



Manager, Ph.D. Quarterly Goal-Setting & Review Template

Current Career Development Goals

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Review of [last quarter dates], and goals for [next quarter dates]

Quarter in Review - to [end of last quarter]

Questions for discussion (no need for written answers):

1. What are you most proud of in the last quarter?
2. What did you learn?
3. Where did you struggle?
4. What are you anxious about in the coming quarter?
5. What are you excited about in the coming quarter?

Work Outcomes & Skills

What outcomes (delivered work that others can build on) were your goals for the past quarter?

What outcomes (delivered work that others can build on) did you achieve over the past quarter?

Example's Starting Notes:

Jonathan's Starting Notes:

Agreed on together:

What steps did you take to move towards your career development goals over the past quarter?	
Proposed steps last quarter:	
Example's Answer:	
What key strengths and skills have you demonstrated and developed this year as they pertain to your work?	
Proposed steps last quarter:	
Example's Starting Notes:	Jonathan's Starting Notes:
Agreed on together:	
What challenges did you face during the past quarter?	
Example's Answer:	

Objectives for next quarter - to [end of next quarter]

Set tasks, objectives, and goals- specific enough to be something a third party could check, and with a deadline - for your work in the upcoming quarter; what will you be doing and what resources/support do you need to accomplish this work?	
Example's Starting Notes:	Jonathan's Starting Notes:
Agreed on Together:	
State tasks, objectives, and goals for the upcoming year - specific enough to be something a third party could check, and with a deadline - as they pertain to your career development	

plans.	
Example's Starting Notes:	Jonathan's Starting Notes:
Agreed on Together:	
What will you do this quarter to develop skills that will enhance your capabilities/productivity to help with achieving your goals? What resources/support do you need to accomplish this?	
Example's Starting Notes:	Jonathan's Starting Notes:
Agreed on Together:	