Tips for Goal Setting during the Pandemic

This tip sheet will help managers and HR professionals at Harvard adapt FY21 goal setting. Whether employees are working 100% remotely, on campus, or a combination, the pandemic and resulting working conditions are lasting longer than anticipated. In this unique year, it is important to adapt goal setting and performance expectations.

What is different this year?

- Harvard has continued to adapt workplace policies, requiring our frequent attention.
- Many employees are managing with children learning remotely at home, or caring for elders, with compromised services and supports.
- Many families are impacted by ongoing consequences from COVID-19 illness or loss.

What hasn’t changed?

- The need for manager-employee discussion regarding performance goals.
- The need to achieve forward progress in support of organizational and team productivity.
- Long-term vision is very important. And a long-term perspective can boost resilience.

Tips to support managers in goal setting:

- Frame the planning as intention setting goals. Return to forward-looking intentions verbalized at the end of FY20. Review your department and team priorities as context for goal setting. To the extent possible, offer your own perspective on the work ahead.

- Keep it simple, and relevant. Concentrate on employee commitment to no more than 3-5 goals. Consider a goal around self-care and encourage taking advantage of the myriad of resources Harvard offers including EAP, Dependent Well Care, and Care.com. Consider a people-related goal to advance Team Engagement and/or Collaboration.

- Remember the overarching importance of DIB. Be aware. Familiarize yourself with Diversity, Inclusion and Belonging (DIB) plans and create your own DIB goal. How might you foster connection, and the building of deeper relationships? Encourage virtual “water cooler” conversations for sharing of information.

- Follow up to ensure documentation of intended goals. Keep focused on shorter term goals, in the 3-6 month timeframe. Create a brief agenda to discuss goal setting (sample on page 2), and send it in advance along with the questions you’ll use to guide the conversation.

Other ideas to keep in mind:

- In terms of “SMART” Performance Goals, focus especially on Achievable and Realistic.
- Some employees may find this a good time to pursue professional development goals. Explore both cost-free options as well as other opportunities to determine the best way to identify and support professional development goals (DIB, Harvard Training Portal, LinkedIn Learning).
- How has your organization adapted its values or desired behaviors? If these behaviors were specifically geared towards in-person work, how can desired behaviors for remote work be made transparent?
Forward looking questions (may be a follow up from discussion at outset of FY21)

- What goals and priorities do you expect to keep working on in the coming months?
- How may your goals and priorities shift?
- What new opportunities or new approaches are you excited about pursuing?
- What new skills might you use to pursue them?
- What do you anticipate as your greatest challenges?

Questions for setting goals Q2 and Q3

- What goals are you currently focused on?
- What has shifted since we last discussed goals for FY21?
- What do you anticipate being able to achieve in the next 3 months? 6 months?
- What have you contributed that was beyond or outside your usual responsibilities?
- How can I best support you?

SAMPLE Goal Reflection Conversation

Objectives:

1) Establish a routine for checking in on goals, even while many other routines are disrupted.
2) Recognize accomplishments to date in FY21, and check in on goals for next quarter, 6 months, or the remainder of fiscal year, acknowledging uncertainties.

Agenda:

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>5 Min</td>
<td>Quick check-in regarding where you are today</td>
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| 10 Min| Looking back: [Manager chooses questions most appropriate to this employee]  
What goals and priorities did you make the most progress on in x time frame?  
What are you most proud of?  
What are you most frustrated about?  
What have you learned about your work and the work of our team? |
| 10 Min| Looking Forward: [Manager chooses questions most appropriate to this employee]  
What goals and priorities do you expect to keep working on in the coming x months?  
How do you think your goals and priorities may shift?  
What new opportunities or new approaches are you excited about pursuing?  
What do you see as the greatest challenges at this point in time?  
How can I be of most help to you? |
| 15 Min| Questions and discussion  
Include agreement on how best to document this conversation in Peoplesoft. |

Gartner HR, Adjusting Midyear Reviews Amidst Disruption (NOTE: use Harvard Key for Gartner access)

Additional Resources:

- The NeuroLeadership Institute, Improve Performance Management in Times of Crisis
- Gartner HR, Recognition During COVID-19: An Essential Tool