Unit 23: Setting and Meeting Targets at Work

Unit code: T/503/2849

QCF Level: Level 1

Credit value: 2

Guided learning hours: 20

Unit aim

This unit aims to provide learners with understanding of the importance of setting and meeting personal targets at work and for them to develop skills to set and review personal targets in line with organisational procedures.

Unit introduction

An understanding of personal targets within the workplace is a skill sought by many employers. The aim of this unit is to help learners understand the importance of setting and meeting targets at work. The unit looks at the benefits of individual and teamwork-related targets. Learners will learn how they can set and record appropriate personal targets in line with organisational procedures. They will also undertake a review of progress achieved against those targets and identify next steps for meeting personal targets.

Learning outcomes and assessment criteria

In order to pass this unit, the evidence that the learner presents for assessment needs to demonstrate that they can meet all the learning outcomes for the unit. The assessment criteria determine the standard required to achieve the unit.

Learning outcomes	Assessment criteria
1 Understand the importance of setting and meeting targets in the workplace	1.1 Explain the benefits of individual and team targets in the workplace 1.2 Describe how individual targets link to team targets
2 Be able to set personal targets in line with organisational procedures	2.1 Identify potential personal targets 2.2 Describe how to record personal targets in line with organisational procedures 2.3 Record and agree personal targets with an appropriate person
3 Be able to review personal targets in line with organisational procedures	3.1 Carry out a review of progress against personal targets in line with organisational procedures 3.2 Outline next steps towards meeting personal targets

Unit content

1 **Understand the importance of setting and meeting targets in the workplace**

Benefits of individual and team targets: benefits of individual targets eg sense of individual contribution and satisfaction, recognises individuals who reach targets, motivates individuals to take initiative and responsibility, encourages independent work; benefits of team targets eg help people achieve things that are difficult to achieve individually or without help of others, create a sense of morale and team spirit in a group, motivate people to work effectively together and develop interpersonal skills such as communication, tolerance

Links between individual and team targets: individual targets eg motivating, are reviewed to measure performance, the individual takes responsibility for their own performance, the individual target is part of a team target eg the individual should resolve five customer complaints daily in order to contribute to the team target; aspects of team targets eg to motivate a group of people, reviewed to measure performance of the team as a whole, usually draws on the individual targets of all the team members, team takes collective responsibility for performance

2 **Be able to set personal targets in line with organisational procedures**

Identifying appropriate personal targets: should be in line with the team/organisation's targets and procedures; should not be of benefit to self only, but should also benefit the team, other colleagues or the wider organisation

Recording personal targets: getting appropriate approval or agreement on the target/targets to be recorded; using appropriate organisational documentation and methods for recording personal targets eg using designated HR forms, appraisal forms, induction documents

3 **Be able to review personal targets in line with organisational procedures**

Follow organisational procedures in reviewing targets: use appropriate organisational procedures or methods eg performance reviews, informal discussions with a line manager, supervisor or tutor, target setting documents, self-assessment forms, feedback from other colleagues; obtain feedback and sign-off for the review from appropriate person eg line manager or supervisor

Identify progress made: use appropriate method or procedure to identify how much progress has been made eg complete self-assessment form, attend informal feedback discussion with line manager, compare outcomes of previous review with current outcomes; specify what progress has been made in relation to the target eg technical skills needed to reach the target have been acquired, attitudes or behaviours in relation to the target have improved, quality of work done has improved, 80 percent of all deadlines have been met

Next steps: identifying and reviewing any aspect of the targets still to be achieved; activities appropriate to achieving targets

Essential guidance for tutors

Delivery

The emphasis in this unit is on the setting and reviewing of personal and team targets in line with workplace practices or procedures.

Learners should be given practical examples and activities that illustrate how to identify targets, review targets and relate individual targets to the target of a wider team. A wide range of resources can be drawn on, for example interviews with human resources staff or line managers, role-plays, group discussions, presentations and case studies on target setting in real-life organisations, websites.

If the learner is in the workplace, tutors may find it helpful to deliver learning outcome 1 through the use of examples of target setting in the workplace, for example the learner's own team targets and the learner's own personal (individual) targets. (This could be the team in which the learner currently works or a team in which they might work in the future.) Alternatively, a simulated team scenario or a group's learning and development targets could be used.

