# **Annual/Mid-Year Review | Performance Feedback Template**

**Introduction**

This template emphasizes tracking extended progress, usually focusing on big-picture success.

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| **Employee Name** |  | **Reviewer Name** |  |
| **Position/Role** |  | **Review Period** |  |
| **Department** |  | **Date of Review** |  |

**Instructions**

**1. Complete Each Section Thoroughly**:   
Encourage both the manager and the employee to provide real data or specific anecdotes.

**2. Review Together:**

Discuss ratings and comments during the formal review meeting.

**3. Agree on Actionable Next Steps:**

Identify resources and timelines for improvement and goal achievement.

**4. Keep for Future Reference:**

Use these documented insights during follow-up reviews, whether quarterly, mid-year, or annual.

## **Section 1: Role & Responsibilities**

Summarize the employee’s key responsibilities and evaluate their execution.  
**Key Responsibilities**

*[List the employee’s main duties or projects. Describe how well the employee has performed in relation to the duties and goals set for this review period]*

|  |  |
| --- | --- |
| **List of Responsibilities** | **Comments** |
| 1. |  |
| 2. |  |
| 3. |  |

**Overall Rating (1–5):** \_\_\_\_\_\_\_\_\_\_\_\_

**Overall Comments**

*[Add specific remarks on alignment with stated duties and alignment with the job description.]*

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## **Section 2: Core Competencies**

Evaluate performance in core competency areas for the role.

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| --- | --- |
| **Core Competencies** | **Rating (1-5)** |
| 1. |  |
| 2. |  |
| 3. |  |

**Overall Rating (1–5):** \_\_\_\_\_\_\_\_\_\_\_\_

**Comments**

*[Provide examples that highlight strengths or areas needing additional focus.]*

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## **Section 3: Achievements & Contributions**

**Major Accomplishments** *(Specific examples where the employee excelled or exceeds expectations)*

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**Alignment with Organizational Goals** *(Summarize how these achievements supported the broader objectives of the department or company)*

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**Overall Rating (1–5):** \_\_\_\_\_\_\_\_\_\_\_\_

**Comments**

*(Include specific examples of outstanding contributions and any quantifiable results.)*

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## **Section 4: Areas for Improvement & Development**

**Constructive Feedback**

*(Identify any performance gaps or areas for improvement to address in the long term.)*

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**Skill Enhancement Opportunities:**

*(Suggest training, workshops, or resources that might assist with performance gaps.*

*Recommend mentorship or job-shadowing if relevant.)*

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| --- | --- |
| **Further Training Suggestions** | **Support/Resources Needed** |
| 1. |  |
| 2. |  |
| 3. |  |

## **Section 5: Development Plan and Action Steps**

**Target Setting: Define Future Goals**

*(Define clear, measurable objectives for the next review period and assign each a target deadline)*

**Goal 1:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

**Goal 2:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

**Goal 3:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Target Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |
| --- |
| **Action Plan** |
| 1. |
| 2. |
| 3. |

## **Section 6: Employee Self-Assessment**

*(Encourage the employee to describe their own performance in areas such as responsibilities, core competencies, and achievements. Invite them to share any challenges, successes, or insights.)*

**Employee Reflection**

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**Employee requests for resources, training, or career advancement**

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**Employee thoughts on team support, leadership support, or organizational improvements**

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## **Reviewer’s Final Summary & Signatures**

*(Use this space to combine insights from all sections and provide a final recommendation or overview. Include any important notes on the employee’s potential growth, upcoming changes to roles or responsibilities, and the agreed-upon timeline for future reviews..)*

|  |  |
| --- | --- |
| **Employee Overall Rating (1–5)** |  |

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| --- |
| **Rating Scale Legend (1–5):**  **1 – Unsatisfactory:** Performance does not meet expectations; significant improvement needed.  **2 – Needs Improvement:** Below expectations in key areas; some improvement required.  **3 – Meets Expectations:** Satisfactorily meets job requirements and objectives.  **4 – Exceeds Expectations:** Often exceeds job requirements; performance frequently goes beyond expectations.  **5 – Outstanding:** Far exceeds all expectations; consistently exceptional performance. |

**Final Comments**

*(E.g., Overall, the employee has demonstrated strong leadership in project delivery and consistent communication with stakeholders. Focus on building advanced technical skills over the next quarter.)*

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**Reviewer Signature:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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