



Date of Conversation:	College/ Unit:
Employee Name and Title:	Department:
	Manager Name and Title:

**Both employee and manager or supervisor may use the same form to prepare for the goals and expectations meeting.**

Instructions:

1. Use this guide to engage in conversation about goals and expectations for coming year and record agreed upon goals and expectations.
2. Complete all sections; job knowledge, work quality, competencies, and attendance to document goals and expectations for the coming year.
3. Identify professional development opportunities for coming year.
4. This form should be considered as a working document to be amended throughout the year as needed.
5. File form in a confidential file separate from employee personnel files.

⇒ If form is being stored electronically, indicate file location \_\_\_\_\_



**Discussion Objectives:**

Use the employee’s job description, duties, and responsibilities as a guide for determining goals and expectations. Goals and expectations are the foundation for employee performance and should be referred to throughout the year while conducting development conversations, feedback conversations, and the annual review.

(Review employee job description) Are the responsibilities for this job position clear?

*Suggested questions:*

*Notes:*

**Explore employee goals and expectations for coming year-**

What are your performance goals and expectations this year?

How are your goals and expectations related to the team’s or department’s goals and expectations?

**Explore employee’s strengths and areas for development-**

What area(s) of your work do you find most challenging?

What area(s) of your work do you find the most gratifying?

What are your development goals for this year?

**Explore how you will define employee’s success-**

What do you use to determine success in your achievements?

How can the quality of your work best be measured/determined?

What benchmarks can be used to measure progress towards your goals?

What type of feedback will be most useful to support your success?



### JOB KNOWLEDGE

- Demonstrates knowledge and skills necessary to perform the job.
- Performs responsibilities in accordance with job description, procedures, and policies.
- Acts as a resource person (as necessary) upon whom others rely for assistance.
- Remains current in training and education regarding new developments and current practices in areas of responsibility.

**Discuss goals and expectations for coming year and record agreed upon goals and expectations:**

### WORK QUALITY

- Completes assignments in a thorough, accurate, and timely manner.
- Meets established goals and expectations successfully.
- Meets the expectations and needs of the department and others that depend on services or deliverables.
- Able to adapt and prioritize to complex and changing needs.

**Discuss goals and expectations for coming year and record agreed upon goals and expectations:**



### CORE COMPETENCIES

**For ALL EMPLOYEES** - Determine goals and expectations for coming year for competencies applicable to performance of job responsibilities.

Competency	Record agreed upon expectations:
<p><b>Accountability</b>- Accepts responsibility for actions and engages in appropriate behavior to address work-related issues. Meets departmental expectations for attendance and punctuality.</p>	
<p><b>Communication</b>- Sets the tone of the work environment by practicing good communication skills both written and verbal, including inclusive word choices and appropriate body language.</p>	
<p><b>Cooperation</b>- Effectively collaborates with others to enhance results in your work and colleague's work.</p>	
<p><b>Customer Service</b>- Manifests through timeliness, professionalism, and customer perceptions of how well their needs are met.</p>	
<p><b>Integrity</b>- Complies with the laws, rules, and policies to which UIC must adhere. Honesty and care permeates every action taken by all UIC employees.</p>	



### MANAGER COMPETENCIES

**For MANAGERS AND SUPERVISORS** - Determine goals and expectations for coming year for competencies applicable to performance of job responsibilities.

Competency	Record agreed upon expectations:
<p><b>Focus on Results</b> – Communicates vision, sets priorities, develops and executes plans to help employees and team achieve desired outcomes. Takes overall responsibility for outcomes while working with team members to take responsibility for their part.</p>	
<p><b>Developing Others</b> – Supports employee efforts to perform in their current role, achieve professional goals, and plan for career advancement. Provides well-timed feedback to praise or improve quality of work.</p>	
<p><b>Collaborative Conflict Resolution</b> – Encourages constructive open dialog between employees to resolve conflict, gathers information, listens to ideas proposed by others, and models the behaviors that foster collaborative working relationships among employees.</p>	
<p><b>Allocating Resources</b> – Supports unit operations by allocating staff and other resources efficiently to accomplish operational goals.</p>	
<p><b>Manages Budgets</b> – Demonstrates knowledge of good business practices and fiscal responsibility. Demonstrates proficiency in UIC budgeting policies where applicable.</p>	



### PROFESSIONAL DEVELOPMENT OPPORTUNITIES

**Create employee development plan and indicate professional development opportunities.**

NOTE: Leadership and Core Competency development opportunities may be found on the UIC Human Resources Professional Development webpage: [https://www.hr.uic.edu/professional\\_development](https://www.hr.uic.edu/professional_development)

Activity [e.g. course, certification, license, workshop, etc.]	Title/ Topic	Provider	Target Date(s)