

**PERFORMANCE MANAGEMENT  
OBJECTIVE SETTING WORKSHEET**

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date

From: \_\_\_\_\_ To: \_\_\_\_\_

<b>Objectives To Be Met and Means Used to accomplish same</b>	<b>Results Expected and Start/Time Frame</b>	<b>Met Objectives YES NO</b>	<b>Comments</b>

## INSTRUCTIONS FOR SETTING OBJECTIVES

Setting objectives is at the heart of the performance appraisal process for it gives meaning and relevance to the appraisal and development activities. This is done by:

1. encouraging managers, supervisors and employees to look ahead and consider the future;
2. getting the appraisal discussion away from general comments about personality characteristics;
3. focusing attention on the priorities of job activities;
4. providing a tool for expressing what the individual wants to achieve and what the municipality expects from the employee; and,
5. defining a strategy to assist in the accomplishment of the objectives stated.

The assessment of performance and the setting of objectives needs to be formalized so as to be available for future reference, review and discussion. This formalization is important and the structure provided by written objectives can prevent misunderstanding, disagreement, ambiguity and confusion.

### Definition of an Objective:

*An objective is a statement of the desired or needed **result** to be achieved by a specified **time**.*

Example: To research, assess and prepare **a report** on the feasibility, benefits and preliminary costs of purchasing x widgets from another source by **April 4, 1997**.

### Characteristics of an Objective:

1. **Specific:** oriented to a key functional or organization goal.
2. **Results-oriented:** achieving a specific product or condition.
3. **Measurable:** how will the appraiser know when the objective has been met?
4. **Brief:** one or two sentences only
5. **Challenging:** yet attainable.

### Setting Objectives:

1. The employee and supervisor individually think of key result areas where action is necessary.
2. The employee and supervisor develop a specific objective for each area using the following guidelines:
  - i) Begin with a verb.
  - ii) Identify a single result for each objective.
  - iii) State verifiable criteria which signal when the objective has been reached.
  - iv) Give the date of estimated completion.
3. The supervisor and employee discuss and agree upon the objectives then record them on this **Objective Setting Worksheet** form. Additional papers can be stapled to this form if more space is needed.
4. Objectives are to be set a minimum of every 12 months.

### Evaluating Objectives

1. After each 12 month period the supervisor evaluates the employee's performance and briefs his/her manager on the results the employee has achieved.
2. Following management review, the supervisor and employee meet to discuss the employee's performance and comment on the results achieved as they relate to the previously set objectives.
3. The employee and supervisor then set objectives for the next 12 month period and repeat the objective setting cycle.

# OVERALL EVALUATION

Unsatisfactory

Substandard but making progress.

Satisfactory

Above average

Excellent

## COMMENTS

<p>Areas of strength:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>and these can be used more effectively by doing the following:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>	<p>Areas for improvements:</p> <p>1. _____</p> <p>2. _____</p> <p>3. _____</p> <p>and these can be strengthened by doing the following:</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p> <p>_____</p>
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Rated by \_\_\_\_\_  
(Name) (Title)

(If not used as a self evaluation form, the employee should sign)

A copy of this Report has been given to me and has been discussed with me.

\_\_\_\_\_  
(Employee's Signature) (Date)

Employee wants additional personal comments attached  Yes  No

\_\_\_\_\_  
(Employee's Signature) (Date)