Goal Setting Process – 2023-2024

General process summary:

Faculty submit goals no later than October 18, 2023 for the 2023-2024 academic year. Any revisions to goals require department chair approval and all changes must be finalized by January 12, 2024.

Goals are grouped by area of responsibility, as applicable: research, teaching, service, administrative duties, extension, and librarianship.

Entering goals is a three-step process:

1) **Enter new goals** in Faculty Success/Activities, either through revising last year's or starting fresh.
2) **Submit the goals** through Faculty Success Workflow Process labeled 2023-24 Goal Approval. (Due 10/18)
3) **Revise goals in December** (if applicable – needs approval, and due January 11)

Workflow steps are presented in the picture below:
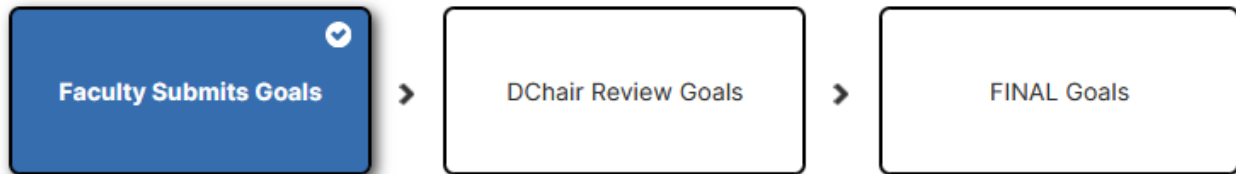
The following section of this handout explains detailed instructions to faculty for entering goals and anticipated workloads into FacultySuccess. Faculty should consult with their department chairs to learn of specific content needs.

If you have questions about the goal process, please e-mail apfa@clemson.edu for process questions or DMadmin@clemson.edu for technical questions.

Melissa Welborn, Faculty Systems Administrator

Chelsea Waugaman, Faculty Affairs Project Director
Amy Lawton-Rauh, Associate Provost for Faculty Affairs

1) Enter New Goals into FacultySuccess

Getting Started

☐ [Log into Faculty Success](#) and click on the "Activities" tab in the orange bar. The second section is titled "Administrative Data." Look to the right and you will see the "Workload/Goals" section.

☐ At this point, depending on when you started at Clemson, you may see goals for more than one year listed, potentially going back to 2019-2020. Do a quick check and make sure that the submitted date falls in the correct range. If the date is missing or outside of this range, the reports may not work. There should only be one row per academic year.

☐

2023-2024	May 16, 2023 – May 15, 2024
2022-2023	May 16, 2022 – May 15, 2023
2021-2022	May 16, 2021 – May 15, 2022
2020-2021	May 16, 2020 – May 15, 2021

You should only have one file per year. If you see multiple files for one year, please consolidate them into one. If you need assistance with this, please contact DMadmin@clemson.edu.

If you want to copy your goals from a previous year as a starting point (in this example, "2020-2021"), click the box circled in red in the picture below, and the "Duplicate" button circled in blue below will become available and you can click on it. (If you do not check a box, it will be grayed out.) Click "Duplicate" and it will create and open a new record based on last year's goals.

☐ Change the year to 2023-2024
☐ Edit the goals to reflect this coming year
☐ Remove the reflections that you entered last year

If you do not want to copy goals from last year, click "Add New" (highlighted in yellow below), and it will open a new goal screen.
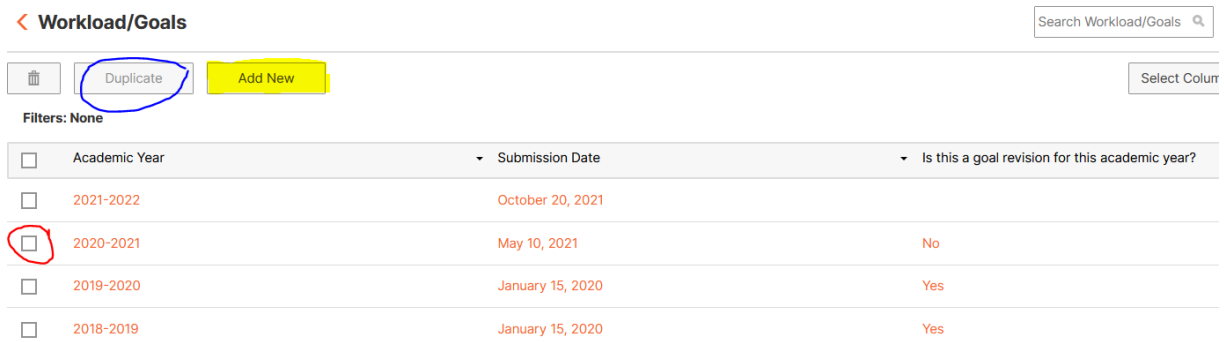
Adding New Goals

