What’s in this Guide

1. Why / Context and Rationale for Setting Expectations – Page 3

2. What / Establishing the Dialogue – Page 4


4. Again / Continuous Learning – Page 6

additional resources available at: http://greatmanager.ucsf.edu/
THE FOUNDATION – SETTING EXPECTATIONS
The foundation of effective people management is setting expectations. This practice begins at the time of hiring and is a dynamic and continuous process.

CONNECTING BROADER GOALS TO INDIVIDUAL PERFORMANCE
Ensuring staff ‘know what’s expected of them’ is more than defining performance expectations through a job description—although this is the baseline. It is connecting staff’s efforts to the goals of the department and UCSF’s larger goals and strategies.

ESTABLISH REGULAR DISCUSSIONS
In order to ensure expectations are clear and connected to the overall goals of the organization, managers need to set the stage for dialogue and establish a consistent and iterative process through which both employees and managers can improve outcomes.
### The Dialogue

Communication is a critical skill in setting expectations.

- Communication takes time and commitment and serves as the basis of any effective supervisory relationship.

Effective communication requires clarity, openness to two-way feedback, and authentic interest.

- Conversations should be built around inquiry and curiosity. Ask your employees open-ended questions (what and how) to better understand their perspective.

Expectations are set and reset through regular conversations.

- Conversations about expectations should happen every time performance, priorities, workflow and resource needs are discussed – which is to say most time employees and their manager interact.
Setting Expectations

**Background Materials**

Be sure to review UCSF's goals and strategies, business unit goals and priorities, and employees' job description and performance goals (be able to connect all three).

Reread employee's previous performance evaluations as well as feedback from others regarding employee's performance and any notes from previous dialogues with employee regarding his/her performance.

Evaluate employee's workload and current results in relationship to team's workload and results.

**Discussion Items**

Identify goals/success criteria for the project or position (connect both individual, departmental, and organizations goals).

Find out if staff member have everything necessary they need to ensure they are successful.

Determine what kind of feedback is the most effective for staff (everyone is different) and how each member want to be acknowledged for effective contributions.

**Check In’s**

Ask yourself whether or not expectations are clear and actionable.

Be sure to define expectations in terms of specific goals that are SMART (specific, measurable, achievable, realistic and timely).

Schedule and conduct regular check-in's so that targets are clear, feedback is timely, and acknowledgement of successful efforts is frequent.
Continuous Improvement

Manager
Ask yourself: “what has been the impact of holding regular expectation discussions both individually and as a group?”

Team
Ask your team: “What worked about the process? What could be done more often, better or differently to improve setting expectations and ensuring team success?

Improved Outcomes
Continue the process, modifying to achieve the best results. Be sure to celebrate successes large and small.