# Duluth Area Family YMCA Performance GOAL SETTING Form

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| Review Period: |  |  |  |
| Employee Name: |  | Title: |  |
| Branch: |  | Department: |  |
| Supervisor’s Name: |  | Title: |  |

Instructions

The goal setting form is used to set performance expectations for the coming year. These goals will be used in the mid-year and year-end performance review periods.

SECTION 1: CORE FUNCTIONS

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| FUNCTION (Describe): | | | | |
| 1 BELOW EXPECTATIONS *(Describe)* | 2 DEVELOPMENT NEEDED | 3 MEETS EXPECTATIONS *(Describe)* | 4 EXCEEDS EXPECTATIONS | 5 FAR EXCEEDS EXPECTATIONS *(Describe)* |

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| FUNCTION (Describe): | | | | |
| 1 BELOW EXPECTATIONS *(Describe)* | 2 DEVELOPMENT NEEDED | 3 MEETS EXPECTATIONS *(Describe)* | 4 EXCEEDS EXPECTATIONS | 5 FAR EXCEEDS EXPECTATIONS *(Describe)* |

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| FUNCTION (Describe): | | | | |
| 1 BELOW EXPECTATIONS *(Describe)* | 2 DEVELOPMENT NEEDED | 3 MEETS EXPECTATIONS *(Describe)* | 4 EXCEEDS EXPECTATIONS | 5 FAR EXCEEDS EXPECTATIONS *(Describe)* |

SECTION 2: SMART GOAL SETTING

Goals and measures should be agreed upon and recorded at the beginning of the appraisal period. SMART goals typically flow from strategic or operating plans. Goals must be SMART (Specific, Measurable, Action-oriented, Results-focused, and Time-bound) and listed in order of importance. Obstacles and support should be outlined to help define the goal.

Each goal should (in most cases) be linked to a **strategic priority**:

• Youth Development (YD) • Healthy Living (HL) •Social Responsibility (SR) •Organizational Capacity (OC)

At the Annual Review, progress on these goals will be assessed using the following rating: 1 (Below Expectations); 2 (Development Needed); 3 (Meets Expectations); 4 (Exceeds Expectations); or 5 (Far Exceeds Expectations).

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| **GOAL #1** | **Tie it to a strategic priority** |
|  | *Choose from the priority list above:* |
| **Describe the goal:** | **Measurement:** *(a percent, a number, a deadline, etc.)* |
| **Obstacles to Meeting Goal** | **Support Needed to Accomplish Goal** |

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| **GOAL #2** | **Tie it to a strategic priority** |
|  | *Choose from the priority list above:* |
| **Describe the goal:** | **Measurement:** *(a percent, a number, a deadline, etc.)* |
| **Obstacles to Meeting Goal** | **Support Needed to Accomplish Goal** |

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| **GOAL #3** | **Tie it to a strategic priority** |
|  | *Choose from the priority list above:* |
| **Describe the goal:** | **Measurement:** *(a percent, a number, a deadline, etc.)* |
| **Obstacles to Meeting Goal** | **Support Needed to Accomplish Goal** |

SECTION 3: YMCA LEADERSHIP COMPETENCIES

Review the following competencies, which will comprise a significant component of the Annual Review. Select the competencies to be addressed in the coming year and add any comments regarding tasks or training that will be used to improve this competency.

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|  | VALUES |  |
|  | COMMUNITY |  |
|  | VOLUNTEERISM |  |
|  | PHILANTHROPY |  |
|  | INCLUSION |  |
|  | RELATIONSHIPS |  |
|  | INFLUENCE |  |
|  | COMMUNICATION |  |
|  | DEVELOPING OTHERS |  |
|  | DECISION MAKING |  |
|  | INNOVATION |  |
|  | PROJECT MANAGEMENT |  |
|  | FINANCE |  |
|  | QUALITY RESULTS |  |
|  | SELF DEVELOPMENT |  |
|  | CHANGE CAPACITY |  |
|  | EMOTIONAL MATURITY |  |
|  | FUNCTIONAL EXPERTISE |  |