

Summary ⋮

Summary

▼ Current Year Objectives

▶ Employee Significant Accomplishments

▶ Attachments

▶ Supervisor Evaluation of Employee

Your next step: Employee Acknowledges Objectives

Clicking "Go to next step" will move this review to the next step and you will be unable to return to this step

Go to next step

Click "Go to next step" to complete this part of the review process. The employee will receive an email directing them to log into the review and acknowledge their objectives.

After the supervisor sets objectives for the employee, the supervisor should meet with the employee to discuss the objectives and address any questions or concerns.

This step is not completed in the PageUp Performance system. Documentation of the meeting is recommended.

Employee Acknowledges Objectives

- The Employee will log into PageUp to acknowledge the objectives discussed during the objectives review meeting.
 - The PageUp system will automatically save any changes or updates, so the Employee may close the program and come back to it at a later date.
 - The Employee may request a meeting with the Supervisor to discuss any questions or concerns about the objectives.
-

Employee Acknowledges Objectives



ACKNOWLEDGING OBJECTIVES:

1. Click **Next** to review and acknowledge objectives.
2. Continue clicking **Next** on the bottom right side of the page (advancing through all the sections in the chevron image at the top of the page), until you reach the page which displays the **Acknowledge now** bolded text in the pink box.
3. Once you click the **Acknowledge now** text, you will be redirected to the start page where you will click the **Confirm** button in the lower left portion of the page. You will then select the **Next steps** section in the chevron image at the top of the page. Once you have clicked **Next steps**, you will be directed to the final page where you will select **Go to next steps** on the bottom of the page. Clicking **Go to next steps** will send a notice to your supervisor that you have acknowledged your objectives and move the review to **Evaluating Period**.

(You may want to copy and paste these directions into a Word document or notes page for reference.)

First, the Employee will log in to PageUp from MyUWF, follow the instructions below to access the review, then follow the instructions on each page of the review.

In PageUp:

- Select “About me” in the blue ribbon.
- Select “Performance reviews”
- Make sure “Status” is set to “Current.”
- Select “Open review.”

Once the review is open, read the instructions carefully. I recommend you copy and paste the directions into a Word doc. for easy reference.

The “Current Year Objectives” page provides an overview and lists objectives. It also provides a brief description of the Journal and 1-on-1 features in PageUp Performance.

Start > **Current Year Objectives** > Employee Significant Accomplishments > Attachments > Supervisor Evaluation of Employee >

Next steps

Current Year Objectives ✓ Saved Last saved: 11 Jul 2022, 12:35pm Actions ▾

Setting objectives is the first step of the Performance Management process. The supervisor will meet with the employee to discuss and set **SMART Goals/Objectives** for the year. These objectives should align with your department's objectives and with **UWF's Strategic Plan**. The supervisor may also want to discuss and record any professional development goals or learning objectives with the employee at this time. Professional development goals should include how the skills/knowledge will be developed (on the job training, job-shadowing, professional development courses, conference attendance, etc.).

The supervisor will meet with the employee throughout the year to discuss progress. Both the supervisor and employee may use the **Journaling** or **1-on-1 features** in PageUp Performance, or their own progress tracking tool to capture and track progress. If a supervisor uses the PageUp features, they should be sure to include the employee name in the comments section to track and access the comments throughout the year.

Note: Comments may be private or shared within the review, either initially or later in the review process.


Employee: The employee has no action steps in PageUp Performance while the supervisor is setting objectives. The employee will acknowledge the objectives in the **Employee Acknowledges Objectives** step of the process. Please Note: The employee should not click on the +Add Objectives (Supervisor ONLY) box; adding objectives is reserved for supervisors.

Supervisor: The supervisor will click **+ Add Objectives** to add an objective to an employee's review. To delete an objective, the supervisor will click the trash can icon in the upper right corner of the objective. Once they have entered all objectives, they will click **Next** box(s) until they reach **Go to Next Step**. Clicking on **Go to Next Step** will advance the review to **Employee Acknowledges Objectives**.

