

## Purpose and Goal Setting Essentials

### Performance Excellence Annual Plan

#### Your Purpose

The most powerful planning starts with a question:

**“What value am I creating in my role, and for whom?”**

You can think of purpose as your own personal mission statement, providing clarity and inspiration as you set goals. Purpose does not typically change dramatically from year-to-year unless your role or the work of your unit changes. Avoid the temptation to think of purpose in terms of what you do. Purpose is about impact on others. Here are a few examples of purpose statements:

Ready to login?

[learn.northwestern.edu](http://learn.northwestern.edu)

Access additional tools and

resources: [perform.northwestern.edu](http://perform.northwestern.edu)

**Help:** For policy and process questions, contact your unit's HR Administrator.

For technical support: 847-491-4357 (1-HELP) or [consultant@northwestern.edu](mailto:consultant@northwestern.edu)

Role	Purpose
Department Program Assistant	To help students, faculty, and staff colleagues maximize the time they spend on what is most important to them.
Facilities Management Groundskeeper	To create a safe and beautiful environment that reflects the excellence of the University.
Financial Coordinator	To enable faculty to maximize the resources available for research while safeguarding the University and public against the misuse of assets.
Development Director	To enhance the ongoing connection of Alumni to Northwestern, making both alumni and the University ever stronger in the process.
Research Project Coordinator	To enable the research team with the subjects, information, and process to create new knowledge and discoveries.
Research Technician	To contribute to high-quality research outcomes by providing researchers with reliable data.
Associate Dean of Administration	To lead the school's advancement by aligning the school's finite resources (e.g., finances, talent, and space) to its priorities.

#### Your Goals

We set goals for a few important reasons:

1. To align our efforts with our school or unit's goals.
2. To create a shared understanding of priorities with our supervisor.

3. To challenge ourselves to grow and accomplish important things.

Once you have your purpose in mind, you can develop a set of goals that highlight your most important planned contributions for the year. Like with purpose, focus on what, not how. What outcomes you will achieve and what positive impact you will create. Information on how you will create these outcomes can be addressed elsewhere, such as job descriptions, task lists, and project plans.

Some supervisors will ask you to create your own goals. Others will suggest goals to you. What's most important is that you and your supervisor discuss the goals and become jointly responsible for achieving them.

You may have goals that highlight the most essential aspects of your ongoing core responsibilities for the year. You may also have goals that highlight a project or initiative that is not part of your ongoing responsibilities.

You should also set development goals (see *Creating Your Development Plan* job aid). These goals are your opportunity to explore your longer-term career interests while contributing in your current role. Both performance and development goals should be stated using the principles described here. However, your achievement of performance goals is part of your year-end rating, whereas development goals are not considered in the rating.

Most of us should aim for **two to four** performance goals.

If you have trouble limiting yourself to four or fewer performance goals, look for a common purpose among some of the goals and try to consolidate them. Look for goals that may not have the same high level of impact as the others and eliminate them.

Northwestern uses the SIMple framework as a guide to setting goals.

**S = Specific** or objectively measurable. The measures should be stated in terms of outcomes and impact, and may be quantitative or qualitative.

**I = Important** or aligned with your unit's goals. When accomplished, your goals should have a positive impact on your stakeholders, team, and unit.

**M = Meaningful** or important to you. Your goals should be motivating to you. When accomplished, your goals should be a source of pride and fulfillment.

If you have questions about stating your purpose or setting goals, please contact your Human Resources Administrator.

**Examples**

Role	SIMple Goals
<b>Department Program Assistant</b>	<p>(Core Responsibility) Provide students who visit the Department office an exceptional experience, by giving them information and guidance that allows them to accomplish their goal, while making them feel valued and respected by the Department. Resolve student's need during their initial visit 80% of the time.</p> <p>(Project or Initiative) Improve the faculty expense reimbursement process, allowing faculty to spend less time and have a better overall experience. Assess results by faculty feedback and reduction in average time from incur to reimburse cycle.</p>
<b>Facilities Management Groundskeeper</b>	<p>(Core Responsibility) Interact with community members as an ambassador of the University. Answer questions and provide directions in a way that conveys caring and professionalism.</p>

	(Project or Initiative) Identify and take the lead in implementing at least one improvement in the way you or your team does its work.
<b>Financial Coordinator</b>	<p>(Core Responsibility) Track and communicate faculty research accounts such that faculty can maximize their resources with a minimum of effort. Results will be measured by faculty feedback and reduction of accounting rework.</p> <p>(Project or Initiative) Design and implement a new report that solves a currently unmet Department need. This report will provide insight to support better decisions or a better ability to manage.</p>
<b>Development Director</b>	<p>(Core Responsibility). Support the strategic objectives of the University by raising major and principal gifts, attaining a high score on fundraising accountability metrics by exceeding stated goals for commitments, solicitations, dollars raised, visits, and proposal assists.</p> <p>(Project or Initiative). Design and execute strategy to raise funds for Unit priorities through increased collaboration with Gift Planning and Regional Major Gift teams, leveraging volunteers and strategically deploying University leaders to enhance fundraising productivity. Gain insight into Unit fundraising dollars, proposal progress and prospect management by leading enhancements to the data development process.</p>
<b>Research Project Coordinator</b>	<p>(Core Responsibility) Achieve or exceed subject recruiting targets. Manage subject expectations such that an increasing percentage of subjects participate in all aspects of the study.</p> <p>(Project or Initiative) Create an interest group of research coordinators from other studies. Identify best practice from another study that could be implemented and result in an improvement in your study.</p>
<b>Research Technician</b>	<p>(Core Responsibility) Maximize research output by maintaining uptime and accuracy of the lab's instruments. Instruments will be available to researchers 95% or more of the time when requested.</p> <p>(Project or Initiative) - Enhance the impact of lab's research by introducing and operationalizing two new research techniques. Techniques will be reflected in analysis supporting published research.</p>
<b>Associate Dean of Administration</b>	<p>(Core Responsibility) Enable the Dean, faculty, staff, and students to achieve their objectives by leading the provision of services that anticipate and fulfill these stakeholders' needs.</p> <p>(Project or Initiative) Improve the alignment of School resources to goals by redesigning the intra-unit budgeting process.</p>