PERFORMANCE EVALUATION GUIDE OF EXAMPLE GOALS

The New Evaluation Tool Works Like This:

The first and last goals of the evaluation are created by the supervisor for their direct reports. The middle 3-4 goals are initially crafted by the individual being evaluated and submitted to their supervisor. After discussing the submitted goals with the employee, the supervisor has the opportunity to amend, modify, completely change, or eliminate any goal or component of a goal before it is submitted to HR. Supervisors may also request that employees rewrite and resubmit their goals following an initial discussion. Supervisors must discuss the goals with their individual staff members and both parties must sign off on the final goals that are submitted to Human Resources.

This guide serves as a tool to help you generate goal ideas related to the responsibilities of your position. The examples are meant to be broad so they can be personalized to meet your specific needs. The metrics tied to each goal are examples of how success could be measured and should be modified to match the expectations and challenges faced by you in your position. You do not have to use these examples to set your goals, but if you need ideas, the examples can help.

Before entering your goals into your evaluation, make sure you use the SMART technique to goal setting and be sure your goal meets the following criteria:

- **S** – Specific: concrete, detailed, well-defined
- **M** – Measurable: tangible evidence of achievement
- **A** – Attainable: challenging but realistic
- **R** – Relevant: aligned with personal, team, and agency goals
- **T** – Timely: deadlines that create sufficient urgency

You will use the goal title, description, and measurement to personalize your goals to your specific position when you enter them into the performance evaluation template. If you decide to use the goal examples provided in this document, the examples would fit in your goal’s measurement and ratings sections.
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### CLIENT ENGAGEMENT GOALS:

**Goal Measurement:**
Build better/more trusting relationships with stakeholders through frequent communication.

**Goal Rating:**
- **Excellent** = interacting with stakeholders at least 3 times per month
- **Success** = interacting with stakeholders at least 2 times per month
- **Needs Improvement** = interacting with stakeholders between 1-2 times per month
- **Unsatisfactory** = interacting with stakeholders fewer than once per month

**Goal Measurement:**
Conduct 12 community/client engagement activities annually that specifically capture input from diverse communities.

**Goal Rating:**
- **Excellent** = 12 engagement activities conducted, 6 of which capture input from diverse communities
- **Success** = 11 engagement activities conducted, 5 of which capture input from diverse communities
- **Needs Improvement** = 10 engagement activities conducted, 5 of which capture input from diverse communities
- **Unsatisfactory** = Fewer than 10 engagement activities conducted

**Goal Measurement:**
Design and launch an outreach strategy using social media to increase community usage of programs or services.

**Goal Rating:**
- **Excellent** = Social media presence launched on at least 2 platforms and 5+ posts made each week
- **Success** = Social media presence launched on one platform and 3 – 4 posts made each week
- **Needs Improvement** = Social media presence launched on one platform and 1 – 2 posts made each week
- **Unsatisfactory** = No social media presence

**Goal Measurement:**
Develop useful client information that can be added to a client website portal.

**Goal Rating:**
- **Excellent** = client website portal live with up-to-date information posted and 90-100% complete
- **Success** = client website portal live with up-to-date information posted and 75-89% complete
Needs Improvement = client website portal live with up-to-date information posted, but less than 75% complete

Unsatisfactory = client website portal information unprepared to go live

Goal Measurement:
Proactively meet with clients who may need support and identify development opportunities or learning activities for the client.

Goal Rating:
Excellent = met with 6 clients, identified 3 development opportunities
Success = met with 4-5 clients, identified 2 development opportunities
Needs Improvement = met with 2-3 clients, identified 1 development opportunity
Unsatisfactory = met with 0-1 clients, no development opportunities identified
CLIENT SERVICE GOALS:

Goal Measurement:
Create individualized project plans with program clients.

Goal Rating:
- **Excellent**: 90% of program participants have an established plan of action
- **Success**: 80-89% of program participants have an established plan of action
- **Needs Improvement**: 70-79% of program participants have an established plan of action
- **Unsatisfactory**: Fewer than 70% of program participants have an established plan of action

Goal Measurement:
Elicit satisfaction of program participants on relevant and timely communication and support, as measured by 1-5 survey ratings.

Goal Rating:
- **Excellent**: Aggregate satisfaction score of 4 or higher
- **Success**: Aggregate satisfaction score of 3-3.9
- **Needs Improvement**: Aggregate satisfaction score of 2-2.9
- **Unsatisfactory**: Aggregate satisfaction score of 1.9 or lower

Goal Measurement:
Provide support and tools necessary for clients to succeed, as measured by a survey.