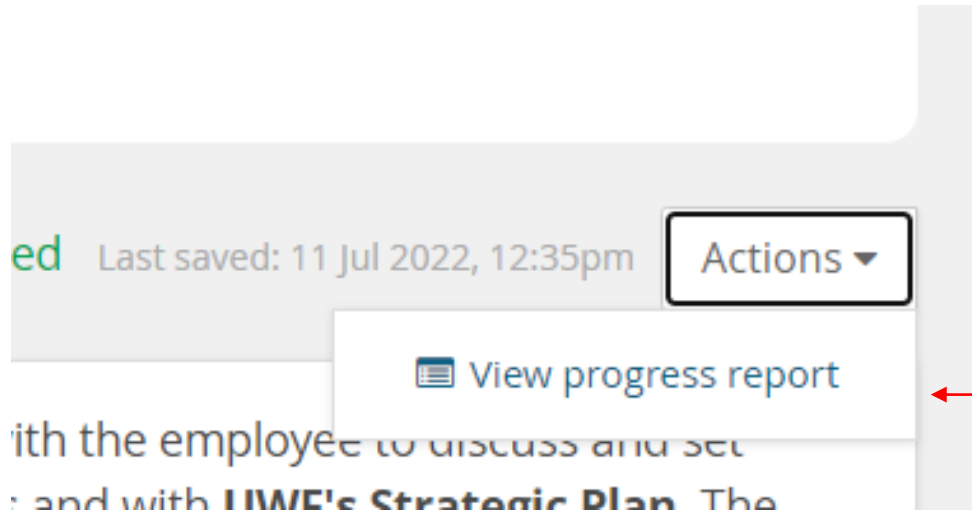
+ Add Objective (Supervisor ONLY)

← Back Next →

This page will also display objectives entered by the Supervisor. The Employee should review the objectives then click on “Next” to start the acknowledgement process.



Employee Acknowledges Objectives



The Employee may view a copy of the review at this stage by selecting the “Actions” dropdown menu and selecting “View progress report.” Once finished viewing the report, click “Next” at the bottom of the page.

There is no action for the Employee to take under this section at this time. The Employee may add Significant Accomplishments during the Employee Self-Evaluation step in the review process.

Start > Current Year Objectives > **Employee Significant Accomplishments** > Attachments > Supervisor Evaluation of Employee >

Next steps

Employee Significant Accomplishments ✓ Saved Last saved: 11 Jul 2022, 12:35pm Actions ▾

The **Significant Accomplishments** section of the review is reserved for accomplishments that were not specifically assigned as part of the employee's current year objectives. Significant accomplishments should be entered in the **Significant Accomplishments** section of the review.

Employee:	Enter an Accomplishment by clicking on +Add Accomplishments .
Supervisor:	There is no action for a supervisor in this step. The supervisor will review the accomplishment(s) and add a Comment (if desired) during the Supervisor Evaluation of Employee step. The supervisor should NOT add any additional accomplishments.

[+ Add Accomplishments \(Employee ONLY\)](#)

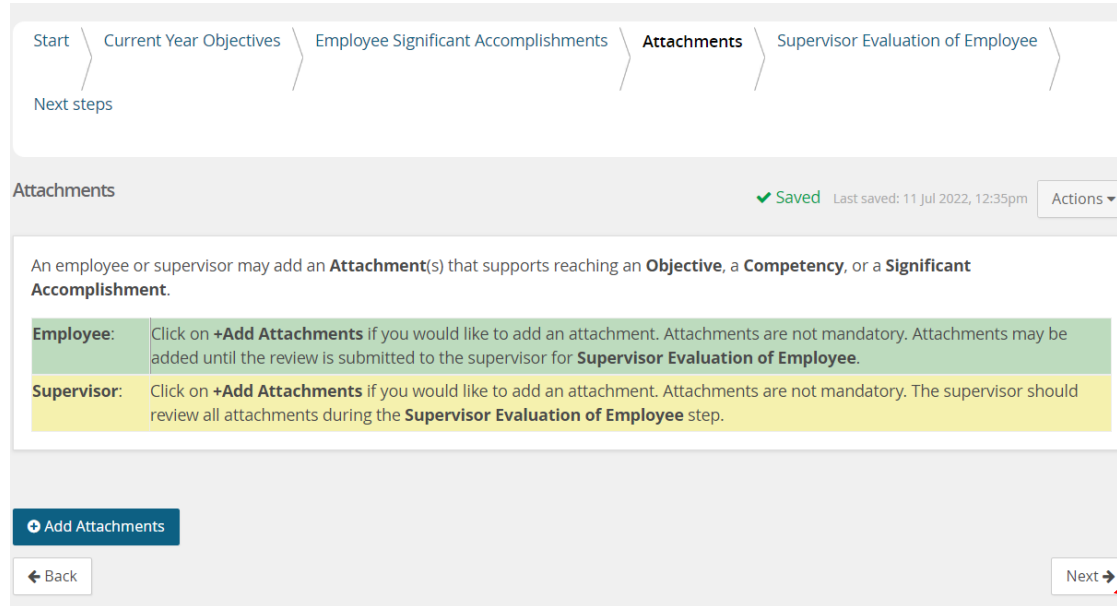
[← Back](#) [Next →](#)