In delivering learning outcome 2, a wide range of examples of workplace-related targets may be considered. These include targets in personal learning, training or a qualification that are likely to benefit learners in both a workplace and non-workplace setting.

Where a learner is not using formal documents specifically provided by their workplace, it would be helpful to consider a variety of types of organisational documentation relating to target setting, recording of targets and review of targets, for example written forms, PowerPoint presentations, graphs, flow-charts and diagrams. The use of discussion (for example appraisals and performance reviews) in linking personal targets to team or wider targets could also be raised. Video, presentations or role-work could be used to illustrate the discussion aspect.

Assessment

For 1.1, the learner must describe at least two benefits of team targets and two benefits of individual targets in the workplace. The learner should also demonstrate an understanding of how target setting cascades from organisation to individual.

For 1.2, the learner needs to describe two ways that the targets of the team (real–life or simulated) and targets of the individual within it are linked. For example, the team target will be reviewed to assess the performance of the team as a whole while the individual target will be reviewed to assess the performance of the individual, the individual's target relates to one aspect of customer service while the team target relates to more than one aspect of customer service.

The learner needs to identify independently at least two potential personal targets for 2.1, although they may discuss and agree them with their tutor or line manager before recording it formally. For learners in the workplace, the targets could relate directly to their specific workplace situation or to the workplace in general. Where learners are not in the workplace, they may wish to identify personal targets which relate to skills or goals that would be useful for the workplace (for example a qualification or learning programme). Personal learning targets could also be an appropriate choice for a learner in the workplace.

For 2.2, the learner must describe the basic organisational documents and procedures used in their organisation to set personal targets, for example personal development plans, personal or team objective forms, appraisal meetings with a line manager, annual organisational goals, self-assessment sheets. Where learners are in a simulated setting, they need to describe basic organisational documents and

procedures used to set personal targets in another appropriate organisation (for example documents that record personal learning or development targets of individuals in a college, school or place of learning).

In relation to 2.3, the learner must agree their targets with an appropriate person in advance of recording them. The targets could be agreed with a tutor, line manager, supervisor or appropriate work colleague. It is not necessary for learners to record their targets using formal documentation unless it is appropriate and useful to do so (for example the learner is in the workplace and undertaking a review of their objectives using formal documentation provided by the employer). Alternative methods may be used to evidence the learner's targets, for example a presentation, chart, poster, written statement provided by the learner, with supporting notes from the tutor/line manager.

For 3.1, the learner must, after an appropriate period of time, carry out a review of their progress against the identified targets, either with their tutor, line manager or appropriate work colleague to identify at least one aspect which has been achieved so far It is not essential for the learner to have completed all the steps necessary to achieve the targets but they need to be aware of progress being made towards them. The appropriate period of time can be agreed by the learner and the tutor, line manager (or other appropriate person) at the time of setting the targets. Where the learner is in the workplace, they should carry out this review of progress in a way which reflects the organisational procedures and requirements. This can either be through formal discussion in an appraisal or progress review or an informal discussion with their line manager, work colleague or tutor. If the review is carried out in a simulated setting, the learner need to carry this out in a way which reflects the organisational procedures of another appropriate organisation, for example their college, school or place of learning.

For 3.2, the learner must outline next steps or activities towards achieving their targets.

Evidence for 3.1 and 3.2 does not need to be recorded on formal workplace documentation unless it is appropriate and useful to do so. Appropriate alternative methods may be used, for example a presentation, chart, poster, written statement provided by the learner, with supporting notes from the tutor/line manager, evidence from tutorials or taped discussions verified by the tutor/line manager.

Links to other BTEC units, other BTEC qualifications and other relevant units and qualifications

This unit forms part of the *WorkSkills from Edexcel* suite. It has particular links with:

Entry Level	Level 1	Level 2
Unit 10: Self-assessment	Unit 10: Self-assessment	Unit 22: Setting and Meeting Targets at Work
Unit 16: Setting and Meeting Targets at Work	Unit 11: Career Progression	Unit 9: Self-Assessment
Unit 11: Career Progression		Unit 10: Career Progression

Essential resources

Learners need access to information about how to set and review personal targets and how to relate this to group targets.

Websites

www.jobseekersadvice.com

www.lifecoachexpert.co.uk

www.projectsmart.co.uk/smart.html