

# Performance Review Template

## Introduction

The *Performance Review* documents the ongoing conversation between the manager and employee throughout the year. It captures role expectations, competencies, business, and development goals including action plans, and progress updates. Use this tool during each check-in meeting to capture accomplishments, feedback, and coaching comments. This template will be completed by the employee and reviewed by the manager.

To use this tool, simply fill in the blanks with the appropriate information.

Steps:

1. The manager sets expectations with the employee.
2. Review competencies and expected proficiency levels.
3. Based on career conversations and the employee's role, develop performance goals and development goals. Use the goal setting model – they do not need to be overly complex and should focus on the employee's role, practice objectives, and employee development.



4. Build a concrete action plan by identifying development methods to fill any gaps and achieve career objectives. An action should be identified for each development goal.
5. Identify the manager support required to achieve goals and fulfill the action plan.
6. Update progress during check-in meetings.
7. Employee completes a self-assessment for expectations, competencies, and goals.
8. The manager assesses each of the above categories during each check-in and a final rating is given during the annual review (if applicable).

## Section 1 – Performance Review

Employee Name: \_\_\_\_\_

Title: \_\_\_\_\_

Manager: \_\_\_\_\_

Role Expectations and Competencies							
Role Expectations					Employee Assessment	Manager Assessment	Date
<ul style="list-style-type: none"> <li>Complete X number of assessments per week, focus on client access</li> <li>Deliver full cycle of care to clients leading to positive client outcomes</li> <li>Maintains schedule with 90% occupancy</li> <li>Deliver great client experience leading to family and friends referrals and positive Google reviews</li> <li>Complete all client documentation and reporting timely and to college standards</li> </ul>					Delivers	Exceeds	MM/DD/YY
Competencies					Employee Assessment	Manager Assessment	Date
<ul style="list-style-type: none"> <li>Communication</li> <li>Inter-personal Relationships</li> <li>Customer Focus</li> <li>Teamwork and Collaboration</li> <li>Relationship Building</li> <li>Problem Solving and Decision Making</li> </ul>							
Performance Goals & Action Plans							
Business Goal	Timeline for Completion	Measurement of Achievement	Steps to Achieve	Coaching Comments	Employee Assessment	Manager Assessment	Date
To improve my patient's full cycle of care by moving my average patient visits from 4 to 7, achieving better outcomes.	MM/DD/YY	Clinician dashboard measurement of average visits and client outcomes data	<ul style="list-style-type: none"> <li>Complete care plans for each new assessment.</li> <li>Review care plan with the client through their stages of healing.</li> </ul>				

			<ul style="list-style-type: none"> <li>• Schedule out client's treatment plan</li> <li>• Work with admin team to make sure my cancels are rescheduled</li> </ul>				
[Insert goal]	[Date]	[Measure]	[Describe method]				
<b>Development and Growth Goals &amp; Action Plans</b>							
<b>Development and Growth Goal</b>	<b>Timeline for Completion</b>	<b>Measurement of Achievement</b>	<b>Development Method</b>	<b>Coaching Comments</b>			
Further, develop clinical skills through attendance to manual therapy courses	MM/DD/YY	Completion of Manual Therapy Level 1 and Level 2	Attending courses and work with clinicians in the application of skills learned.				
<b>Employee Self-Assessment Comments</b>							<b>Date</b>
<b>Manager Assessment Comments</b>							<b>Date</b>

## Rating Scale

<b>Exceptional</b>	Your performance is consistently superior to the expectations and standards required for the position. Your job performance results in extraordinary and exceptional accomplishments with significant contributions to the goals of the department and organization.
<b>Exceeds</b>	You routinely exceed expectations; there are no areas in which you are not entirely proficient. Your job performance is significantly better than that of your peers. The high quality of your work, both in the results achieved and how you achieve them, is an example to your colleagues.
<b>Delivers</b>	You are consistently delivering on expectations and are fully capable in all aspects of your role. There may be some areas in which your job performance exceeds the role's performance expectations. Both the results you achieve and the way in which you go about performing your job are good examples to others.
<b>Developing</b>	You are delivering on some expectations of the job, but not all. There are some performance gaps that have been identified and require improvement.
<b>Did Not Deliver</b>	Your performance does not meet the minimum expectations for this job and is not acceptable. There are performance gaps that have been identified and require immediate action.

## Section 2 – Aspiration Discussion Guide

Use the section below to record career aspiration discussion notes. Discuss career aspirations periodically as you discuss goals, using the guiding questions below. Career aspirations will inform future discussions on talent management and employee potential.

- Do they feel ready to take on new roles/types of work or do they still enjoy gaining mastery in their current role?
- What do they think their next role will be?
- Do they have a desire to move laterally in the organization?
- Are they interested in a leadership role or do they aspire to be a future expert?
- If they have been identified as part of a succession plan, are they interested in the target role?

Career Aspiration Discussion Notes	Target Position in 3-5 Years	Next Possible Positions	Discussion Date
Aspires to a leadership role, currently very mobile. Would like to use educational background in computer science.	Global IT Leader	<ul style="list-style-type: none"> <li>• Larger Country IT Leader</li> <li>• IT Project Leader</li> </ul>	MM/YY
[Insert notes]	[Insert target position]	[Insert possible ramp-up positions]	[Insert notes]