



Worksheet: Building Effective KPIs & Assessment Plans

Objective	KPI Short Name:	KPI Short Name:
Define your Goals What is the primary goal or outcome you aim to achieve? Ex: Improve student attendance at events		
Identify Success Indicators What would success look like? List 2-3 specific outcomes. Ex. Increased attendance, higher satisfaction scores, etc.		
Translate Goals into KPIs Use the SMART criteria to develop a KPI related to your goal. <ul style="list-style-type: none">• Specific: What exactly are you measuring?• Measurable: How will you quantify success?• Achievable: Is this realistic given your resources?• Relevant: Does this align with departmental or institutional goals?• Time-bound: What is your timeframe for achieving this?		



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Choose Your Assessment Methods What tools or methods will you use to collect data for each KPI? Example: Surveys, event check-ins, focus groups, or observations.		
Outline Resources & Responsibilities Who will oversee the process, and what resources will they need? Ex: Team member [A] in charge of distributing surveys; Team member [B] in charge of analyzing data results; Manager [C] in charge of implementing changes		
Set a Timeline What is your timeline for each phase of the assessment? <ul style="list-style-type: none">• Data collection start date:• Data collection end date:• Result Analysis by:• Implement change starting:		
Reflect and Iterate <ul style="list-style-type: none">• What challenges or barriers might you face, and how can you address them?• What out departments/units would benefit from this data or analysis?		