

**Fiscal Year Goals – Quarterly Activities – Quarterly Conversations**

**FY Goals and Quarterly Activities**

Create goals to be completed over the next FY. Each goal should have quarterly activities to support successful completion of each goal area. Goals and Activities may include growth areas from position responsibilities and core competencies along with professional development opportunities. Employee and Supervisor create goals and activities in partnership after the annual evaluation is completed. This plan document can be altered as needed throughout the year. FY Goals and Quarterly Activities should be job related. Use S.M.A.R.T. Goal formatting (Specific, Measurable, Attainable, Relevant, Timebound).

**Quarterly Conversations**

Employee and Supervisor meet by the end of each quarter to discuss goal and activity progress. Quarterly Conversations are an opportunity to discuss not only the FY Goals and Quarterly Activities progress, but also a time to discuss performance feedback, employee needs, or other relevant items. Use the Quarterly Conversation pages to track progress throughout the FY.

**Tracking Tool**

Use the tracking tool below to track completion dates through the year.

|  |  |  |
| --- | --- | --- |
| Employee name |  | |
| Evaluating Supervisor |  | |
| Quarterly Check-Ins: | | **Conversation Date (include below)** |
| *Quarter 1 – Set FY Goals/Quarterly Activities*  *Quarter 2/3/4 – Goal and Activity Progress/Conversation* | **Quarter 1 (by October 15)** |  |
| **Quarter 2 (by January 15)** |  |
| **Quarter 3 (by April 15)** |  |
| **Quarter 4 (by July 15)** |  |

**FY Goals & Quarterly Activities**

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| **Goal #1**  Describe SMART Goal: | | |
|  | | |
| **Quarter 1 Activities (July – September)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 2 Activities (October – December)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 3 Activities (January – March)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 4 Activities (April – June)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
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| **Goal #2**  Describe SMART Goal: | | |
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| **Quarter 1 Activities (July – September)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 2 Activities (October – December)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 3 Activities (January – March)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 4 Activities (April – June)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
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| **Goal #3**  Describe SMART Goal: | | |
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| **Quarter 1 Activities (July – September)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 2 Activities (October – December)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 3 Activities (January – March)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |
| **Quarter 4 Activities (April – June)** | **How will you measure completion/success:** | **Anticipated Completion Date:** |
|  |  |  |

**Quarterly Conversations**

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| --- | --- | --- |
| **Goal #1 Progress** | | |
| **Quarterly Activities** | **Progress/Completion:** | **Follow-Up** |
| **Quarter 2:**  *Employee can type into the document to add progress on quarterly activities in the appropriate quarter.*  **Quarter 3:**  *Employee can add to the same document in the following quarters. Maintaining one progress document will assist in keeping track of annual progress.*  **Quarter 4:**  *Employee and Supervisor can maintain a shared document if desired so each party can keep relevant notes.* | *Employees can add in completion dates or milestones that have been accomplished.* | *Supervisors and employees can agree upon necessary follow-up deadlines. Due October 15.*  *By using the same document, supervisors can follow up during each quarterly conversation to ensure follow-up items are complete.* |

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| **Goal #2 Progress** | | |
| **Quarterly Activities** | **Progress/Completion:** | **Follow-Up** |
| **Quarter 2:**  **Quarter 3:**  **Quarter 4:** |  |  |

|  |  |  |
| --- | --- | --- |
| **Goal #3 Progress** | | |
| **Quarterly Activities** | **Progress/Completion:** | **Follow-Up** |
| **Quarter 2:**  **Quarter 3:**  **Quarter 4:** |  |  |

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| **Other Supervisor Feedback** |
| Quarter 1:  *Use this space to provide feedback during quarterly conversations that may be in addition to FY Goals and Quarterly Activites.*  Quarter 2:  Quarter 3:  Quarter 4: |
| **Items Employee needs from Supervisor (Supervisor Commitments for next Quarter)** |
| Quarter 1:  *Use this space to document items employee identifies as ‘needs from Supervisor.’ May include assistance with training, system access, specific work instructions/details, etc. Supervisor may provide commitment dates and document here.*  Quarter 2:  Quarter 3:  Quarter 4: |