Set SMART Goals

Use the SMART model when setting development goals/activities -- make sure they are: **Specific**; **Measurable**; **Action-Oriented**; **Realistic**; **Timebound**

---

**Career Development Action Plan - EXAMPLE**

Employee Name: **John Doe**  Date: **1/29/2018**  Supervisor Name: **Jane Doe**

**Self-Assessment Summary Statements**

**Career motivators in my current position:**
I want to be integral in providing efficient and top-notch services to our customers while maintaining strong, positive relationships. I would also like to be continually improving my own skills as well as all aspects of the services we provide.

**Skills and competencies to be developed:**
Customer service, problem-solving, consistently keeping within budget, time management, project management, process improvement, presentations and public speaking, organization.

**Vision of future career direction(s):**
I would like to build my management skills, have more freedom in designing services, and gain supervisory responsibilities. I envision moving to an Analyst IV or Coordinator position within my unit.

---

**Career Goals**

**Short-Term (1 year):**
Maintain and improve customer service skills and ratings, develop better time and project management skills, and become better at documenting throughout the project timeline (from start to follow-up).

**Medium-Term (2-5 years):**
Become a great presenter and project coordinator. Gain some supervisor/manager experience.

**Long-Term (5+ years):**
Managing a unit and in charge of creating new services. Being a liaison for customer feedback and response.
### Development Activities and Experiences

<table>
<thead>
<tr>
<th>Activity</th>
<th>Action Steps</th>
<th>Milestones/Success Measures</th>
<th>Estimated Cost(s)</th>
<th>Target Completion Date(s)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Example: Advanced Excel course</td>
<td>Register through UC Learning Center</td>
<td>Course completion</td>
<td>$AB</td>
<td>2/29/18</td>
</tr>
<tr>
<td>Project management skills training</td>
<td>Register for PMI Course</td>
<td>Obtain PMP certificate; report on how to apply new skills and concepts to my current projects</td>
<td>$XYZ</td>
<td>5/15/18</td>
</tr>
<tr>
<td>LEAN Process Improvement workshop</td>
<td>Register through UC Learning Center</td>
<td>Completion of all workshop classes and project, obtain White Belt</td>
<td>$ABC</td>
<td>3/1/2018</td>
</tr>
<tr>
<td>Get a mentor through AMP (formerly ABOG)</td>
<td>Apply to AMP mentorship program</td>
<td>Completion of program: fulfill all program obligations and meetings</td>
<td></td>
<td>12/31/18</td>
</tr>
<tr>
<td>Leading the Frontline course</td>
<td>Apply to program via UC Learning and Organization Development</td>
<td>Completion of program: attend all classes, go through coaching, assessments, and assignments</td>
<td>$XYZ</td>
<td>10/31/18</td>
</tr>
<tr>
<td>PRINT NAME</td>
<td>SIGN NAME</td>
<td>DATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>------------</td>
<td>-----------</td>
<td>------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Employee:</td>
<td>John Doe</td>
<td>1/29/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Direct Manager/Supervisor:</td>
<td>Jane Doe</td>
<td>1/29/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Director:</td>
<td>Jen Doe</td>
<td>1/29/2018</td>
<td></td>
<td></td>
</tr>
<tr>
<td>*AVC:</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Direct Manager/AD/ Service Manager/OD AD/AVC: Your signature indicates approval for time off of work on dates provided and for the expenses indicated.

*AVC Signature required for out-of-state travel.
### Notes or Follow-up on Previous Questions (if needed)

I am also interested in learning more about sustainability, responsible energy use, and building improvement, in order to design better, future-forward programs for our customers. This would create services that are high in demand, with the added benefit of saving UCSF money. I would also need to explore more technical fields (HVAC, waste management protocols, technical understanding of high-performance buildings’ best practices, etc.)

### Employee / Manager Follow-up Meetings

Scheduled for:
- 4/1/18
- 7/1/18
- 10/1/18

### Reflections