



Performance Plan_ (Employee's Name) FYXXX Goal Summary Instructions

This template was designed to facilitate the documentation and development of your performance goals.

Competencies: (List relevant competencies)

Competencies blend the knowledge, skills, and behaviors demonstrated by the successful employee. Competencies describes the "How" - how you do your job.

Click this [link](#) to see list of competencies for employees and this [link](#) to see the list of competencies for managers and supervisors. Select competencies for the appropriate list that applies to your work, to be added to your performance plan.

NOTE: Mandatory competencies must be added to performance plans. *In addition*, OHR recommends no more than four (4) or five (5).

- Examples:** Social Equity and Social Justice (RESJ) (Mandatory)
 Work Safe Environment (Mandatory)
 Customer Focus
 Expertise and Knowledge
 Productivity
 Teamwork

Objectives (expectations end results):

Objectives are based on daily tasks and responsibilities. Objectives describes the "What" – what you do, required outcomes. Objectives **must** be created as **SMART Goals**:

- Specific (clear and detailed)
- Measurable (observable)
- Attainable (challenging but reasonable)
- Relevant (in line with job duties and department goals)
- Time-bound (established times to be accomplished)

and **must** include:

- Objective Name
- Objective Details (description)
- Success Criteria (targets)

NOTE: OHR recommends no more than four (4) or five (5).

Examples:

Sample Objective 1:

Name: Report writing and presentations
 Details: Assist in the development of the Agency's annual and other reports/documents required by the Federal, State and County governments in addressing services provided to meet the needs of low income county residents.
 Success Criteria:
 Works with supervisor to produce a draft annual report by January 31, 2024
 Oversees the production and distribution of materials for each meeting.
 Contributes development and reporting as assigned.



Sample Objective 2:

Name: Provide staff support to the (Name) Team

Details:

Provide staff support to the (Name) Team. As the designated staff liaison, ensure that the teammates are able to fulfill yearly goals and objectives by providing meeting notice dates, recording minutes, transmitting meeting materials, meeting record keeping requirements and other duties:

Success Criteria:

- Coordinate and manage activities of the Team.
- Research and prepare fact sheets and background information that will inform the members on particular topics before each meeting.
- Serve as a liaison and provide administrative support by processing reimbursement requests
- Check in and keep supervisor updated on your progress by the end of each week.

Sample Objective 3:

Name: Develop, Empower and Support Employees

Details: Effectively manage and develop employee

Success Criteria:

- At a minimum, meet once a month with your employees to provide constructive feedback on their performance.
- Devote a minimum of 5% of your time each week in providing direct supervision and constructive feedback to your direct reports.
- Ensure all employees are attending mandatory training and recommended (relevant) training by the end of each quarter.
- Attend a management interpersonal skills course to improve communication and time management within 90 days.

Career Development Plan

Specify the area/skill requiring Improvement/Growth:

Career development encourages employees to continue to grow in their current positions or to plan their own career path/promotional objectives.

Sample Example1:

Complete the (Dept) Project Management Training Class by the end of the fiscal year, with funding provided by the department.

Sample Example2:

Successfully complete a Power BI course by the end of the current fiscal year and provide proof of certification.