Use the following template to document and track goals for the performance period.

* Create a minimum of 3 (three) goals
  + Ensure your goals are aligned with your position description responsibilities
  + If you have more than one direct supervisor, create a minimum of 3 goals with each supervisor
  + Ensure you have one goal which supports your development (areas to learn more about, improve your performance, etc.)
  + If you are supervisor, create one goal which focuses on leadership of your team (team development, providing feedback, etc.)
* As goals are created discuss possible obstacles which may hinder achieving the goal and/or resources needed to achieve the goal

Document and review your goals:

* Complete the template as the performance period progresses to document your results
* At the end of the performance period, finalize your documented results and determine your rating for each goal
  + Provide the completed document to your supervisor prior to your performance review discussion

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| **SMART Goals** | |
| **Specific** | The goal clearly states what is to be accomplished. Use specific action verbs in the goal, clarify (if needed) the end result, and indicate how it will be achieved or observed. |
| **Measurable** | The goal is measurable in some way to describe the desired results. How will you know when the goal is achieved or not? Time measure? Quality measure? Budget measure? |
| **Achievable** | The goals is challenging, yet within the employee’s area of control and responsibility. |
| **Relevant** | The goal is relevant to the needs of the university and the department. It should be relevant to the employee’s experience, skills, and abilities. |
| **Time Based** | The goal is accomplished within a defined time period. Deadlines and milestones are important and should be driven by the position’s needs. |

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| **Goal Ratings** | |
| **Exceeded** | All desired results were exceeded. Examples include going beyond desired results for quality, time, quantity, etc. |
| **Partially Exceeded** | Most of the desired results were exceeded and any desired results not exceeded were met. |
| **Met** | All desired results of the goal were met. |
| **Partially Met** | Some of the desired results of the goal were met. |
| **Did Not Meet** | None of the desired results of the goal were not met. |

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| Employee Name: |  |
| Position: |  |
| Department: |  |
| Date Goals Created: |  |
| Performance Review Period: |  |

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| **Goal Title/Name:** |
| **Describe the goal details using the SMART method.** |
|  |
| **Describe how the goal fulfills the department’s mission, vision, and/or objectives.** |
|  |
| **Describe how the goal fulfills the University’s mission, vision, and/or values.** |
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| **Goal Adjustments: if applicable (list any changes to the goal after it was created)** |
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|  |
| **Goal Adjustments: if applicable (list any changes to the goal after it was created)** |
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**Goal Tracking:**

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| **Goal Title/Name:** | |
| **Employee Self-Assessment** | **Leader Assessment** |
| **Describe the results or impact achieved.** | **Additional description of the results or impact achieved (as needed).** |
|  |  |
| **Document the challenges (internal and/or external) you encountered and what can be done differently next time.** | **Challenges you observed the employee faced while working towards the goal. Document how you supported the employee to overcome the challenges or what you can do going forward.** |
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| **Goal Rating:** | **Goal Rating:** |
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| **Goal Title/Name:** | |
| **Employee Self-Assessment** | **Leader Assessment** |
| **Describe the results or impact achieved.** | **Additional description of the results or impact achieved (as needed).** |
|  |  |
| **Document the challenges (internal and/or external) you encountered and what can be done differently next time.** | **Challenges you observed the employee faced while working towards the goal. Document how you supported the employee to overcome the challenges or what you can do going forward.** |
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| **Goal Rating:** | **Goal Rating:** |
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| --- | --- |
| **Goal Title/Name:** | |
| **Employee Self-Assessment** | **Leader Assessment** |
| **Describe the results or impact achieved.** | **Additional description of the results or impact achieved (as needed).** |
|  |  |
| **Document the challenges (internal and/or external) you encountered and what can be done differently next time.** | **Challenges you observed the employee faced while working towards the goal. Document how you supported the employee to overcome the challenges or what you can do going forward.** |
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| **Goal Rating:** | **Goal Rating:** |
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| **Goal Title/Name:** | |
| **Employee Self-Assessment** | **Leader Assessment** |
| **Describe the results or impact achieved.** | **Additional description of the results or impact achieved (as needed).** |
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| **Document the challenges (internal and/or external) you encountered and what can be done differently next time.** | **Challenges you observed the employee faced while working towards the goal. Document how you supported the employee to overcome the challenges or what you can do going forward.** |
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| **Goal Rating:** | **Goal Rating:** |
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| **Goal Title/Name:** | |
| **Employee Self-Assessment** | **Leader Assessment** |
| **Describe the results or impact achieved.** | **Additional description of the results or impact achieved (as needed).** |
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| **Document the challenges (internal and/or external) you encountered and what can be done differently next time.** | **Challenges you observed the employee faced while working towards the goal. Document how you supported the employee to overcome the challenges or what you can do going forward.** |
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| **Goal Rating:** | **Goal Rating:** |
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| **Additional Accomplishments (either within goals or competency based expectations):** | |
| **Employee Self-Assessment** | **Leader Assessment** |
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| **Additional Challenges (either within goals or competency based expectations):** | |
| **Employee Self-Assessment** | **Leader Assessment** |
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| **Employee’s Overall Self-Rating:** | **Leader’s Overall Rating:** |
| Did not meet  Partially met  Met  Partially exceeded  Exceeded | Did not meet  Partially met  Met  Partially exceeded  Exceeded |