Goal Rating:
- **Excellent**: 95%+ of clients felt they were given necessary support and tools
- **Success**: 80%-94% of clients felt they were given necessary support and tools
- **Needs Improvement**: 70-80% of clients felt they were given necessary support and tools
- **Unsatisfactory**: Fewer than 70% of clients felt they were given necessary support and tools

Goal Measurement:
Send email communication to clients regularly on status of project.

Goal Rating:
- **Excellent**: sending an average of 3 updates per month
- **Success**: sending an average of 2 to less than 3 updates per month
- **Needs Improvement**: send an average of 1 to less than 2 updates per month
- **Unsatisfactory**: sending <1 update per month
DATA COLLECTION GOALS:

**Goal Measurement:**
Data elements defined and data collection system completed in compliance with legislative or program requirements.

**Goal Rating:**
- **Excellent** = data elements defined and collection system 100% complete; guidance manual complete
- **Success** = data elements defined and collection system 80-99% complete; guidance manual complete
- **Needs Improvement** = data elements defined and collection system 60-80% complete; guidance manual complete
- **Unsatisfactory** = data elements defined and collection system less than 60% complete; guidance manual incomplete

**Goal Measurement:**
Identify new areas where data collection and analysis would be useful, conduct these data collections and report to stakeholders in a meaningful way.

**Goal Rating:**
- **Excellent** = 10+ new areas for data collection identified; data sets from all identified areas collected and reported to stakeholders on a regular basis
- **Success** = 7-9 new areas for data collection identified; data sets from all identified areas collected and reported to stakeholders on a regular basis
- **Needs Improvement** = 4-6 new areas for data collection identified; data sets from all identified areas collected and reported to stakeholders on a regular basis
- **Unsatisfactory** = Fewer than 4 new areas for data collection identified, collected, or reported to stakeholders regularly

**Goal Measurement:**
Generate useful data reports that can be distributed to the team on regular intervals (weekly, monthly, yearly).

**Goal Rating:**
- **Excellent** = generate 4 or more useful reports
- **Success** = generate 3 useful reports
- **Needs Improvement** = generate 1 to 2 useful reports
- **Unsatisfactory** = no new reports were generated
PROCESS IMPROVEMENT GOALS:

Goal Measurement:
Based on assessment data, identify best practices with potential for scaling and replication to increase program or process impact.

Goal Rating:
- **Excellent** = identify at least 3 best practices and report to clients
- **Success** = identify 2 best practices and report to clients
- **Needs Improvement** = identify 1 best practice and report to clients
- **Unsatisfactory** = no best practices identified or reported

Goal Measurement:
Create a guide to a process that is able to be utilized by internal or external clients.

Goal Rating:
- **Excellent** = the guide is 100% complete and distributed for usage to clients
- **Success** = the guide is 95%+ complete but not yet distributed to clients
- **Needs Improvement** = the guide is 75-94% complete
- **Unsatisfactory** = the guide is less than 75% complete

Goal Measurement:
Facilitate policy meetings, recommend policy to team members, and gain approval on beneficial policy.

Goal Rating:
- **Excellent** = 10 policies approved by the team
- **Success** = 8 or 9 policies approved by the team
- **Needs Improvement** = 6 or 7 policies approved by the team
- **Unsatisfactory** = fewer than 6 policies approved by the team

Goal Measurement:
Research, identify and implement ways to improve a particular process.

Goal Rating:
- **Excellent** = Document the process; identify 5 ways the process can be improved; implement 3+ process improvements
- **Success** = Document the process; identify 5 ways the process can be improved; implement 1-2 process improvements
- **Needs Improvement** = Document the process; identify 2-4 ways the process can be improved; implement 1-2 process improvements
- **Unsatisfactory** = Document the process; identify 1-2 ways the process can be improved; no process improvements implemented
PROJECT MANAGEMENT GOALS:

Goal Measurement:
All programs have comprehensive budgets and expenditure reports for administration of contracted services.

Goal Rating:
- **Excellent**: 100% of programs have budgets and expenditure reports
- **Success**: 90-99% of programs have budgets and expenditure reports
- **Needs Improvement**: 80-89% of programs have budgets and expenditure reports
- **Unsatisfactory**: 70-79% of programs have budgets and expenditure reports

Goal Measurement:
Development and implementation of new process or project

Goal Rating:
- **Excellent**: A comprehensive project/process developed and implementation plan created, including information about the process and implementation plan delivered to clients
- **Success**: A comprehensive project/process developed and implementation plan drafted but not delivered to clients
- **Needs Improvement**: Project/process and plan for implementation 85%+ complete
- **Unsatisfactory**: Project/process and implementation plan less than 85% complete

Goal Measurement:
Initiate marketing plan, complete necessary contracts, and plan and prepare all resources so that a new program is ready to be launched.

Goal Rating:
- **Excellent**: All contracts, resources, and marketing are prepared for program launch
- **Success**: All resources and marketing are prepared for program launch; contracts are incomplete
- **Needs Improvement**: Marketing plan has been initiated; contracts and resources are incomplete
- **Unsatisfactory**: Program is not ready to launch; marketing plan has not been initiated, contracts and resources still need to be completed and prepared

Goal Measurement:
Provide guidance and project management so that all projects I am involved in can successfully meet designated timelines and quality expectations of deliverables.

Goal Rating:
- **Excellent**: 100% of projects are completed and delivered on time
- **Success**: 95-99% of projects are completed and delivered on time
- **Needs Improvement**: 85-94% of projects are completed and delivered on time
- **Unsatisfactory**: Fewer than 85% of projects are completed and delivered on time
SUPPORT RESPONSIBILITY GOALS:

Goal Measurement:
Attend related training sessions and execute accurate practices of SPOTS and Travel reservations.

Goal Rating:
- **Excellent** = Attendance at both SPOTS and Travel training completed; No mistakes made regarding the handling of SPOTS/Travel
- **Success** = Attendance at both SPOTS and Travel training completed; 1-3 mistakes made regarding the handling of SPOTS/Travel
- **Needs Improvement** = Attendance at both SPOTS and Travel training completed; 4-6 mistakes made regarding the handling of SPOTS/Travel
- **Unsatisfactory** = SPOTS and/or Travel training incomplete; more than 6 mistakes made regarding the handling of SPOTS/Travel

Goal Measurement:
Communicate all budget index codes as they change throughout the year and be able to answer questions of every budget code and its use.

Goal Rating:
- **Excellent** = 100% of changes communicated with stakeholders and 100% of budget code questions answered
- **Success** = 90-99% of changes communicated with stakeholders and 90-99% of budget code questions answered
- **Needs Improvement** = 80-89% of changes communicated with stakeholders and 80-89% of budget code questions answered
- **Unsatisfactory** = fewer than 80% of changes communicated with stakeholders and fewer than 80% of budget code questions answered

Goal Measurement:
Successful management of regular meeting facilitation, including meeting rooms and times

Goal Rating:
- **Excellent** = 95%+ of recurring meetings have a consistent location and time that meets participant needs and zero complaints received
- **Success** = 85-94% of recurring meetings have a consistent location and time that meets participant needs and 1-2 complaints are received
- **Needs Improvement** = 75-84% of recurring meetings have a consistent location and time that meets participant needs and 3-4 complaints are received
- **Unsatisfactory** = Fewer than 75% of recurring meetings have a consistent location and time that meets participant needs and more than 4 complaints are received

Goal Measurement:
Support the team by creating and formatting documents in Word, Excel, and PowerPoint by the necessary deadlines.
Goal Rating:

**Excellent** = 100% of Word, Excel, and PowerPoint requests complete by deadline

**Success** = 95%+ of Word, Excel, and PowerPoint requests complete by deadline

**Needs Improvement** = 85-94% of Word, Excel, and PowerPoint requests complete by deadline

**Unsatisfactory** = Fewer than 85% of Word, Excel, and PowerPoint requests complete by deadline
TEAM LEAD GOALS:

Goal Measurement:
Identify projects, ideas, or initiatives you can become involved in as a leader throughout the year.
Goal Rating:
- **Excellent** = identify and participate in 5+ leadership opportunities
- **Success** = identify and participate in 3-4 leadership opportunities
- **Needs Improvement** = identify and participate in 1 or 2 leadership opportunities
- **Unsatisfactory** = no leadership opportunities identified or participated in

Goal Measurement:
Propose new ideas that expand the impact of the team
Goal Rating:
- **Excellent** = 5+ developed ideas proposed to the team
- **Success** = 3 or 4 developed ideas proposed to the team
- **Needs Improvement** = 1 or 2 developed ideas proposed to the team
- **Unsatisfactory** = no developed ideas proposed to the team

Goal Measurement:
Team members under my lead should be fully aware of documentation or processes and be trained on utilizing all documentation or following all processes.
Goal Rating:
- **Excellent** = check in with all team members monthly to answer questions, provide updates on processes, and ensure consistent standards are followed
- **Success** = check in with all team members at last bi-monthly to answer questions, provide updates on processes, and ensure consistent standards are followed
- **Needs Improvement** = check in with all team members at least quarterly to answer questions, provide updates on processes, and ensure consistent standards are followed
- **Unsatisfactory** = check in with team members fewer than 4 times per year to answer questions, provide updates on processes, and ensure consistent standards are followed
TECHNICAL ASSISTANCE GOALS:

Goal Measurement:
Average percent of time spent on a specific project/issue each week, while keeping all other responsibilities up to date.

Goal Rating:
- **Excellent** = >40% of time spent on project or issue
- **Success** = 25-40% of time spent on project or issue
- **Needs Improvement** = <25% of time spent on project or issue
- **Unsatisfactory** = other responsibilities are not kept up to date

Goal Measurement:
Create and publish a standards alignment document and related materials and survey clients on their implementation of the standards at professional development and stakeholder engagement events.

Goal Rating:
- **Excellent** = 85%+ of practitioners surveyed report implementation of aligned standards
- **Success** = 70-84% of practitioners surveyed report implementation of aligned standards
- **Needs Improvement** = 55-69%+ of practitioners surveyed report implementation of aligned standards
- **Unsatisfactory** = fewer than 55% of practitioners surveyed report implementation of aligned standards

Goal Measurement:
Prepare program participants to implement new or changing participation standards

Goal Rating:
- **Excellent** = training and TA developed and delivered to 100% of program participants
- **Success** = training and TA developed and delivered to 90-99% of program participants
- **Needs Improvement** = training and TA developed and delivered to 80-89% of program participants
- **Unsatisfactory** = training and TA developed to fewer than 80% of program participants

Goal Measurement:
Training and Technical Assistance successfully delivered to clients.

Goal Rating:
- **Excellent** = 5 webinars, 10 face-to-face meetings with clients and 3 statewide meetings facilitated
- **Success** = 3 webinars, 7 face-to-face meetings with clients and 2 statewide meetings facilitated
Needs Improvement = 2 webinars, 5 face-to-face meetings with clients and 1 statewide meeting facilitated
Unsatisfactory = 1 or 0 webinars, fewer than 5 face-to-face meetings with clients and no statewide meeting facilitated
TRAINING GOALS:

Goal Measurement:
Attend training sessions/webinars related to current project. Apply what is learned to current project. Share knowledge and experience with the team.

Goal Rating:
- **Excellent** = Attend 4 training events, apply knowledge to 2 projects, share experience with the team
- **Success** = Attend 2-3 training events, apply knowledge to 2 projects, share experience with the team
- **Needs Improvement** = Attend 1-2 training events, apply knowledge to 1 project, share experience with the team
- **Unsatisfactory** = Attend 0 or 1 training events, knowledge is not applied to projects, experience is not shared with team

Goal Measurement:
Increase ability to deliver satisfactory learning sessions through training/facilitation, as measured by a 4 point scale on participant surveys

Goal Rating:
- **Excellent** = Average satisfaction rating of 3.5-4
- **Success** = Average satisfaction rating of 3-3.4
- **Needs Improvement** = Average satisfaction rating of 2.5-2.9
- **Unsatisfactory** = Average satisfaction rating of 2-2.4

Goal Measurement:
Increase content knowledge or abilities of training participants as identified by post-training surveys

Goal Rating:
- **Excellent** = 90%+ of training participants report increased content knowledge or abilities
- **Success** = 80-89% of training participants report increased content knowledge or abilities
- **Needs Improvement** = 70-79% of training participants report increased content knowledge or abilities
- **Unsatisfactory** = fewer than 70% of training participants report increased content knowledge or abilities

Goal Measurement:
Select topics relevant to internal/external clients, research the topic, and train others on the topic so the knowledge can be utilized or implemented. Present 1 training topic per quarter.

Goal Rating:
- **Excellent** = 5 or more training topics selected, prepared and delivered
- **Success** = 3 or 4 training topics selected, prepared and delivered
Needs Improvement = 1 or 2 training topics selected, prepared and delivered
Unsatisfactory = No training topics delivered

Goal Measurement:
Train internal or external clients on new/updated/relevant information or processes

Goal Rating:
Excellent = 90-100% of the team or clients trained
Success = 80-89% of the team or clients trained
Needs Improvement = 70-79% of the team or clients trained
Unsatisfactory = fewer than 70% of the team or clients trained