Performance Review Form

Before the meeting, the employee fills Self rating and answers the self-evaluation questions. The manager then fills Manager rating and Notes using the rating scale on this form, and both sign.

Employee details

Field	Entry
Employee name	
Job title	
Department	
Manager	
Review type (Annual, Mid-year, Quarterly, 90-day or Probation)	
Review period	
Review meeting date	

Review items

Item	What Meets expectations looks like	Weight	Self rating	Manager rating	Notes
Quality of work	Work is accurate and complete; rework is rare	15%			
Job knowledge	Handles routine and most non-routine tasks without help	10%			
Communication	Gives clear, timely updates to the right people	10%			
Teamwork and collaboration	Shares work and helps teammates when asked	10%			
Reliability and ownership	Meets commitments or flags risk early	10%			

Item	What Meets expectations looks like	Weight	Self rating	Manager rating	Notes
Goal 1:	Achieved as agreed, against its measure of success	15%			
Goal 2:	Achieved as agreed, against its measure of success	15%			
Goal 3:	Achieved as agreed, against its measure of success	15%			

Overall score = sum of (weight x rating) / sum of weights. Rating bands: 4.50 and up = 5; 3.50 to 4.49 = 4; 2.50 to 3.49 = 3; 1.50 to 2.49 = 2; below 1.50 = 1.

Self overall score: _____ Manager overall score: _____ Overall rating: _____

Rating scale

Rating	Label	What it looks like
1	Does not meet expectations	Falls short of the standard for the item and needs close direction
2	Partly meets expectations	Meets part of the standard; needs regular help or correction
3	Meets expectations	Does what the role requires, consistently, without close supervision
4	Exceeds expectations	Regularly goes beyond the standard for the item
5	Far exceeds expectations	Well beyond the standard; others use the work as the example

Item	Rating 1 looks like	Rating 3 looks like	Rating 5 looks like
Quality of work	Frequent errors that others must fix	Accurate and complete; rework is rare	Sets the quality standard others copy
Job knowledge	Needs help with routine tasks	Handles routine and most non-routine tasks alone	Others come to them for answers
Communication	Updates are missing or late	Clear, timely updates to the right people	Anticipates what others need to know
Teamwork and collaboration	Works around the team rather than with it	Shares work and helps when asked	Improves how the team works
Reliability and ownership	Misses commitments without warning	Meets commitments or flags risk early	Takes ownership beyond the role

Item	Rating 1 looks like	Rating 3 looks like	Rating 5 looks like
Goals	Not achieved	Achieved as agreed	Exceeded the measure of success

A 2 or a 4 sits between the behaviors next to it.

Self-evaluation

What did you accomplish this period that you are most proud of, and what was the result?

_____

Which goal did you miss or change, and why?

_____

What got in the way of your work?

_____

Which skill do you want to build next period?

_____

What support do you need from your manager?

_____

What should you start, stop or continue doing?

_____

Next period goals

Goal	Why it matters	Measure of success	Due date	Support needed	Check-in date

Summary and sign-off

■ The employee completed Self rating and the self-evaluation before the meeting

■ Every manager rating has a dated, specific example in Notes

■ Each next period goal has a measure of success and a check-in date

Key strengths: _____

Development areas: _____

Employee comments on the review: _____

Manager signature and date: _____

Employee signature and date: _____