



OAKTREE

## INDIVIDUAL PERFORMANCE GOALS

STAFF MEMBER NAME: \_\_\_\_\_

MANAGER(S): \_\_\_\_\_

TITLE: \_\_\_\_\_

DEPARTMENT: \_\_\_\_\_

EVALUATION YEAR /  
PERIOD: \_\_\_\_\_

SUB-DEPARTMENT: \_\_\_\_\_

### INSTRUCTIONS:

- DISCUSS WITH YOUR MANAGER AND DOCUMENT THE AGREED UPON GOALS
- CREATE UP TO SIX (6) GOALS IN TOTAL
- ENSURE GOALS ARE SMART (SPECIFIC, MEASURABLE, ACHIEVABLE, RESULTS-ORIENTED, AND TIME-BASED)
- SUBMIT TO STEPHANI SCHMIDT IN HR AT [sschmidt@oaktreecapital.com](mailto:sschmidt@oaktreecapital.com)

PERFORMANCE GOALS		
GOAL	GOAL CATEGORY: STRATEGIC, FINANCIAL, OPERATIONAL, PEOPLE	BY WHEN OR HOW OFTEN?
1.		
2.		
3.		
4.		
5.		
6.		

STAFF MEMBER APPROVAL

\_\_\_\_\_  
(TYPE INITIALS)

\_\_\_\_\_  
DATE

MANAGER APPROVAL

\_\_\_\_\_  
(TYPE INITIALS)

\_\_\_\_\_  
DATE