

## Goal Setting Process

### General process summary:

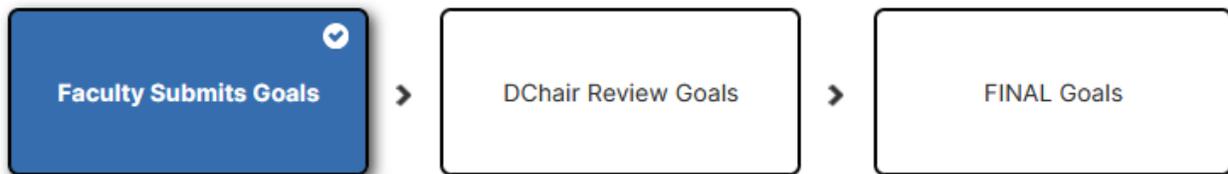
Faculty submit goals no later than mid-October for the academic year. Any revisions to goals require department chair approval and all changes must be finalized by mid-January. This goal information will be used in the Annual Review process.

Goals are grouped by area of responsibility, as applicable: research, teaching, service, administrative duties, extension, and librarianship. Ignore any sections that don't apply to your faculty appointment.

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 Goal Approval. (Due mid-October)
- 3) **Revise goals in December** (if applicable – needs approval, and due mid-January)

Overview of Goals Process



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. In general, goals should be a brief summary, not a multi-page detailed narrative. There is a limit of 20,000 characters in the narrative fields.

If you have questions about the goal process, please e-mail [apfa@clemsn.edu](mailto:apfa@clemsn.edu) for process questions or [DMadmin@clemsn.edu](mailto:DMadmin@clemsn.edu) for technical questions.

Check the calendar of dates and deadlines for specific dates:  
<https://www.clemson.edu/provost/faculty-affairs/deadlines.html>

# 1) Enter New Goals into FacultySuccess

## Getting Started

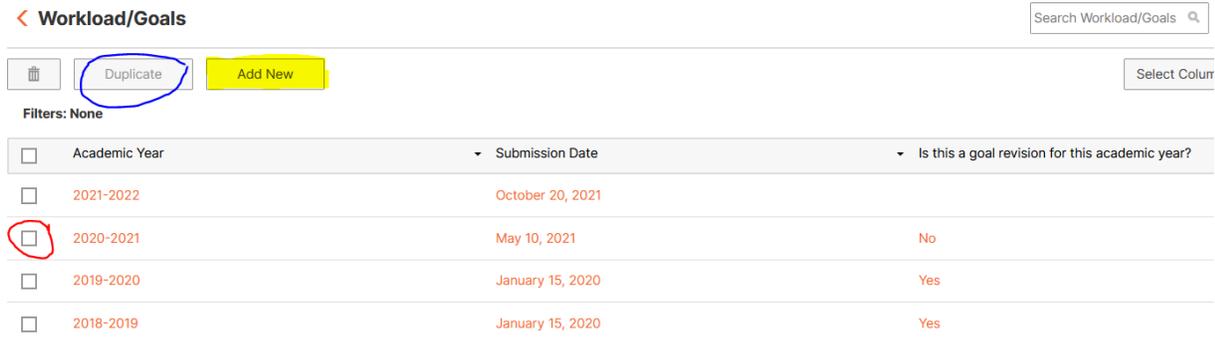
- [Log into Faculty Success](#) and click on the “Activities” tab in the orange bar. The second section is titled “Administrative Data.” Look to the right and you will see the “Workload/Goals” section.



- You should have only one file of goals allocated to each academic year. If you see multiple entries for one year, please consolidate them into one file. If you need assistance with this, please contact [DMadmin@clemsun.edu](mailto:DMadmin@clemsun.edu).
- Depending on when you started at Clemson, you may see goals for more than one year listed, potentially going back to 2019-2020. Make sure the goals date falls within the range shown for each academic year.

2024-2025	May 16, 2024 – May 15, 2025
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 may find it easier to copy goals from last year.
  - Click the check box beside last year’s record. (circled in red below)
  - Click the Duplicate button at the top of the page. (circled in blue below)
  - Edit the new record that opens.



