

# ANNUAL JOB REVIEW TOOL

PREPARED BY  
**nonprofit**help

NAME: \_\_\_\_\_

POSITION TITLE: \_\_\_\_\_

SIGNIFICANT TASKS	% OF TIME ON EACH TASK	PRIORITY LEVEL OF EACH TASK	JOY LEVEL OF EACH TASK	SKILL LEVEL OF EACH TASK
<p><b>Please list all core tasks that make up your job.</b></p> <p>To make this most helpful, keep this list of tasks general, don't include all the various parts of each task.</p> <p>This will take awhile to determine. I think you keep this next to your desk for several months to make sure you capture all core tasks.</p>	<p><b>This is the trickiest part of this document.</b></p> <p>Try and approximate what % of your time you spend on each task.</p> <p>You can do this per week, or per month, or another better time period based on your job.</p>	<p><b>In this column put a "1" next to what you, as a staff member, believe is the real #1 priority task.</b></p> <p>Then a "2" next to what you see as the #2 priority and keep numbering until every task has a priority number.</p>	<p><b>Please rate how much you enjoy each of the tasks of this job.</b> Some of the tasks may have various parts with varying degrees of enjoyment. Please just give one overall score per task.</p> <p><b>5</b> = I love doing this task <b>4</b> = I like doing this task <b>3</b> = It depends ... <b>2</b> = I don't like this task <b>1</b> = I really dislike this task</p>	<p><b>In order to accomplish each task at a high level please rate your personal skill level for each of the tasks you listed.</b></p> <p><b>5</b> = I never need assistance &amp; others who are less qualified should do this <b>4</b> = I never need assistance <b>3</b> = I need assistance less than 20% of the time <b>2</b> = I need assistance 20 to 50% of the time <b>1</b> = I need assistance more than half of the time</p>



We suggest you do this as an EXCEL spreadsheet with these 5 columns. Each staff member completes this on their own once each year for the person/s they report to. Leadership can then use this to align tasks, time and priority levels. Low skill or joy levels might necessitate training or other changes.



**DAVID HARTLEY**

**EMAIL** david@nonprofithelp.ca

**WEB** nonprofithelp.ca