

Performance Goals, Learning Objectives & Performance Evaluation

Employee Information

Employee Name: _____

Position: _____

Manager: _____

Performance Goals

The table below outlines the goals set on a monthly or quarterly or yearly basis. The goals will be the result of a mutual agreement between the employee and the direct report. Ensure you write SMART goals (Specific, Measurable, Attainable, Relevant, and Timely).

GOAL	CHECK ONE OF THE BELOW			DELIVERABLE IF ANY	RESOURCES REQUIRED / PREREQUISITES
	MONTH	QUARTER	YEAR		

Learning Plan

The table below summarizes learning objectives that will be set on monthly basis. There will also be an evaluation at the end of each month. The activities required to achieve the learning objectives may include courses, job-embedded learning, or mentoring/coaching, etc...The learning plan should be aligned with the performance goals.

LEARNING OBJECTIVES	ACTIVITY REQUIRED	RESOURCES REQUIRED	COMPLETION DATE	EVALUATION CRITERIA / LEARNING ASSESSMENT PLAN

Performance Evaluation

The performance evaluation will be completed on a monthly basis and will be based on the performance goals and the learning objectives set prior to the evaluation. The performance evaluation should assess both interpersonal and technical skills and should be communicated with the employee with open room for suggestions and opportunities for improvement. Based on the performance evaluation results, new performance and learning goals will be set.

PERFORMANCE ASSESSMENT – COMMENTS AND NOTES – OPPORTUNITIES FOR IMPROVEMENT

Date: _____

Employee Name: _____

Employee Signature: _____

Manager Name: _____

Manager Signature: _____