**Workload/Goals** Search Workload/Goals 🔍

Duplicate  Select Colour

Filters: None

<input type="checkbox"/>	Academic Year	Submission Date	Is this a goal revision for this academic year?
<input type="checkbox"/>	2021-2022	October 20, 2021	
<input checked="" type="checkbox"/>	2020-2021	May 10, 2021	No
<input type="checkbox"/>	2019-2020	January 15, 2020	Yes
<input type="checkbox"/>	2018-2019	January 15, 2020	Yes

- Within that new goal record:
  - Update the academic year and the submission date.
  - Edit the goals to reflect this coming year’s goals/plans
  - Remove any reflections entered last year

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- If you do not want to copy goals from last year, click “Add New” (as illustrated in yellow in the image above), and it will open a new goal screen.

## Adding New Goals

- At the top of the page, you will complete the Academic Year and Submission Date fields to assign this set of goals to a specific academic year.

### Edit Workload/Goals

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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**

<b>Month*</b>	<b>Day</b>	<b>Year*</b>
October <span>⊕</span>	20	2021

- Complete the “Teaching % Proposed,” section 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 upcoming 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

<b>Summer Teaching Proposed</b>	<b>Fall Teaching Proposed</b>	<b>Spring Teaching Proposed</b>
%	%	%

Teaching Goal

B I U x<sup>2</sup> x<sub>2</sub> ↺ ↻ ↱

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- Repeat the same steps for Research, Service, Administrative, Extension and Librarianship.
- Click Save in the upper right corner of the page. 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. Change the dates to May 16, xxxx – May 15, xxxx.

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



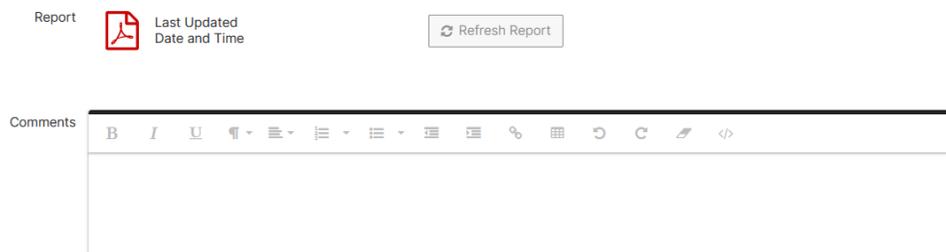
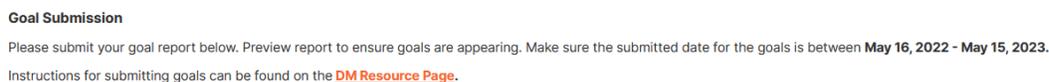
- Each goal entered should have a submitted date visible on the page where you entered Workload/Goals, and the date should be within the date range for the year. If you find this is not the case, please open the goal record and add a submission date that falls within the May 16 – May 15 review cycle.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

## 2) Submit Goals to Department Chair

Goals must be submitted to the department for review and approval. This submission takes place in Workflow, and the process name is 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, email [dmadmin@clemsn.edu](mailto:dmadmin@clemsn.edu).

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



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Click the refresh report button, and then once it has refreshed, click the PDF to view the report.

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, xxxx – May 15, xxxx. 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 and will automatically complete.

### 3) Revising Goals in December

Before revising goals, 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.

The image shows a screenshot of the 'Workload/Goals' table. The table has the following columns: Academic Year, Is this a goal revisi..., Teaching Goal, Teaching Reflection, Month, Submission..., Day, Submission D..., and Year, Submission... The table contains three rows of data:

<input type="checkbox"/>	Academic Year	Is this a goal revisi...	Teaching Goal	Teaching Reflection	Month, Submission...	Day, Submission D...	Year, Submission...
<input type="checkbox"/>	2020-2021	No	This is my goal.	This is my reflection.	May	30	2021
<input type="checkbox"/>	2019-2020	Yes	This is my teaching goal.	This is my teaching reflection.	January	15	2020
<input type="checkbox"/>	2018-2019	Yes	This is my teaching goal.	This is my teaching reflection.	January	15	2020

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, xxxx – May 15, xxxx, 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@clemsn.edu](mailto:DMAdmin@clemsn.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.

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