



# SETTING KEY DELIVERABLES

## LEADERS GUIDE

## INTRODUCTION

This guide is designed to help leaders prepare, draft, and finalize key deliverables in collaboration with their direct reports. Refer to this guide when setting new key deliverables and as often as needed throughout the check-in period.

Each school/unit has strategic objectives and priorities that need to be realized. Key deliverables align staff to each school's/unit's strategic objectives and operational priorities. They clarify what is expected of each staff member and what they are accountable for in their specific role. When key deliverables are clear and assessed consistently, staff can utilize their skills, abilities, and interests to achieve results.

### **KEY DELIVERABLES ARE FOUNDATIONAL FOR DRIVING PERFORMANCE EXCELLENCE.**

Key deliverables are:

- Major job responsibilities supporting strategic and operational priorities
- High stakes, high visibility, and/or urgent outcomes
- Important outcomes such as a discrete, one-time action or a recurring activity
- Milestone(s) within a larger and longer effort

Key deliverables are NOT:

- Performance improvement plans
- Career development goals
- Engagement goals
- Task lists

### **PRINCIPLES TO KEEP IN MIND**

Staff are most responsive and understand performance expectations best when key deliverables are established jointly between leaders and direct reports. Frequent conversations about performance build trust and open the door for discussing future opportunities that align with career aspirations. If you need additional support, please contact your central HRBP for guidance.

### **DRAFTING KEY DELIVERABLES WORKSHEET**

Each key deliverable will have a defined objective, time frame, and results. Use the following worksheet to draft key deliverables. All staff can register for an upcoming [Setting Key Deliverables](#) training session to learn more about how to define objectives, time frame, and results.

**STRATEGIC ALIGNMENT**

**What are the school/unit strategic objectives and priorities that the team can contribute towards this period? List 1-3 in the box below.**

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**Is there an upcoming or seasonal initiative that needs to be prioritized because of the urgency? List as many as you can think of in the box below.**

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**Of the objectives, priorities, and initiatives listed, what are the most important aspects the team needs to accomplish this period? List as many that come to mind.**

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## SPECIFICS OF THE KEY DELIVERABLE

Using notes from above, draft a key deliverable for a direct report that they can work on within the scope of their current role.

### DETERMINE THE OBJECTIVE

**An objective is a concrete outcome that you want to accomplish. Ensure the outcome supports one or more of the focus areas from above but also considers the direct report's interests, capabilities, and aspirations.**

**Example 1:** Source candidates for vacant positions.

**Example 2:** Provide support (scheduling, coordination, meeting minutes) for monthly leadership meetings.

### IDENTIFY THE TIME FRAME

**Time frame is the length of time that is needed to achieve the outcome(s). The objective is ideally able to be completed within the check-in period.**

**Example 1:** Within 3 weeks of posting.

**Example 2:** Schedule all meetings by December 1st, organize and distribute agenda one week prior to each meeting, distribute meeting minutes by the next business day.

**DEFINE THE RESULTS**

**What will be seen if the outcomes are successfully reached? Include criteria that specify quantity, quality, effectiveness, or other measures of success.**

**Example 1:** Source 10 qualified candidates for each position.

**Example 2:** Provide accurate meeting information, ensure meeting environment is prepared and issue-free, distribute accurate meeting minutes to all meeting invitees.

**PUTTING IT ALL TOGETHER**

**Draft key deliverables by combining the above objective, time frame, and results in the box below.**

**Example 1:** Source 10 qualified candidates for each opening within 3 weeks of posting the job.

**Example 2:** Schedule all upcoming leadership meetings by December 1st. Coordinate all meeting logistics including organizing and distributing the agenda no later than one week prior to each meeting and ensuring the meeting environment is prepared in advance and issue-free. Take accurate meeting minutes and distribute them to all meeting invitees by the next business day.

## FINALIZING KEY DELIVERABLES

As the next step, leaders and direct reports meet to review the key deliverables each have drafted and come to an agreement on the 1-5 deliverables the direct report will work on during the check-in period. It is important that leaders be open to their direct report's input and encourage them to share their point of view about why they chose their key deliverables.

**Step 1:** In advance of the conversation, leaders should share their draft with their direct report and ask that they do the same. Review their draft in advance, make notes, and identify questions for discussion.

**Step 2:** At the start of the meeting, provide a brief reminder of the key priorities. Then ask the direct report to share the key deliverable(s) they feel are most important or are most excited to work on.

**Step 3:** After thanking them for their input, ask clarifying questions about what was shared by the direct report to seek understanding. Acknowledge any key deliverables that address areas of focus or priority.

**Step 4:** Present the key deliverables drafted and provide the rationale for each. Ask for questions or feedback about the key deliverables presented. Be prepared to discuss how the direct report's role will align with the agreed upon key deliverables and seek buy-in for outcomes.

**Step 5:** Discuss the range of key deliverables with the direct report and confirm which key deliverables they will work on for the upcoming check-in period.

**Step 6:** Explore how the direct report plans to execute to accomplish deliverables. Discuss considerations such as timelines, contingencies, risks, stakeholders, etc. that may impact high quality completion and decide together any milestones that can be set.

**Step 7:** Close the conversation with a summary of key points and ask them if they have any questions. Thank the direct report for their input and close with a reminder that periodic check-ins on progress are expected and forthcoming during one-on-ones and check-in conversations.

**Step 8:** Enter key deliverables into the platform and sign-off when notified.