**Performance Review Template**

The performance review process is a tool not only for evaluation, but also for aligning on expectations, recognizing achievements, and ensuring every team member receives the support they need to thrive. The goal is to establish a consistent and transparent structure that fosters growth, reinforces our shared values, and helps both supervisors and staff stay aligned with individual and team goals.

**Roles and Responsibilities**

Direct reports and their supervisors play active roles in this process.

**Direct reports** are encouraged to take ownership of their development by:

* Engaging honestly in self-assessment and
* Identifying their development needs.

**Supervisors** are responsible for:

* Offeringclear feedback and evaluation
* Helping direct reports set development goals, and
* Finalizing the review.

Supervisors help staff make progress on their development goals by providing opportunities for staff to gain experience through on-the-job learning,ongoing coaching and mentoring, and external trainings when relevant.

Learn more about the formal review process by reading the article “[From Perfunctory to Purposeful: Designing a Constructive Nonprofit Performance Review Process](https://www.bridgespan.org/insights/nonprofit-leadership/from-perfunctory-to-purposeful-designing-a-constructive-nonprofit-performance-review-process).”

Consult our [competency bank](https://www.bridgespan.org/getmedia/d5d356d6-85be-4319-b9e9-0c5fa8876130/competency-bank.pdf) for a list of competencies commonly used by nonprofits.

While supervisors are responsible for sharing and discussing formal reviews with direct reports, they are also responsible for engaging in regular progress discussions throughout the year. These provide supervisors and direct reports opportunities to reflect on successes and progress and make adjustments as needed. While formal submission of these discussions is not required, it is helpful to reference the review framework to help track progress and recalibrate goals if needed.

*These templates were created by* [*Aprium Advisors*](https://www.apriumadvisors.com/) *and The Bridgespan Group.*

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| **Self-Assessment** **Template -** *developed by direct report and shared with supervisor before formal review is completed* | | |
| [Reviewee name] | [Supervisor name] | [Time frame] |
| **Self-Assessment by Responsibility**  *The categories below should be the same as those in the formal performance review* | | |
| **Insert major category of job responsibilities** (i.e., program delivery)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area*(successes and competency strengths demonstrated)*: | | |
| Development areas(*challenges, gaps in expectations, and competency growth areas)*: | | |
| **Insert major category of job responsibilities** (i.e., client support and engagement)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |
| **Insert major category of job responsibilities** (i.e., staff supervision)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |
| **Insert major category of job responsibilities** (i.e., operations and administration)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |
| **Upward Feedback for Supervisor** | | |
| What has your supervisor done well or effectively to support you? | | |
| What could your supervisor start or stop doing that would better support you? | | |

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| **Performance Review Template -** *completed by supervisor* | | |
| [Reviewee name and role] | [Supervisor name] | [Time frame] |
| **Summary Message:** *(Be succinct)*   * Highlight key strengths and accomplishments * Name growth areas and any challenges *(distinguish between gaps in expectations and next steps in development)* | | |
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| **Performance Assessment by Responsibility**  *The categories below should be the same as those in the self-assessment* | | |
| **Insert major category of job responsibilities** (i.e., program delivery)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area*(successes and competency strengths demonstrated)*: | | |
| Development areas(*challenges, gaps in expectations, and competency growth areas)*: | | |
| **Insert major category of job responsibilities** (i.e., client support and engagement)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |
| **Insert major category of job responsibilities** (i.e., staff supervision)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |
| **Insert major category of job responsibilities** (i.e., operations and administration)   * Include as many detailed bullets outlining job responsibilities as needed for clarity of expectations | | |
| Strengths in this area: | | |
| Development areas: | | |

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| **Performance Goals for Going Forward** - ***c****ompleted collaboratively after the formal review* | | |
| **Job Targets**  List the 2-3 most critical milestones, accomplishments, key priorities, or goals the employee is accountable for in their role in the next period; these should clarify or accompany the ongoing responsibilities in their job description | | |
| **Job-Related Goal**  Consider the performance goal to achieve over the next period  *Example: Launch and evaluate the new after-school tutoring program at two sites by Dec* | **Expected Result**  Then identify the indicators of progress or success on that goal  *Example: At least 80% student attendance at each site* | **Supporting Actions**  Detail the realistic plan or specific actions to achieve that goal  *Example: Recruit and hire program director; execute enrollment plan and identify founder families; confirm lease details with landlord* |
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| **Competency Growth Areas**  List the 2-3 most critical competencies the employee should focus on that are either critical to improving current job performance or for developing the skills and experience for future job growth | | |
| **Competency**  Use [this competency bank](https://drive.google.com/file/d/1_7QX1LmobsWViRarIRyEsh_puZBlyp3h/view) to identify competencies to focus on  *Example: Workload management* | **Development goal**  Then find the [detailed definition of identified competences in the bank](https://drive.google.com/file/d/1_7QX1LmobsWViRarIRyEsh_puZBlyp3h/view) and pick 1-2 skills or behaviors to focus on  *Example: Continue to develop skills at breaking down larger projects into steps; develop plans for team or cross-team projects, and coordinate efforts to implement* | **Supporting Actions**  Detail actions or experiences the employee can take to practice and develop those specific competencies over the coming months.  For more on how to develop competencies, see [Bridgespan’s resources on talent development](https://www.bridgespan.org/insights/nonprofit-leadership/how-nonprofit-leadership-development-sustains-organizations-and-their-teams)  *Example: Develop a detailed timeline and use a task tracker to manage team workflows for the site launches; hold monthly check-ins to assess progress* |
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