

Sample Performance Planning and Evaluation Form

First & Last Name:		Professional Title:	
Performance Year:			

Section 1: Division of Undergraduate Academic Affairs

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Section 2: Departmental Mission

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Section 3: Employee Goals

Use this section to create your goals for the year. Employee Goals will be evaluated during the Annual Review by both the Employee and their Manager. We generally recommend composing 3-5 goals.

A good starting place for setting goals is to consider your accountabilities to support the goals for your department or unit, as well as what activities make up the bulk of your work. From that point, consider what behaviors or skills are required to be successful and which of those can be improved on your part.

Consider goals that are related to the success of your department or unit, as well as personal development goals that support your career and feed back into your work.

A quality goal can have qualitative or quantitative outcomes and follows 'SMART' criteria; it will be Specific; Measurable; Attainable (given budgets, and other resources); Relevant to you and your work; and Time-bound to a specific date or set of dates for completion. The template below is designed to help you to create goals that meet these criteria.

GOALS TEMPLATE

Title of Goal: A brief introduction to the goal

Connection with Broader Goals:

Actions: What specific activities are required to meet this goal? Include dates, timelines, descriptions of deliverables, etc. How does this goal relate to your work and accountabilities?

Measurements: Describe how achievement of this goal is measured; how will you know that the goal has been met or exceeded?

Due Date: Choose a specific date when this goal should be successfully met.

Current Status: Use this field to update the status of the goal throughout the performance year.
Example: In Progress, Complete

Completion: Use this field to update the % completion of the goal throughout the performance year.
Example: 50%

Evaluation of Performance: To be completed by supervisor at end of review cycle.
Example: Excellent, good, needs improvement

GOAL #1
Title of Goal:
Connection with Broader Goals:
Actions:
Measurements:
Due Date:
Current Status:
Completion:
Evaluation of Performance: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Needs Improvement

GOAL #2
Title of Goal:
Connection with Broader Goals:
Actions:
Measurements:
Due Date:
Current Status:
Completion:
Evaluation of Performance: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Needs Improvement

GOAL #3
Title of Goal:
Connection with Broader Goals:
Actions:
Measurements:
Due Date:
Current Status:
Completion:
Evaluation of Performance: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Needs Improvement

GOAL #4
Title of Goal:
Connection with Broader Goals:
Actions:
Measurements:
Due Date:
Current Status:
Completion:
Evaluation of Performance: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Needs Improvement

GOAL #5
Title of Goal:
Connection with Broader Goals:
Actions:
Measurements:
Due Date:
Current Status:
Completion:
Evaluation of Performance: <input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Needs Improvement

Employee Signature:		Date:	
Supervisor Signature:		Date:	