

Facilitating a Goal-Setting Faculty/Staff Meeting Using the myFolio Goal Wizard

The new Goal wizard in myFolio facilitates a guided goal-setting process for faculty and staff. Drawing on behavioral economics principles around habit formation and goal attainment, this feature walks faculty/staff through a scaffolded set of questions to help them build goals and related action items.

Goal Wizard Questions

- 1 Select a theme.
- 2 What challenges do you currently face at work (related to this theme)?
- 3 Choose one challenge to work on for this goal. Why is this challenge important?
- 4 What factors are in your control that may help you undertake this challenge?
- 5 What obstacles may you encounter?
- 6 If someone approached you with these obstacles, what advice would you give?
- 7 Write out your goal question: "How might I _____ in order to _____?"
- 8 How will you define progress?
- 9 Jot down your first few action items to complete (and due dates).

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Agenda Option 1: Thought-partnership

In this approach, faculty/staff first go through the entire Goal Wizard on their own, either before the meeting or in the first 10-15 minutes of the meeting. Ask them not to complete the process, but rather to save their goal in myFolio as a draft. Next, assign faculty/staff members to groups of two to four colleagues -- these groupings could be within departments, although we tend to find the most value in cross-departmental grouping, because of the resulting diversity of thought. Within those groupings, each member is allotted 5-10 minutes, during which they briefly share their goal (or one of their goals, if they have already created more than one) and how they came to it, and then ask their group three questions:

1. "What do you value about my goal?"
2. What do you wonder about my goal?"
3. What advice do you have for me about achieving my goal?"

It will be important for each group to have a timekeeper to keep the group on task. After the breakout groups, call the faculty/staff back together and give them 10 minutes to silently revise, complete, and save their Goal Wizard work, integrating ideas and feedback from their group. If time is available, we recommend you ask for volunteers to reflect out loud about their experience creating goals in this way. Ask faculty/staff to create additional goals themselves after the meeting.

Agenda Option 2: Theme-based pre-processing

In this approach, ask faculty/staff to come to the meeting having selected one of the school Themes to focus on in the activity. This could be the Theme they are most interested in, or the one they find most challenging.

- ▶ Subdivide meeting participants into groups of two or three, where all members of each group have pre-selected the same theme.
- ▶ Have the groups begin by having a conversation (10-15 min) about the following questions:
 - "Why did you select this theme?"
 - "What challenges do you face regarding this theme?"
 - "With respect to this theme, where do you feel stuck and where do you feel hopeful?"

Following this conversation, ask individuals to work their way through the Goals Wizard (15 min), and then bring their goals back to the group. Upon returning to the group, members should share the goal and actions they came up with and their hopes and fears related to their identified goal and actions. Ask faculty/staff to create additional goals themselves after the meeting.

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Agenda Option 3: Modeled goal-setting

In this approach, the facilitator logs into myFolio on a projected or shared screen and models the goal-setting process for faculty/staff. Faculty and staff should be logged into their own myFolio accounts as well. It's worth noting at the start of the process that a goal can always be saved as a draft, so anyone who feels that they need more time is welcome to return to any of the questions later and add more depth.

The facilitator starts by adding their own goal, picking a theme, and verbally walking through the “identify your challenges” screen. Then pause and give faculty/staff five minutes or so to silently work through the same process on their own. Ask them not to proceed to the next screen, even if they are done.

After that time, the facilitator then moves on and models the questions on the “understanding your starting point” screen, ideally talking about why it's so important to consider reflection questions like this when setting goals. Then give the faculty/staff time to quietly respond to the questions on this screen. Pause here, and ask for a few people to share about the experience of doing this kind of reflection. Any surprises? Anyone want to share a challenge they've decided to tackle?

The facilitator then models the “write out your goal question” process and allows time for faculty and staff to do the same. Again, allow for some sharing out.

◆ Who would be willing to share a goal question with the group?

Finally, model the process of adding action items, and ask faculty/staff to do the same. Depending on your group, you may choose to do this step in a more “out-loud” fashion, perhaps sending members into departmental breakout groups to first share their goal, and then collaboratively help each other identify action items. Or, ask faculty/staff to again work individually and invite volunteers to share out afterwards. Ask faculty/staff to create additional goals themselves after the meeting.

Agenda Option 4: The interview

In this approach, assign pairings or allow faculty and staff to self-select into pairings. Provide each pair with a note-taking template based on the Goal Wizard questions at the top of this document.

- ◆ One at a time, each partner “interviews” the other, using the Goal Wizard questions.
- ◆ No computers are necessary, and interviewers should feel free to ask follow-up questions
- ◆ Let the interviewees talk freely—make the conversation rich, informative, and deep. Interviewers should avoid giving advice or asking leading questions—no matter what!

Allow these conversations to go on for 15+ minutes per person, then switch roles. By the end of the conversation, the interviewer should have collected notes that the interviewee can enter directly into the Goal Wizard after the fact.