☐ At the top of the page, you will enter your submission date, which assigns this set of goals to a specific academic year. Academic years run May 16 – May 15 (for the 2023-2024 academic year the date range is May 16, 2023 – May 15, 2024). Use a date that falls within that timeframe, regardless of the date you drafted and submitted it.

Edit Workload/Goals

Please do not modify a set of goals to change the year and reuse it. Start a new set of goals. If that was your intent, cancel out of this action, return to the home page of this section, and choose "Add new item." If you want to start from a copy, click cancel, return to the home page, click the checkbox at the far right, and choose the duplicate icon.

Academic Year

2021-2022

The submission date must fall within the academic year range, which is May 16, 20xx - May 15, 20xx. Do not change the submission date when you enter goal reflections. A goal revision must be approved by the department chair.

Submission Date

Month*	Day	Year*
October	20	2021

☐ Complete the "Teaching % Proposed," for each semester, as shown below, and complete the teaching goal. Numeric and narrative information, or both, may be needed. The "Teaching % Actual" and "Teaching Reflection" section should be left blank until preparations for the 2023 Annual Review, when you will add your reflections on your goal completion progress. The percentage total should add for the semester, so in the fall semester, all percentages should add to 100%.

Teaching % Proposed

Summer Teaching Proposed	Fall Teaching Proposed	Spring Teaching Proposed
%	%	%

Teaching Goal

B *I* U x² x₂ ↺ C ↗

☐ Complete the "Research % Proposed," "Service % Proposed" and "Administrative % Proposed" sections. Complete "Extension % Proposed" and "Librarianship % Proposed" if those sections are applicable. Numeric and narrative information, or both, may be needed. The "Actual" and "Reflection" sections should be left blank until preparations begin for the 2023 Annual Review, when you will add your reflections on your goal completion progress. See the example below for Research, Service and Administration.

Edit Workload/Goals   Cancel   💾 Save   💾 Save + Add Another

Research % Proposed

Summer Research Proposed	Fall Research Proposed	Spring Research Proposed
___ %	25 %	40 %

Research % Actual

Summer Research Actual	Fall Research Actual	Spring Research Actual
___ %	___ %	___ %

Research Goal

B *I* <u>U</u> x² x₂ ↺ ↻ ↗

Fall 2020
- Install solo exhibition at _____ and present artist talk
- Submit proposal for _____ panel at NCECA
- Continue X series toward future exhibition in Fall 2021
- Studio visit with ____
- Submit exhibition proposal to X gallery / institution

Spring 2021
- Work with PI X on ___ CU SEED project in research lab
- Develop NCECA proposal and journal article for presentation at conference
- Present paper at CAA
- Apply to national and international juried exhibitions

Research Reflection

B *I* <u>U</u> x² x₂ ↺ ↻ ↗

Edit Workload/Goals   Cancel   💾 Save   💾 Save + Add Another

Service % Proposed

Summer Service Proposed	Fall Service Proposed	Spring Service Proposed
___ %	15 %	20 %

Service % Actual

Summer Service Actual	Fall Service Actual	Spring Service Actual
___ %	___ %	___ %

Service Goal

B *I* <u>U</u> x² x₂ ↺ ↻ ↗

- Advise undergraduate BFA students
- Update advising for BA students
- Serve on ___ (Dept, College, University committees)
- Act as external reviewer for ____ granting agency
- Blind peer review for ____ journal
- Juror for ____ exhibition
- Board / Commissioner / other external service
- Community service

Service Reflection

B *I* <u>U</u> x² x₂ ↺ ↻ ↗

Administrative % Proposed

Administrative % Proposed

Summer Administrative Proposed | Fall Administrative Proposed | Spring Administrative Proposed

[ ] % | [ ] % | [ ] %

Administrative % Actual

Summer Administrative Actual | Fall Administrative Actual | Spring Administrative Actual

[ ] % | [ ] % | [ ] %

Administrative Goal

B I U x² x₂ ↺ ↻ ↗

Administrative Reflection

B I U x² x₂ ↺ ↻ ↗

☐ Finally, look up at the upper right corner and click "Save." Do not choose "Save + Add Another," as that would create multiple goal records. You only want one goal record for the year.

☐ You have completed your goal entry for the year.

☐ To run a report of the goals you have entered choose "Rapid Reports" in the upper right corner of the Activities section of FacultySuccess. Choose the "Workload and Goal Report" section in the drop-down menu. This goals report will also be included in the workflow process that will open up in December. Change the dates to May 16, 2023 – May 15, 2024.

The snapshot below shows the location of "Rapid Reports," at the top of any screen (see the yellow highlight).

☐ Each goal entered should have a submitted date visible on the page where you entered Workload/Goals, and the date should be within the date range for the year. If you find this is not the case, please open the goal record and add a submission date that falls within the May 16 – May 15 review cycle. If the date is entered and appropriate goals are still not showing in the report, please contact DMAdmin@clemson.edu for technical assistance.

2) Submit Goals to Department Chair

Once goals have been created, they must be submitted so the department chair can review and approve. This submission takes place in Workflow, and the process name is 2022-23 Goal Approval.
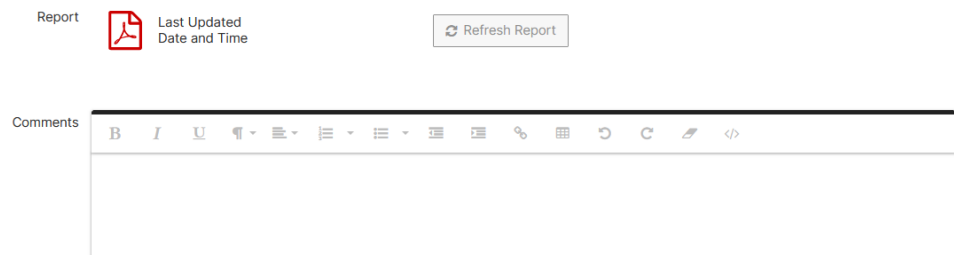
In general, this process applies primarily to full-time faculty, although some department chairs may request that part-time faculty go through this process. If you have been requested to submit goals but do not see a process in your workflow/inbox, reach out to dmadmin@clemson.edu.

When you open the process, you will see a form that looks like this:

Goal Submission

Please submit your goal report below. Preview report to ensure goals are appearing. Make sure the submitted date for the goals is between **May 16, 2022 - May 15, 2023**.

Instructions for submitting goals can be found on the **DM Resource Page**.

Report   Last Updated Date and Time   ↻ Refresh Report

Comments   B   I   U   ¶ ▾   ≡ ▾   ≣ ▾   ≔ ▾   ⥮   ⥯   ⧉   ⊞   ↺   ↻   ✍   </>

Click the pdf to view the report pre-loaded. You will need to refresh the report to pull in the most recent information. Refresh, and then check the pdf again. Make sure that your goals are pulling in as expected. If they are not, it is more than likely a date issue. You should only have one goal record with a date between May 16, 2023 – May 15, 2024. Make sure your dates are in the appropriate range for each year. Once you are happy with the report, in the upper right-hand corner, Choose Submit to DChair Review Goals.

After the department chair reviews your goals, the process returns to the faculty response step. This can stay in your inbox until December, when you determine there will not be any revisions. At that point, if there is no revision, choose the action Complete/Final Goals. Continue reading if you need a revision.

3) Revising Goals in December

Before revising goals, you must check with your department chair.

To revise a goal, log into FacultySuccess, click on the "Activities" tab in the orange bar. Scroll until you see the section titled "Administrative Data." Click there and look to the right and you will have found the "Workload/Goals" section.

Click on the academic year of the goals you wish to revise.

Edit any of the goals or reflections sections and select save at the upper right corner. Verify that the submission date is in the correct goal range, May 16, 2023 – May 15, 2024, and, if it is, do not change it.

Note that revisions must be approved by department chairs, so have a conversation with them before you make edits. If you want a formal approval of the revision, contact DMAdmin@clemson.edu to request a goal revision workflow. This workflow will only be launched upon request. If a revision workflow is launched, the submission process will be the same as the initial submission.