

**QUARTERLY PERFORMANCE GOALS CHECK-IN**

Empl. Name:	Date of meeting:
Empl. ID #:	Date of annual review:
Department:	Job title:
Supervisor:	

**Check-In Period**     3 months     6 months     9 months | 12 months use [Annual Performance Evaluation](#)

*Before completing this form, review the instructions on page 4. For assistance with this review, consider using the [Individual Career Development Template](#). This Quarterly Performance Goals Check-In is not required, but is a resource for staff and supervisors to assist in creating a collaborative and productive work environment and to support the [Annual Performance Evaluation](#).*

**Employee Reflection**

This section provides questions to reflect on your work and progress toward your annual goals. Answers to these questions can be discussed in a check-in meeting.

**How have things been going since your last review?**

**How would you assess your overall performance?**

**What has been your biggest accomplishment since your last review?**

**What do you need to continue to be successful?**

### Evaluation of Employee Goal Progress

Staff members should take the lead on completing this section of the form. Annual goals are directed at an employee's position and daily responsibilities. This is an opportunity for staff to analyze progress, needs, and adjustments in their work. Supervisor comments are optional.

<b>Goal One:</b>	<b>Expected Completion Date:</b>
<b>Employee Assessment</b>	<b>Supervisor Assessment</b>
<b>Resources or Needs Moving Forward</b>	

<b>Goal Two:</b>	<b>Expected Completion Date:</b>
<b>Employee Assessment</b>	<b>Supervisor Assessment</b>
<b>Resources or Needs Moving Forward</b>	

<b>Goal Three:</b>	<b>Expected Completion Date:</b>
<b>Employee Assessment</b>	<b>Supervisor Assessment</b>
<b>Resources or Needs Moving Forward</b>	

### **Supervisor Notes**

*The Annual Review Process includes several categories of evaluation for the entire review period. It is important that an employee receives timely feedback on performance, the Annual Review should not be the first time significant comments are addressed. Supervisors should use this area to discuss accomplishments or areas of needed improvement. Refer to the [Annual Performance Evaluation](#) form to reference specific rating categories and descriptions. Additional comments can be attached, as necessary.*

### **Outcome Notes or Additional Comments**

*This space serves as additional spaces for any comments regarding meeting outcome, next steps, adjustments to goal details, etc.*

## Purpose

CWRU recognizes that our staff advance our mission through the critical roles they play within the university. The purpose of the Quarterly Performance Goals Check-In is to engage and develop our staff by setting them up for success during the time between Annual Performance Evaluation feedback.

The entire year provides an opportunity for productive two-way communication between the employee and the supervisor. The Quarterly Performance Goals Check-In aids in this discussion. It should help guide conversations between the supervisor and employee in reflecting on regular progress, outlining needs and adjustments, and addressing any questions or challenges the employee may experience regarding goal achievement. By maintaining a strong feedback and reflection culture, staff and their supervisors help lead the university toward our vision of being recognized internationally as an institution that imagines and influences the future.

## Instructions

1. The Quarterly Performance Goals Check-In form should be used in between Annual Performance Evaluations. It is encouraged that a staff member and their supervisor meet quarterly or biannually to discuss goal progress and needs for moving forward.
2. Staff members should take the lead with completing the Evaluation of Employee Goal Progress section of this form. Annual goals are directed at an employee's position and daily responsibilities. This is an opportunity for staff to analyze progress, needs, and adjustments in their work. Supervisor comments are optional. If a staff member has more than three annual goals please use the [Additional Annual Goals sheet](#) as necessary.
3. The supervisor and employee should meet and discuss the evaluation:
  - Begin with a discussion of employee reflection topics. A collaborative discussion over the last quarter or six months is encouraged.
  - Next, each goal should be analyzed separately. Discuss progress, needs for completing, or adjustments to the original goal. Goals can change and making these changes during quarterly reviews are beneficial for both staff member and supervisor.
  - The supervisor should then discuss any areas of note. This should include both positive and constructive topics. It is important to acknowledge both strong performance and areas of improvement in a timely manner.
  - Make plans for areas in need of improvement, as necessary. Plans are most successful when expectations are specific.
  - If more space is needed at any point in the document, please attach separate pages, as necessary.
4. After completing the Quarterly Performance Goals Check-In, a copy of the completed document should be retained by both the staff member and supervisor. This document can serve as a helpful reminder and should be referred to as necessary during the Annual Performance Review Process. A date for the next review should also be determined before meeting adjournment.

## Performance Concerns or Review Discrepancies

It is important for a staff member and supervisor to be on the same page regarding expectations for performance standards; including productivity, quality, and efficiency of work or personal behavior. Review office policy and [University Staff HR Policy](#) regularly. It is not reasonable to expect a staff member to adhere to standards of which they have not been made aware. Department handbooks and Staff HR Policy should be reviewed often. If there is a significant discrepancy between an employee's self-reflection and the supervisor's feedback in this Quarterly Performance Goals Check-In process, it should be addressed immediately. If assistance is required, contact [askhr@case.edu](mailto:askhr@case.edu).

While few staff members may fall into this category, if you find that a member of your team has fallen below performance standards of productivity, quality, efficiency, or behavior the issues should be addressed immediately. It is critical for feedback on this form to be representative of the quality of an employee's work, even if constructive feedback is required. For consistent performance concerns, corrective action may be required. For information on the Positive Corrective Action (PCA) policy, please visit the [Staff HR Policies](#) website.