Performance review

Annual or mid-year review for one employee · meeting 45–60 minutes

01 HOW TO USE THIS FORM

1. Two weeks before: agree the date and share this form.
2. At least 3 working days before: the employee shares the self-assessment. The manager gathers evidence from the whole period and asks 2–4 colleagues for input.
3. In the meeting: the employee speaks first. Then go through goals and competencies, and agree on development and next goals.
4. Within 5 working days: send the final version. The employee adds comments, and both sign.
5. Before you finish: book the first check-in.

02 REVIEW DETAILS

The employee can ask for a copy of this form, and factual errors are corrected on request. Don't record health details or reasons for absence here.

Employee	
Job title and level	
Team	
In this role since (optional)	
Reviewer (manager)	
Role expectations	Link to the job description or career framework
Review period	
Review type	Annual / Mid-year / Other
Meeting date	
Who sees this form	Stored in [system]. Visible to the employee, the manager and HR. Kept for [period].

03 RATING SCALE

Rate results and behaviour across the whole period, not just recent weeks, against the agreed goals and with evidence. If hours, scope or time in the role changed, or adjustments were agreed, rate against goals adjusted for that and record the adjustment, not the reason. Don't rate personality, or anything linked to leave, health, pregnancy, age or other protected characteristics.

Rating	Label	What it means
1	**Below expectations**	Most agreed goals were not met. A clear improvement plan is needed.
2	**Partly meets expectations**	Some goals were met. There are specific gaps to close with support.
3	**Meets expectations**	Agreed goals met at the expected quality. A solid rating, not an average one.
4	**Exceeds expectations**	Results went beyond the agreed goals or were delivered in harder conditions.
5	**Outstanding**	Results far beyond the role, with impact the wider company can see.
N/E	**Not enough evidence**	Too little to go on this period, for example new in the role. Say what evidence you'll collect and by when.

04 GOALS AND RESULTS

If a goal changed during the period, note when and who agreed it, and rate against the updated goal.

Goal for this period	How success was measured	Result and evidence	Rating

05 COMPETENCIES

3 means the description fits. For 4–5, give an example beyond it; for 1–2, an example of the gap. A good example says what happened, what the person did, the result and when.

Competency	What good looks like in this role	Examples from this period	Rating
Quality of work	Work is accurate, tested and needs little rework.		
Ownership	Takes responsibility for outcomes, raises risks early, follows through.		
Collaboration	Works well across teams, shares knowledge, helps others succeed.		
Communication	Clear in writing and in meetings. