

SAMPLE Goal Setting Template Management & Professional Staff

First & Last Name: Jane Shepard	Business Title: Consultant, Talent Development
Performance Year: 201X-1X	

Section 1 - Vision
The University of Calgary will be a global intellectual hub located in Canada's most enterprising city. In this spirited, high-quality learning environment, students will thrive in programs made rich by research and hands-on experiences. By our fiftieth anniversary in 2016, we will be one of Canada's top five research universities, fully engaging the communities we both serve and lead.

Section 2 – Mission
The University of Calgary is a place of education and scholarly inquiry. Its mission is to seek truth and disseminate knowledge. The University's aim is to pursue this mission with integrity for the benefit of the people of Alberta, Canada and the world.

Section 3 – Organizational Goals	
To view a detailed description of Eyes High, click here . To view a detailed description of U of C strategic goals, click here .	
Eyes High Goals <ul style="list-style-type: none"> Sharpen the focus on research and scholarship Enrich the quality and breadth of learning Fully integrate the university with the community 	University Strategic Goals <ul style="list-style-type: none"> Build leadership commitment and trust Increase respect and recognition Create an environment that results in one university family
Department/Unit Goals <ul style="list-style-type: none"> These goals articulate how each department or unit will contribute toward achieving the strategic goals of the university If you are unsure about what goals your department or unit have set for the year, speak with your supervisor. Knowing these goals will make it easier to draw connections between your own goals and those of the university as a whole. 	

Section 4 – 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. For more information on the Rating scale that will be used to evaluate goals, [click here](#). 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.

To learn more about setting goals, [click here](#) and navigate to the section on Goal Setting.

GOAL TEMPLATE

Title of Goal: A brief introduction to the goal in 100 characters or less

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%

EXAMPLE GOAL #1
Title of Goal: Implement revised learning program pilot for new employees
Actions: <ul style="list-style-type: none"> • Research best practices and compile a project plan that includes an outline of proposed course offerings and key learning objectives • Engage a representative group of employees to assess learning needs and present preliminary outlines. Incorporate feedback into development • Develop individual workshops including all materials and instructor notes • Schedule workshops and prepare/send invitations to the targeted pilot audience • Conduct pilot workshops and collect feedback on the outcomes • Assess feedback and incorporate into program revision for the program launch in the fall of 201X
Measurements: <ul style="list-style-type: none"> • Project plan, workshop outlines, focus groups, workshops, and evaluation document collection all completed on schedule and without significant delay • Overall participant satisfaction measured as 3/5 or greater on all elements • Feedback incorporated into program revision • Dates selected for open-enrollment program launch
Due Date: November 15, 2014
Current Status: In Progress
Completion: 0%

EXAMPLE GOAL #2
Title of Goal: Improve client service by improving response time to client inquiries via email by 20%
Actions: <ul style="list-style-type: none"> • Establish benchmark by conducting a poll of 20 clients, using SurveyMonkey, to determine their current satisfaction with response times. Indicate selection process of poll participants • Address all incoming correspondence within 24 business hours, either with a complete response and recommendation, or preliminary information and a promise to return with more information within a 24 hours • Conduct additional client satisfaction polls at 3-month and 6-month and 12 month marks, comparing to original poll.
Measurements: <ul style="list-style-type: none"> • Correspondence is responded to within 24 business hours. Goal considered exceeded if responses are within 24 hours or less more that 80% of the time • Improvement of client satisfaction (20%) is noted over the 12-month period. Goal considered exceeded if satisfaction is greater than 20% over 12months.
Due Date: March 31, 201X
Current Status: In Progress
Completion: 0%

EXAMPLE Goal #3
Title of Goal: Implement updates to L&D website to improve user experience
Actions: <ul style="list-style-type: none"> • Attend a Drupal 7 workshop, offered by IT Training, to increase my understanding of our websites and how to edit them • Work with colleagues to design updates and assess usage • Implement/develop design updates to website, including updated photos • Correct any outdated information • Create a new section of the website devoted to assisting clients with accessing self-service options and directing them to the right member of the team for individualized support • Follow-up in 3 months with a client satisfaction poll to determine the reception of the new website, as compared to baseline client satisfaction prior to the implementation
Measurements: <ul style="list-style-type: none"> • Drupal workshop attended • Design updates and corrections to outdated information made • New website section created and announced to clients. Goal will be considered exceeded if client satisfaction increases by 20% over baseline
Due Date: November 1, 201X
Current Status: In Progress
Completion: 0%

EXAMPLE Goal #4
Title of Goal: Improve time-management skills to support better client relationships
Actions: <ul style="list-style-type: none"> • Attend continuing education seminar, 'Building Great Customer Relationships', in August • Attend continuing education seminar, 'Time Management', in October Prepare an action plan for improving ability to prioritize tasks and projects by November 1
Measurements: <ul style="list-style-type: none"> • Seminars attended; shared lessons-learned with the rest of the team through one or more 30-minute presentations • Action plan created, vetted with manager, and implemented • Control over my workload is increased by 20% (recognition of more free time to review or work on new projects) Goal will be considered exceeded if feedback regarding session scheduling and materials readiness increases by 30% on average.
Due Date: April 30, 201X
Current Status: In Progress
Completion: 0%

EXAMPLE Goal #5
Title of Goal: Maintain processing times for invoices
Actions: <ul style="list-style-type: none"> • Sustain current response time for invoices by forwarding invoices in a timely manner (within 24 hours) and maintaining follow-up contact with client and accounts payable • Ensure client satisfaction by providing timely updates on payment status and following through on processing
Measurements: <ul style="list-style-type: none"> • Processing time for invoices remains within standard norms • 4 or less than 4 instances of negative feedback regarding processing of invoices, received from clients over the performance year • Goal will be considered exceeded if processing times decrease markedly to 12 hours or less on average and/or 1 or fewer instances of negative feedback received over the performance year
Due Date: April 30, 201X
Current Status: In Progress
Completion: 0%

EXAMPLE Goal #6
Title of Goal: Improve coaching skills to more effectively lead my team
Actions: <ul style="list-style-type: none"> • Attend continuing education seminar, 'Intentional and Purposeful Coaching' • Attend HR workshops on Performance Management • Hold monthly one-on-one meetings, for 1 hour on every second Monday of the month, with each of my team members to discuss current projects, recent successes, areas for improvement, and performance/career goals • Poll my team to determine their perception of my leadership strengths and areas for improvement in order to best support their needs and priorities • Work with other managers in my area to share coaching successes and areas for improvement to improve my coaching skills. Develop an action plan for fiscal 201X/1X
Measurements: <ul style="list-style-type: none"> • Seminars and workshops attended on {insert dates here} • Lessons shared with my colleagues, Johnny Appleseed and Lois Lane • Monthly meetings held regularly with little or no disruption or cancellations throughout the performance year • Action plans co-created with each employee to help direct their professional growth • 3-5 Goals set for each of my team members; outlining the resources/assistance necessary for those goals to be met • Bi-monthly meetings held with other managers in my area; coaching action plan created and executed
Due Date: April 30, 201X



UNIVERSITY OF
CALGARY

Current Status: In Progress
Completion: 0%