



RP3 Application

Question III.B.1 Goal Setting Process Example

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Guidelines:

III.B.1 Goal Setting Process Question is asking for individual goals that are **actionable**, **measurable**, and encourage growth through various personal and professional development opportunities. For full points, you must provide samples of goals for each of the three employee categories (you may black out the employee's name for privacy). Please note that a generic apprentice program is not considered part of the goal-setting process. Utilities often provide a sample appraisal or review form with a list of goals and how they achieved those goals or the status of those goals.



Sample Supporting Material:

I. Management Employees Example

[Utility Name and/or Logo here]

Annual Employee Recap Form

Sample goal information pulled from annual reviews given between [Review Strat Date] and [Review End Date]. Reviews were for [XXXX] calendar year.

Employee name: _____

Title: _____ **Utilities Operations Manager** _____

Date: _____

Accomplishments completed during past year (i.e projects completed, additional schooling completed, etc):

Overall list of specific examples where employee demonstrated or showed above average performance in Areas of Focus:

Overall list of specific examples where employee demonstrated or showed below average performance in Areas of Focus:

List areas the employee experienced growth during the past year:

List annual goals for the next 12 months (1 up to 4 that are measurable):

- **Develop tools or resources that review larger budget items to support budget process**
- **Complete long term planning study for distribution system including substations**
- **Onboard new system engineer**
- **Develop a process to evaluate and track budget metrics to identify shortfalls and efficiencies in the budget execution**



Recap on status of previous years' goals:

- Supported purchase order software implementation
- Embraced staff in new roles and ensured work duties were adjusted accordingly (work loads seem balanced and individuals new to this team are fully integrated)
- Implemented OMS system (OMS program operational internally and ready to share with customers)
- Worked with HR on successfully implementing a formalized training program to ensure employees are qualified and proficient to conduct their jobs.

Signatures:

Employee: _____ Date: _____

Supervisor (if applicable): _____ Date: _____

Department Manager: _____ Date: _____

General Manager: _____ Date: _____



II. Operations/Field Employee Example

[Utility Name and/or Logo here]

Annual Employee Recap Form

Sample information pulled from annual reviews given between [Review Strat Date] and [Review End Date]. Reviews were for [XXXX] calendar year.

Employee name: _____

Title: Electric Utilities Engineer II

Date: _____

Accomplishments completed during past year (i.e projects completed, additional schooling completed, etc):

Overall list of specific examples where employee demonstrated or showed above average performance in Areas of Focus:

Overall list of specific examples where employee demonstrated or showed below average performance in Areas of Focus:

List areas the employee experienced growth during the past year:

List annual goals for the next 12 months (1 up to 4 that are measurable):

- Construct an overhead 2 to 3 span line to be used during training exercises
- Utilize new acquired technologies to better track progress and materials on job orders

Recap on status of previous years' goals:

- Completed utility leadership courses



- Learned data integration for the OMS/GIS system
- Lead customer relations, easements, and service work upgrades for conversion projects

Signatures:

Employee: _____ Date: _____

Supervisor (if applicable): _____ Date: _____

Department Manager: _____ Date: _____

General Manager: _____ Date: _____

III. Office Personnel Employees Example



[Utility Name and/or Logo here]

Annual Employee Recap Form

Sample information pulled from annual reviews given between [Review Strat Date] and [Review End Date]. Reviews were for [XXXX] calendar year.

Employee name: _____

Title: _____ Senior Administrative Assistant

Department: _____ Electric Transmission and Distribution

Date: _____

Accomplishments completed during past year (i.e projects completed, additional schooling completed, etc):

Overall list of specific examples where employee demonstrated or showed above average performance in Areas of Focus:

Overall list of specific examples where employee demonstrated or showed below average performance in Areas of Focus:

List areas the employee experienced growth during the past year:

List annual goals for the next 12 months (1 up to 4 that are measurable):

- Be part of engineering integration team including developing SOPs for engineering analysis tools
- Attend 2 technical training sessions during year
- Develop a compliance dashboard for trainers

Recap on status of previous years' goals:

- Completed leadership series [add specific course name] and the principles of substation design course



- Volunteered for water table cleaning event
- Prepared for cyber security incident response training

Signatures:

Employee: _____ Date: _____

Supervisor (if applicable): _____ Date: _____

Department Manager: _____ Date: _____

General Manager: _____ Date: _____