# Annual staff performance review template

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| **Organisation** |  |
| **Staff member** |  |
| **Role** |  |
| **Line manager** |  |
| **Date of review** |  |

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| **Organisation’s vision:** |

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| **Organisation’s key strategic priorities [listed as headings, no detail]**1.2.3.4.5.etc |

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| **Key performance indications: what did you aim to achieve last year?** |
| **Strategic priority category or ‘business as usual’** | **Area of work (e.g. membership growth, programs, publications)** | **What did you aim to achieve?****(Use specific numbers if you can; or nominate establishment of something new; or if it’s a business as usual item, describe it specifically.)** | **What did you achieve?** |
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| **How did you help create a positive culture in your organisation?** |

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| **What would you like to focus on for your professional development this coming year?** |
| **What area would you like to develop?****(This could be a skill or knowledge.)** | **How will it help you contribute to the organisation?** | **What professional development activity would you like to do?** **(This can be paid training or free activities such as reading, mentoring, visiting other organisations or free online courses.)** |
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Employee signature: DATE:

Line manager signature: DATE:

**INSTRUCTIONS FOR USING THE REVIEW TEMPLATE**

1. At the beginning of your year (calendar year, financial year or other) each staff member should consider what they would like to do in the coming year, and how these aims fit in with your organisation’s strategic aims. These should be listed on a document and agreed with the line manager.

These aims should fit into the following format.

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| **Name the strategic priority category or ‘business as usual’** | **Name the area of work (e.g. membership growth, programs, publications)** |
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1. At the end of each 12-month cycle, each staff member should complete this review document (it becomes a self-review).
2. Similarly, line managers should use this document to review the work of those who report to them, and consider their success.
3. The two should hold a meeting and exchange their notes.
4. A very important part of the review process is the professional development reflection at the end, which both encourages a growth mindset and also demonstrates an organisation’s commitment to its people’s growth and future satisfaction.