Setting SMART Objectives in the PDR

Information for Reviewees and Reviewers

September 2012

www.mclarensolutions.com
Writing Objectives - Introduction

There are a number of things that can assist you in writing objectives:

• After thinking about job responsibilities, **Reviewees should suggest/propose their own**. Reviewing objectives written by others helps make them smarter.

• After Reviewers have agreed them, **review them together a few days later**. It’s easier to see how you might improve them once time has lapsed.

• When discussing Objectives, evaluate and discuss whether:
  – They are demanding enough
  – They relate to the individual’s personal development and are relevant to wider service objectives / targets in the future
  – How measurable they are (using the **SMART** methodology)

  **Specific**: Ensure the objective statement is clear, unambiguous, straightforward and understandable

  **Measurable**: Ensure the objective is capable of being measured. This can be quantitative e.g. quantity, quality, time, money or qualitative e.g. client feedback.

  **Agreed**: Ensure the reviewee agrees to the objective. Objectives should never be imposed unless there is no alternative.

  **Realistic**: Ensure the objective is challenging but realistic and achievable.

  **Time-bound**: Ensure you have agreed on a date for completion taking into account the objective's priority and degree of difficulty.
There are five key stages to writing SMART objectives:

1. Identify the main responsibilities / areas of work;
2. Agree what high-level things need to be achieved;
3. Challenge yourself to be as specific as you can;
4. Consider how success will be measured/discussed;
5. Agree a deadline and frequency of review if appropriate;

Also Advisable: Discuss and record (where appropriate) key targets and milestones. *(Note: the details agreed here should not necessarily be inputted into the PDR system, they can be used by Reviewee/Reviewer to discuss progress updates more regularly than the formal PDR)*
1. Identify the main responsibilities / areas of work

- Agree the **4-6 most important areas of work** for the Reviewee. These could be job, role or project specific and will help ensure the team delivers the agreed plan of work.

  e.g.:

  - handling customer complaints;
  - accessing grants for clubs/societies;
  - contract health and safety training;
  - environmental / energy efficiency checks;
  - supplier management / logistics

**Words/phrases to avoid when thinking about this as they are less helpful:**

- Develop a relationship with...
- Liaise with...
- Contribute to...
- Represent....
- Manage my team effectively

**The following do not help focus on work performance:**

- Update knowledge...
- Attend monthly meetings..
- Think about
2. Agree what high-level things need to be achieved

Example:

1. Reduce response times for customer complaints
2. Increase the number of societies accessing union/university grants
3. Contract new providers for health and safety training
4. Survey existing sites for energy efficiency

Note:

- use ‘action words’ to emphasise performance.
- focus on positive wording e.g. ‘reducing’, not ‘sorting out’; ‘increasing’ not ‘getting more’; ‘contract’ not ‘find’.
- the focus should be on what to achieve and should not be an action plan. Action plans should be managed outside of the PDR process in regular 1-to-1s
3. Challenge yourself to be as specific as you can

Example:

1. Reduce the time taken to resolve complaints from users of all the campus retail outlets (including shops and cafes)

2. Increase the number of non-sport based societies accessing university ‘widening participation’ grants

3. Contract a new provider for health and safety induction/ongoing training services with experience in Unions/Universities

4. Undertake a survey of all Union sites across the campus in order to establish the level of energy efficiency being achieved for our operations
4. Consider how success will be measured/discussed

Example:

1. Reduce the time taken to resolve complaints from 90% of users of all the campus retail outlets (including shops and cafes) to 15 days

2. Increase the number of non-sport based societies accessing university ‘widening participation’ grants by 25%

3. Contract a new provider for health and safety induction/ongoing training services with experience in Unions/Universities and conforming to with national H&D guidelines

4. Undertake a survey of all Union sites across the campus in order to establish the level of energy efficiency being achieved for our operations and what further action is needed to improve it

Note

• How will this change or improve what there is now?

• How will others (especially those who will benefit most) be able to tell what’s different?
Writing Objectives Step 5

5. Agree a deadline and frequency of review if appropriate

Example:

1. Reduce the time taken to resolve complaints from 90% of users of all the campus retail outlets (including shops and cafes) to 15 days by 31st May this year

2. Increase the number of non-sport based societies accessing university ‘widening participation’ grants by 25% over the next two rounds of bids for this academic year

3. Contract a new provider for health and safety induction/ongoing training services with experience in Unions/Universities and conforming to national H&D guidelines before the start of the next academic year

4. Undertake a survey of all Union sites across the campus in order to establish the level of energy efficiency being achieved for our operations and what further action is needed to improve it by 31st December this year
Also advisable: Discuss and record (if appropriate) key targets and milestones that can be discussed during regular 1-to-1s

Objective for a new environmental officer

Undertake a survey of all Union sites across the campus in order to establish the level of energy efficiency being achieved for our operations and what further action is needed to improve it by 31st December this year

Key targets/milestones

- Update Excel spreadsheets of sites, capacity and licence information from the Environment Agency by April 30th;
- Revise the existing survey forms by 15th May;
- Collect and collate results from survey returns between May to end of August
- Analyse findings and produce a report for the Environmental and Estates Committee Meeting in October
Have any questions? – please contact us …

Questions are guaranteed in life; Answers aren't.

Direct: +44 (0) 20 7410 7424
Free (UK): 0800 018 9720
Fax: +44 (0) 20 7410 7425
Email: support@mclarensolutions.com
Website: www.mclarensolutions.com

Lloyd's Avenue House
6 Lloyd's Avenue
London
EC3N 3AX
United Kingdom