



## Performance Management

### Instructions for Individual Goal Plans:

- Use multiple sources of information to prepare the Individual Goals Plan, including:
  - ◆ Job Description
  - ◆ Performance Expectations
  - ◆ Self Review
  - ◆ Service Delivery Standards
  - ◆ Business Unit Goals / Direction
  
- Define the Focus Area of the Goal, such as:
  - ◆ A. Customer Service
  - ◆ B. Profitability
  - ◆ C. Teamwork
  - ◆ D. Job Knowledge / Administration
  - ◆ E. General - (Must be defined and specifically stated using the Performance Review Form)
  
- All Goals must conform to the SMART criteria
  - ◆ Specific
  - ◆ Measurable (If you can't measure it – it's not specific enough)
  - ◆ Attainable or Achievable
  - ◆ Realistic and Relevant
  - ◆ Time Sensitive - (Specific beginning and ending dates)
  
- Work with the employee to determine specific training, tools or information needed to achieve the goal(s)
- Review Goals Plan progress and provide regular feedback and coaching to direct employee performance.
- File Goals in Employee Working File
- Incorporate Goal Plan results in Performance Review.



## Performance Management

### Individual Goals Plan

Focus Area	Goal	Measurement (Observation / Reports, etc.)	Information or Tools Needed	Goal Start Date	Goal End Date	Goal Achieved? Yes or No	Goal Review Date
				/ /	/ /		/ /
				/ /	/ /		/ /
				/ /	/ /		/ /

My manager and I have prepared and agreed upon the Goal(s) Plan above. I understand the goals will be periodically reviewed and revised as necessary. Employee's Name: \_\_\_\_\_ Employee #: \_\_\_\_\_

Employee's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ 200\_\_ Location: \_\_\_\_\_

Manager's Name: \_\_\_\_\_ Manager's Signature: \_\_\_\_\_ Date: \_\_\_\_\_ 200\_\_