

GOAL SETTING AND REVIEW FORM

Guidelines

Goal setting is important for our organization, as it provides focus on key initiatives that help the Harris School deliver on its mission, supports the implementation of operational efficiencies, and provides employees with valuable information related to performance expectations and organizational priorities. Goal setting enhances organizational and individual performance. When considering goals, please use the following framework, which organizes goals into three distinct dimensions: (1) Strategy and Program Evolution, (2) Internal and External Partnership, and (3) Execution and Capacity to Execute.

Dimension	Guiding Questions
Strategy and Program Evolution	<ul style="list-style-type: none"> What actions will you take to improve the programs, projects and/or services in which you are involved? How can you make a greater contribution? How do these actions support department and unit priorities? What processes, changes, partnerships and/or support are needed for you to deliver on these actions?
Internal and External Partnership	<ul style="list-style-type: none"> What existing or potential partnerships (inside or outside your team and/or the School) will help you make a greater contribution in your role? What will you do to initiate and/or cultivate these partnerships? How will these actions help your department/unit achieve its goals? How can you contribute positively to the teamwork in your area? How can you better support your colleagues and what they are trying to achieve?
Execution and Capacity to Execute	<ul style="list-style-type: none"> What actions can you take related to initiatives and/or projects that can improve the results and broaden the capacity of you and your area? What role can you play in supporting your area in executing key initiatives and projects? What skills do you need to develop in order to achieve your goals? What actions can you take to develop in these areas?

Use this **S.M.A.R.T.** goal format to ensure goals are focused on results and that outcomes can be measured.

Specific	Goals should be detailed, clear and concise.
Measurable	Goals should focus on the end result of an activity rather than effort. This end result or outcome can be described in terms of work completed and/or services provided.
Achievable	Goals should be challenging, yet within reach, to motivate performance.
Relevant	Goals should be appropriate for the role and individual. Goals should be aligned with and support achievement of the initiatives and priorities of the department, School, University.
Time specific	Goals should include key milestones and deadlines

The following are examples of **S.M.A.R.T.** goals within each of the 3 dimensions:

Example S.M.A.R.T. Goals	
Dimension	Goal
Strategy and Program Evolution	Conduct a program participant survey (with a sample size of at least 100) by November 1st for the purpose of identifying and implementing one program enhancement by June 30th
Internal and External Partnership	Form a collaborative, cross-departmental committee of 5-8 employees to plan and hold 2 all-staff team building retreats. Consult with unit leaders on retreat strategy and content
Execution and Capacity to Execute	Ensure 100% compliance with research protocols and safety guidelines for each project

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Each individual should have no more than five goals that are aligned with the Harris School and team goals. Throughout the year, managers should meet with their direct reports to check in on progress against goals, and modify as needed. Please use this form to document goals for the academic year.

Employee:	Click here to enter text.	Date:	Click here to enter text.
Manager:	Click here to enter text.		

Team Goals - discuss with your manager team goals:

- 1.
- 2.
- 3.
- 4.
- 5.

Individual Goals:		Percent Completion Definition: 0=No Progress, 40=Partial Completion, 80=Mostly Completed, 100=Fully Completed, >100=Exceeded Target		
Goal Setting (Beginning of Year)		Goal Review (End of Year)		
		Employee Comments	Manager Comments	Percent Completion
Goal 1	Click here to enter text.	Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0
Goal 2	Click here to enter text.	Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0
Goal 3	Click here to enter text.	Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0
Goal 4	Click here to enter text.	Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0
Goal 5	Click here to enter text.	Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0

Overall Goal Achievement (End of Year)		Percent Completion Definition: 0=No Progress, 40=Partial Completion, 80=Mostly Completed, 100=Fully Completed, >100=Exceeded Target	
Employee Comments	Manager Comments	Percent Overall Desired Development	
Click here to enter text.	Click here to enter text.	<input type="checkbox"/> >100 <input type="checkbox"/> 100 <input type="checkbox"/> 80 <input type="checkbox"/> 40 <input type="checkbox"/> 0	
Employee Signature: (Signature indicates Performance Appraisal meeting was held)		Date:	
Manager Signature:		Date:	