Please click on "Next" to advance the process.



Employee Acknowledges Objectives

There is no action for the Employee to take under this section at this time.



Start > Current Year Objectives > Employee Significant Accomplishments > **Attachments** > Supervisor Evaluation of Employee >

Next steps

Attachments ✓ Saved Last saved: 11 Jul 2022, 12:35pm Actions ▾

An employee or supervisor may add an **Attachment(s)** that supports reaching an **Objective**, a **Competency**, or a **Significant Accomplishment**.

Employee: Click on **+Add Attachments** if you would like to add an attachment. Attachments are not mandatory. Attachments may be added until the review is submitted to the supervisor for **Supervisor Evaluation of Employee**.

Supervisor: Click on **+Add Attachments** if you would like to add an attachment. Attachments are not mandatory. The supervisor should review all attachments during the **Supervisor Evaluation of Employee** steps.

+ Add Attachments

< Back **Next >**

The Employee has the opportunity to add Attachments before the objectives are acknowledged and when the review is in the Employee Self-Evaluation step. Click "Next" to advance the process.

Employee Acknowledges Objectives

There is no action for the Employee to take under this section at this time.

Start > Current Year Objectives > Employee Significant Accomplishments > Attachments > Supervisor Evaluation of Employee >

Next steps

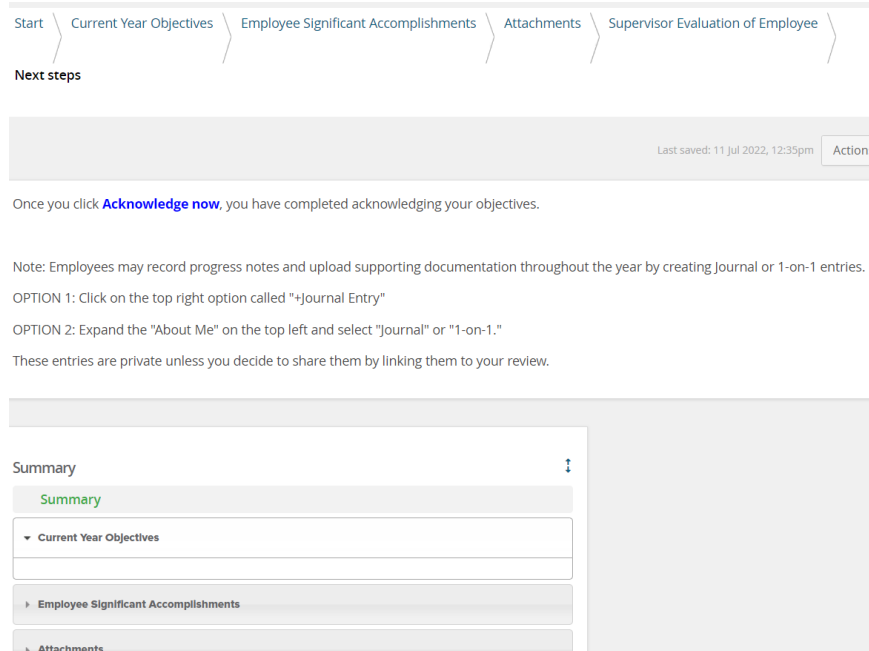
Supervisor Evaluation of Employee ✓ Saved Last saved: 11 Jul 2022, 12:35pm Actions ▾

🔒 Knowledge, Skills, and Abilities
Employee has the knowledge, skills, and abilities needed in the present position.

🔒 Quality/Quantity of Work
Employee has the ability to independently plan, prioritize, and complete work with accuracy, neatness, and at a satisfactory rate.

