

Goal Agreement Form

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| **SETTING GOALS FOR 2024-2025**  (*to be completed shortly after the performance appraisal discussion)* | | | | | | | | | | | | | |
| **EMPLOYEE INFORMATION** | | | | | | | | | | | | |
| Name: | Enter employee name | | | | | | Title: | Enter employee title | | | | |
| Dept.: | Enter department name | | | | | | UC Hire Date: | | | Enter UC Hire Date | | |
| Review Period: | | | *From* | Enter review from date | *Through* | | | | Enter review through date | | | |
| **GOALS AND OBJECTIVES** | | | | | | | | | | | | |
| **Purpose**:  The **Goal Agreement form** is used to document the agreement between the supervisor and the employee on 3-5 goals or objectives that are the most important priorities for the upcoming review period **(April 1, 2024 – March 31, 2025)**. Achievement of these goals by the employee *will significantly benefit the employee’s unit, department or organization.*  **Directions**:   1. The supervisor and employee will decide which of them will complete a first draft of the Goal Agreement form**,** suggesting 3-5 potential goals for the employee to accomplish during the next review period. 2. The supervisor and employee should meet shortly after the Performance Appraisal discussion to discuss the draft Goal Agreement form and to finalize 3-5 goals for the employee to accomplish during the upcoming review period. Each of the finalized goals should be of the most important priority, and of significant benefit or value to the employee’s unit, department or organization. 3. The finalized goals should be written below in the “Smart Goal” format found at the [Forms & Documents / Performance Management webpage](https://hr.ucr.edu/about-us/forms-and-documents/performance-managment-forms-documents). 4. The “Performance Checkpoints” section of the form is left blank, for now. Later, it will be used to document future discussions between the supervisor and employee regarding progress on goal achievement, and/or regarding any changes to the original goals. 5. **A copy of the finalized Goal Agreement form will be attached to the signed, completed Performance Appraisal form in the employee’s file. The supervisor and the employee each retain a copy of the finalized Goal Agreement form for their records and future discussion**. | | | | | | | | | | | | |
| **Goal** | | | | | | | **Due Date** | | | | **Key Milestones** | |
| gxsgxsg | | | | | | | Enter due date | | | | Enter key milestone here | |
| Enter goal here | | | | | | | Enter due date | | | | Enter key milestone here | |
| Enter goal here | | | | | | | Enter due date | | | | Enter key milestone here | |
| Enter goal here | | | | | | | Enter due date | | | | Enter key milestone here | |
| Enter goal here | | | | | | | Enter due date | | | | Enter key milestone here | |
| **PERFORMANCE CHECK POINTS** | | | | | | | | | | | | |
| The supervisor uses the following spaces to document discussions at each performance checkpoint during the review period. For each checkpoint, document the date, progress on goals, changes to goals (if applicable), and then the supervisor and employee add their initials to document the checkpoint. Add additional rows as needed. | | | | | | | | | | | | |
| **Date** | | **Progress on Goals** | | | | | **Changes and/or Comments** | | | | | **Initials** |
| Enter date here | | Enter progress goal here | | | | | Enter changes/comments on goal here | | | | | Initials |
| **Date** | | **Progress on Goals** | | | | | **Changes and/or Comments** | | | | | **Initials** |
| Enter date here | | Enter progress goal here | | | | | Enter changes/comments on goal here | | | | | Initials |
| **Date** | | **Progress on Goals** | | | | | **Changes and/or Comments** | | | | | **Initials** |
| Enter date here | | Enter progress goal here | | | | | Enter changes/comments on goal here | | | | | Initials |
| **Date** | | **Progress on Goals** | | | | | **Changes and/or Comments** | | | | | **Initials** |
| Enter date here | | Enter progress goal here | | | | | Enter changes/comments on goal here | | | | | Initials |
| **Date** | | **Progress on Goals** | | | | | **Changes and/or Comments** | | | | | **Initials** |
| Enter date here | | Enter progress goal here | | | | | Enter changes/comments on goal here | | | | | Initials |
| **AGREEMENT** | | | | | | | | | | | | |
| As documented by the following employee and supervisor signature/date, the goals outlined above are the most important priorities for this performance cycle. We commit to working towards achieving these goals and completing the performance checkpoints throughout the year. We understand that some goals potentially may change during the performance cycle due to shifts in organizational priorities and/or other factors. | | | | | | | | | | | | |
| **SIGNATURES** | | | | | | | | | | | | |
| **Employee Name** | | | | | | **Supervisor Name** | | | | | | |
| Enter Employee Name | | | | | | Enter Supervisor Name | | | | | | |

|  |  |
| --- | --- |
| **Employee Signature / Date** | **Supervisor Signature / Date** |
| Enter Date | Enter Date |