



ENGAGE & INVEST IN PEOPLE - by setting expectations and providing role clarity, and by receiving the right feedback from the right people at the right time

Reference Guide: Goal-setting and Learning Plans

In creating your goals please use your programmatic, departmental, or portfolio plans to inform your objectives as well as the 2018/19 Operating Plan as it aligns to your key deliverables.

Use the “SMART” method as your guide for setting performance goals and learning plans

Specific: the objective should be focused and concrete, with a tangible, observable outcome

Measurable: it should be easy to determine the achievement of the objective in qualitative or quantitative terms

Attainable: the objective should be manageable and possible to achieve considering available resources and expected timelines

Relevant: the objective should contribute to the employee’s role and organizational / unit goals and objectives,

Timely: the objective should identify deadlines and milestones for tracking

Goals/Objectives

The following is an example of a **SMART** goal when applied to Goal Setting:

GOAL SETTING	
OBJECTIVE: Improve 8 South Patient Survey Collection and Completion 30% by 2019 Q1	
ACTION PLAN:	
Review and benchmark existing survey completion and collection rates (Q1 2018)	Specific, Attainable
Create an accessible online survey (Q2 2018)	Relevant
Purchase/Acquire IT-approved tablet for use in 8 South (Q1 2018),	Timeline
Train 8 South staff on the new survey process, (Q3 2018)	
Conduct surveys and Assess Results (Q3-Q4 2018)	Measurable

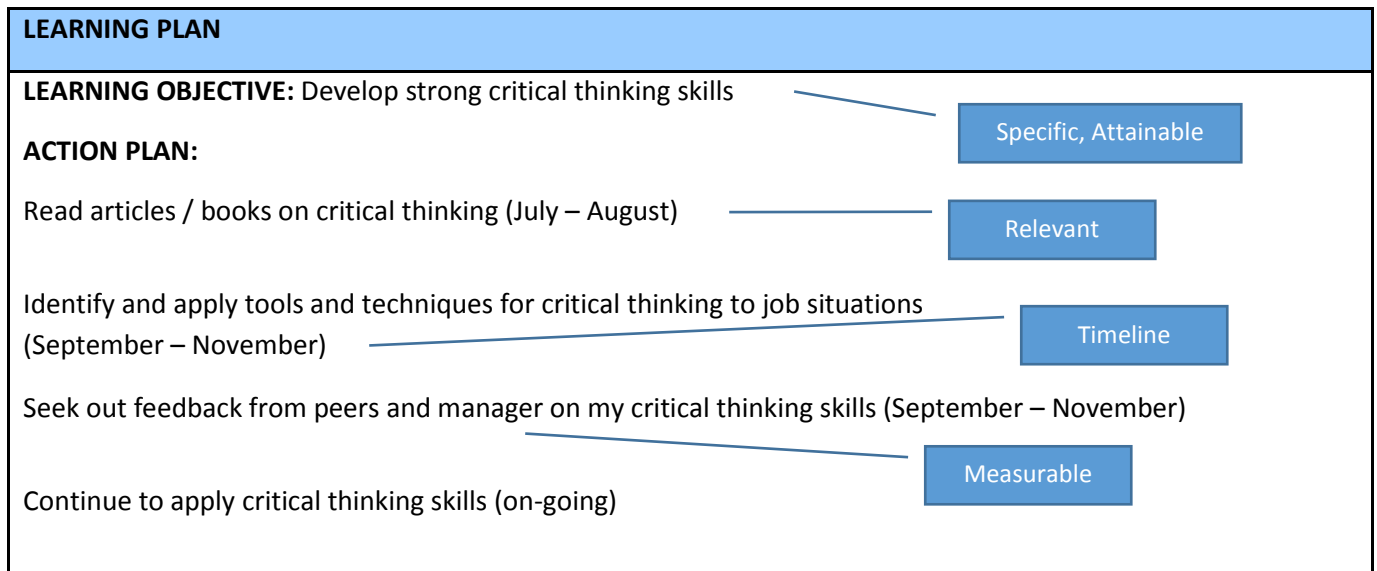


ENGAGE & INVEST IN PEOPLE - by setting expectations and providing role clarity, and by receiving the right feedback from the right people at the right time

Learning Plan

When planning learning goals, use the SMART approach as a template, but they should also follow a ratio of **70:20:10** for achievement (e.g. 10% formal or self-directed learning, 20% guided or directed practice, and 70% on-the-job learning). These ratios are not absolute, but the on-the-job learning should have a greater proportion of effort when compared to the formal learning, which may take place in a classroom, workshop (face-to-face or online), or self-directed readings and explorations.

The following is an example of a **SMART** goal when applied to part of a Learning Plan:



For the learning plan, we recommend being “SMART-ER”, where all goals are SMART, but they include a discussion on the Emotional Connection to the goal, as well as being Replicable; either for the individual, or for others in the team.