Click “Next” at the bottom of the page to advance the process.

The Employee may review a summary of the review at this point. Please read the entire page then follow the instructions on the following page to acknowledge your objectives.



Start > Current Year Objectives > Employee Significant Accomplishments > Attachments > Supervisor Evaluation of Employee >

Next steps

Last saved: 11 Jul 2022, 12:35pm Actions ▾

Once you click [Acknowledge now](#), you have completed acknowledging your objectives.

Note: Employees may record progress notes and upload supporting documentation throughout the year by creating Journal or 1-on-1 entries.

OPTION 1: Click on the top right option called "+Journal Entry"

OPTION 2: Expand the "About Me" on the top left and select "Journal" or "1-on-1."

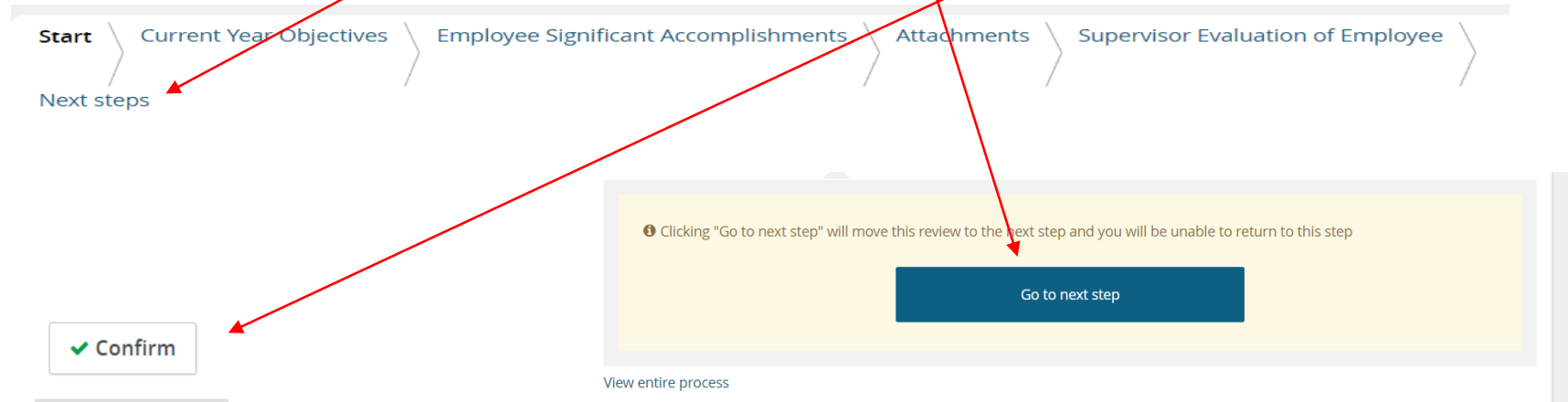
These entries are private unless you decide to share them by linking them to your review.

Summary ⓘ

- Summary
- ▼ Current Year Objectives
- ▶ Employee Significant Accomplishments
- ▶ Attachments

Employee Acknowledges Objectives

Once you click the **Acknowledge now** text, you will be redirected to the start page where you will click the **Confirm** button in the lower left portion of the page. You will then select the **Next steps** section in the chevron image at the top of the page. Once you have clicked **Next steps**, you will be directed to the final page where you will select **Go to next steps** on the bottom of the page. Clicking **Go to next steps** will send a notice to your supervisor that you have acknowledged your objectives and move the review to **Evaluating Period**.



The screenshot displays a navigation bar with the following steps: **Start**, **Current Year Objectives**, **Employee Significant Accomplishments**, **Attachments**, and **Supervisor Evaluation of Employee**. Below the navigation bar, there is a **Next steps** section. A red arrow points from the **Next steps** text in the navigation bar to the **Next steps** text in the main content area. Another red arrow points from the **Next steps** text in the main content area to the **Go to next step** button in a yellow callout box. A third red arrow points from the **Go to next step** button in the callout box to the **Confirm** button in the lower left corner of the page. The callout box contains the text: "Clicking 'Go to next step' will move this review to the next step and you will be unable to return to this step". Below the callout box is a **View entire process** link.

I hope this information has helped. If you need additional assistance, please call.



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or Jamie Sprague at 850-474-2156 or jsprague@uwf.edu