Goal Setting Process – 2022-2023

General process summary:

Workload goals for Academic Year 2022-2023 may be submitted any time through launching of the process in early May until October 18. If necessary, faculty can discuss revising AY2022-23 goals with their department chair and revise in FacultySuccess (formerly Digital Measures). Revisions require department chair approval and all changes must be finalized by January 11, 2023.

In preparation for the 2023 Annual Review, which will take place summer-fall 2023, faculty must declare their scholarly goals for their areas of responsibility such as research, teaching, service, administrative duties, extension, and librarianship (as applicable) at the start of the 2022-2023 academic year. As explained below, faculty work with their department chairs to agree upon the balance of goals that align with faculty areas of focus and workload alongside changing departmental needs (example: teaching loads or new administrative duties). Goals and Workload must be finalized so they can be used in the summer-fall 2023 annual review cycle reviewing the 2022-2023 cycle.

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 2022-23 Goal Approval. (Due 10/18)
3) Revising 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.

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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.

![Administrative Data](image)

- 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:

<table>
<thead>
<tr>
<th>Year Range</th>
<th>Submitted Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2019-2020</td>
<td>May 16, 2019 – May 15, 2020</td>
</tr>
<tr>
<td>2020-2021</td>
<td>May 16, 2020 – May 15, 2021</td>
</tr>
<tr>
<td>2021-2022</td>
<td>May 16, 2021 – May 15, 2022</td>
</tr>
<tr>
<td>2022-2023 (new this year)</td>
<td>May 16, 2022 – May 15, 2023</td>
</tr>
</tbody>
</table>

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 2022-2023
- 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 up 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 2022-2023 academic year the date range is May 16, 2022 – May 15, 2023). Use a date that falls within that timeframe, regardless of the date you drafted and submitted it.

- 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%.
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.
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, 2022 – May 15, 2023.

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 DMAadmin@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.

The submission is done through Workflow and applies to full-time faculty only.

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

![Goal Submission Form](image)

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, 2022 – May 15, 2023. 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, 2022 – May 15, 2023, 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 revise your goals, go back to Workflow/Inbox, and you should see the previously approved goals from when you submitted them in October. Open that process and refresh the report. Verify that your changes are there. It may be helpful to add a summary of changes in the comments. Then choose submit to DChair Review Goal Revision. Below is a picture of that screen: