**ANNUAL PERFORMANCE PLAN AND EVALUATION**

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| --- | --- | --- | --- |
| NAME: |  | NETID: |  |
| POSITION: |  | COMPLETED DATE: |  |
| DEPT/AREA: |  |  |  |
| SUPERVISOR: |  |  |  |

**USING THIS TEMPLATE:** This template has been designed to facilitate a uniform, yet flexible annual performance planning and evaluation process for Dartmouth staff members. Your school/division may provide additional questions you and your supervisor will be expected to cover. When you and your supervisor are ready to copy and paste the completed plan and evaluation to upload to your Dartmouth employee file, please note that only paragraphs, line breaks, and bullets will transfer.

**ACCOMPLISHMENTS:** If you and your supervisor set goals, what progress have you made to achieve them? What did you do well and what allowed you to do so? How has your work contributed to advancing shared strategies and goals?

**CHALLENGES:** What has been challenging this past year? What makes your job more difficult than it should be? If any of your goals were not met, what help do you need to get back on track? Do you have everything you need to perform your job?

**WHAT’S NEXT:** What do you want to achieve next and what are your goals? Where do you see opportunities to excel, start something new, or stop things that no longer make sense? What support or direction do you need?

**SUPERVISOR EVALUATION:** How is your team member performing overall? What aspects of their job are they doing well? What guidance or support can you provide to help with the challenges they have identified? What direction or input can you provide about the plan for what’s next?

**GOAL-SETTING GUIDE**

**IMPORTANCE OF GOAL-SETTING**

Setting goals can help you:

* Excel in your work, start something new, or stop things that no longer make sense;
* Plan and implement successful projects and initiatives;
* Collaborate with your supervisor and colleagues with greater transparency and shared understanding; and
* Remain resilient when roadblocks arise and learn from these setbacks.

**SETTING EFFECTIVE GOALS**

As you develop and write down your goals, consider the following:

* **Rationale:** Why this goal now? What would we gain from achieving this goal? What would we lose if we don’t achieve it?
* **Intended results:** When and how will we and others know we succeeded?
* **Connection to other efforts:** How does this goal align with or advance broader initiatives or collective goals? How will others be involved, influenced, or affected?
* **Resources:** What resources are needed and at what cost? Should the goal be broken down into subgoals that can be resourced and achieved incrementally?
* **Possible roadblocks:** What possible roadblocks could arise? What can be done now to prevent those roadblocks or address them if and when they arise? Are there tradeoffs that can be made to get back on track?

**THE SMART MODEL**

The SMART model covers the same considerations listed above but framed in a way that may be easier for you to remember.

**S – Specific:** What would we gain from achieving this goal? What would we lose if we don’t achieve it?

**M – Measurable:** When and how will we and others know we succeeded?

**A – Attainable:** What resources are needed and at what cost? Should the goal be broken down into subgoals that can be resourced and achieved incrementally?

**R – Relevant:** How does this goal align with or advance broader initiatives or collective goals? How will others be involved, influenced, or affected?

**T – Time bound:** Why this goal now? What is the timeline for achieving it? What possible roadblocks could arise? What can be done now to prevent those roadblocks or address them if and when they arise? Are there tradeoffs that can be made to get back on track?