



PERFORMANCE REVIEW WORKSHEET

ABOUT THIS WORKSHEET

This worksheet is designed to be done at year-end, to reflect on your year in review. But really, this type of assessment can be done at any time of the year, for any space of time “in review,” or whenever your employer requests an annual review. It’s particularly useful at a significant milestone, like a job change or project completion. It’s also useful when you feel a lull and want to get clear on what’s next.

Also note – this review process is important whether or not your employer requests it, and even if they don’t have a formal review process. It’s for YOU, not just for your employer.

Finally, this worksheet is not meant to be shared with your employer directly. It’s a self-assessment process and it’s intended that you transfer the appropriate information to whatever form is provided by your organization.

WHAT DID YOU ACCOMPLISH THIS YEAR?

Consider projects, improvements, clients served...be as specific as you can.

WHAT DIDN'T GO SO WELL THIS YEAR?

Give yourself space to list your frustrations, disappointments, and resentments. (Be sure to add them to your forgiveness list too!)

WHAT COULD I HAVE DONE TO MAKE THIS *EVEN BETTER*?

This is a particularly powerful question – and you can ask it of both your positive accomplishments and the aspects of your year that didn't go so well. This is not about creating self-blame and self-criticism or allowing you to beat yourself up over anything that happened.

WHAT DID YOU *LEARN* THIS YEAR?

Consider skills, trainings, insights, and awareness.

WHAT DID YOU *RECEIVE* THIS YEAR?

Consider your salary, benefits, funding for training, title changes, respect, and positive changes to your office setting. Then go bigger: consider feedback, growth opportunities, and support. Who might you want to thank?

WRITE A NARRATIVE

This is optional, but I find it extremely helpful to write a narrative of my year, and write it like a story. Start with waking up on New Year's Day, thinking about what your hopes and dreams for were the year. Move onto your first week at work, and jump through the key milestones that you outlined above. Weave the themes together until you see a deeper layer of meaning in your year.

LOOKING FORWARD

Year-end performance reviews are rarely just about looking back. They are an ideal time to set the stage for moving forward. Go in prepared with some ideas of what you would like to experience in the coming review period.

WHAT DO YOU WANT TO *ACCOMPLISH* THIS YEAR?

List any specific types of projects, responsibilities, or practice improvements. Also look for opportunities in what's strategically important to your organization.

WHAT DO YOU WANT TO *CONTRIBUTE* THIS YEAR?

What impact do you want to make on your organization, your organization's clients, and/or the people around you?

WHAT DO YOU WANT TO *RECEIVE* THIS YEAR?

Consider salary adjustments, title changes, work setting upgrades, funding for training, etc. Refer back to the Career Inventory Worksheet with the Goals That Guide You teaching for additional ideas.

WHAT *SUPPORT* DO YOU NEED TO BE SUCCESSFUL?

This might be the most important question on this worksheet! All too often, we set a goal and think we need to go it alone. And then we get stuck, not due to lack of ability, but lack of support. What support do you need, in terms of time, resources, budget, management buy-in, stakeholder availability, etc.?

WHAT ARE YOUR *NON-NEGOTIABLES*?

Non-negotiables are boundaries you put in place that enable you to do your best work. They may be time off, not checking email after 5 PM (or 8 PM!), work-at-home days, commute requirements, travel requirements, etc.

Unlike the above 2 questions, these are truly set in stone – meaning you don't compromise (unless you decide to change your mind about what's non-negotiable to you). They are like "drawing a line in the sand."

The trick about non-negotiables is the clearer you can get about what you *don't* want (and trust yourself to maintain those boundaries), the easier it can be to see opportunities to achieve what you *do* want in ways that serve you.

WHAT ARE YOUR *SEMI-NON-NEGOTIABLES*?

What would you love to put on the above list, but just don't feel ready to yet? List them here so you can begin to pull forward their realization.

PLAN OUT YOUR YEAR

Identify key milestones for the year that will help you accomplish what you want to accomplish. The goal here is not to get this perfect; it's to get you moving! We often underestimate what we can do in a month and overestimate what we can do in a year. In fact, 6 months is a good chunk of time to plan – so feel free to be more specific about the next 6 months and less specific about later in the year.

Month	Key Milestones
January	
February	
March	
April	
May	
June	
July	
August	
September	
October	
November	
December	

WRITE A NARRATIVE

Again, this is optional but it can be extremely insightful to write a story for your year. Again, start with waking up on New Year's Day, thinking about what your hopes and dreams for are for the coming year. Move into your first week at work, and jump through the key milestones. Envision what comes up that might take you off course. See yourself getting back on track. Envision this time next year, celebrating the end of the year, and looking back on what you've accomplished, received, and contributed, all within the boundaries you set. How does that feel?

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