

## Performance Review Template

### Employee Information

Employee Name: [Name]

Position: [Job Title]

Department: [Department]

Review Period: [Start Date] to [End Date]

Review Date: [Date]

Reviewer: [Manager Name]

Review Type: [Annual/Semi-Annual/Quarterly/Other]

### Performance Summary

#### Overall Performance Rating

- Exceeds Expectations (5)
- Meets Expectations (4)
- Partially Meets Expectations (3)
- Below Expectations (2)
- Unsatisfactory (1)

#### Key Accomplishments This Period

- 1.[Major accomplishment #1]
- 2.[Major accomplishment #2]
- 3.[Major accomplishment #3]

#### Areas of Excellence

- [Strength #1 with specific examples]
- [Strength #2 with specific examples]
- [Strength #3 with specific examples]



## Goal Achievement Review

Goal 1: [Goal Title]

Original Target: [Specific target/metric]

Actual Result: [What was achieved]

Status: [Exceeded/Met/Partially Met/Not Met]

Notes: [Context and explanation]

Goal 2: [Goal Title]

Original Target: [Specific target/metric]

Actual Result: [What was achieved]

Status: [Exceeded/Met/Partially Met/Not Met]

Notes: [Context and explanation]

Goal 3: [Goal Title]

Original Target: [Specific target/metric]

Actual Result: [What was achieved]

Status: [Exceeded/Met/Partially Met/Not Met]

Notes: [Context and explanation]



## Performance Competencies

### Job-Specific Skills

Rating: [1-5 scale]

- Technical knowledge and expertise
- Quality of work output
- Productivity and efficiency
- Innovation and problem-solving

Comments:

### Communication Skills

Rating: [1-5 scale]

- Verbal communication effectiveness
- Written communication clarity
- Active listening skills
- Presentation abilities

Comments:

### Collaboration & Teamwork

Rating: [1-5 scale]

- Works effectively with others
- Contributes to team goals
- Supports colleagues
- Resolves conflicts constructively

Comments:

## Leadership (if applicable)

Rating: [1-5 scale]

- Motivates and inspires others
- Provides clear direction
- Develops team members
- Makes effective decisions

Comments:

### Adaptability & Learning

Rating: [1-5 scale]

- Embraces change and new challenges
- Learns from feedback
- Seeks growth opportunities
- Demonstrates resilience

Comments:

### Reliability & Accountability

Rating: [1-5 scale]

- Meets deadlines consistently
- Takes ownership of work
- Follows through on commitments
- Maintains quality standards

Comments:



## Core Values Alignment

[Company Value #1]: [Value Name]

Rating: [1-5 scale]

Examples: [Specific behaviors demonstrating this value]

[Company Value #2]: [Value Name]

Rating: [1-5 scale]

Examples: [Specific behaviors demonstrating this value]

[Company Value #3]: [Value Name]

Rating: [1-5 scale]

Examples: [Specific behaviors demonstrating this value]

[Company Value #4]: [Value Name]

Rating: [1-5 scale]

Examples: [Specific behaviors demonstrating this value]

## Development Areas

### Areas for Improvement

- [Development Area #1]Current state: [Where they are now]
- Target state: [Where they need to be]
- Development action: [Specific steps to improve]
- [Development Area #2]Current state: [Where they are now]
- Target state: [Where they need to be]
- Development action: [Specific steps to improve]
- [Development Area #3]Current state: [Where they are now]
- Target state: [Where they need to be]
- Development action: [Specific steps to improve]

### Development Resources

- Training programs
- Mentoring opportunities
- Stretch assignments
- Conference/workshop attendance
- Online learning platforms
- Cross-functional projects

## Goal Setting for Next Period

Goal 1: [Goal Title]

Objective: [Clear, specific goal]

Success Metrics: [How success will be measured]

Target Date: [Completion deadline]

Resources Needed: [Support, training, tools required]

Goal 2: [Goal Title]

Objective: [Clear, specific goal]

Success Metrics: [How success will be measured]

Target Date: [Completion deadline]

Resources Needed: [Support, training, tools required]

Goal 3: [Goal Title]

Objective: [Clear, specific goal]

Success Metrics: [How success will be measured]

Target Date: [Completion deadline]

Resources Needed: [Support, training, tools required]

## Career Development Discussion

### Current Career Interests

- Advancement in current role
- Lateral movement to new function
- Leadership development
- Specialized skill development
- Long-term career planning

### Career Goals (1-2 years)

Employee's stated goals:

Manager's assessment:

Agreed-upon development plan:

### Skills Development Priorities

- 1.[Skill #1] - [Development approach]
- 2.[Skill #2] - [Development approach]
- 3.[Skill #3] - [Development approach]

## Manager Feedback

What I appreciate most about your performance:

Areas where I'd like to see continued growth:

How I can better support you:

Recognition and achievements to celebrate:

## Employee Self-Assessment

What I'm most proud of this period:

My biggest challenges were:

What I learned:

What I need to be more effective:

My goals for the next period:



## 360-Degree Feedback (if applicable)

### Peer Feedback Summary

#### Strengths identified:

- [Strength #1]
- [Strength #2]
- [Strength #3]

#### Development areas identified:

- [Area #1]
- [Area #2]
- [Area #3]

### Direct Report Feedback (for managers)

#### Leadership strengths:

- [Strength #1]
- [Strength #2]
- [Strength #3]

#### Leadership development areas:

- [Area #1]
- [Area #2]
- [Area #3]



Performance Improvement Plan (if needed)

Performance Concerns

Issue #1: [Specific performance issue]

Impact: [How it affects work/team/company]

Expected improvement: [What needs to change]

Timeline: [When improvement must be shown]

Issue #2: [Specific performance issue]

Impact: [How it affects work/team/company]

Expected improvement: [What needs to change]

Timeline: [When improvement must be shown]

Support Provided

- Additional training
- Increased supervision
- Modified responsibilities
- Coaching/mentoring
- Resources and tools

Review Schedule

- 30-day check-in scheduled
- 60-day review scheduled
- 90-day final assessment scheduled





## Compensation Discussion

### Current Compensation

Base Salary: [Amount]

Bonus/Incentive: [Amount]

Benefits: [Summary]

### Compensation Changes (if applicable)

Salary Adjustment: [Amount and effective date]

Bonus Adjustment: [Amount and effective date]

Promotion: [New title and effective date]

Justification: [Rationale for changes]

### Action Items & Follow-Up

#### Manager Action Items

- [Action item #1] - Due: [Date]
- [Action item #2] - Due: [Date]
- [Action item #3] - Due: [Date]

#### Employee Action Items

- [Action item #1] - Due: [Date]
- [Action item #2] - Due: [Date]
- [Action item #3] - Due: [Date]

#### HR Action Items

- [Action item #1] - Due: [Date]
- [Action item #2] - Due: [Date]
- [Action item #3] - Due: [Date]



## Review Meeting Notes

Key Discussion Points:

Agreements Reached:

Questions to Follow Up On:

Next Review Date:\*\* [Date]

### Signatures

Employee: I have reviewed this performance evaluation and discussed it with my manager.

Employee Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Manager: I have conducted this review and discussed it with the employee.

Manager Signature: \_\_\_\_\_ Date: \_\_\_\_\_

HR Review: (if required)

HR Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Employee Comments (Optional)

Additional comments or concerns:

Disagreements with assessment:

Additional context or information:

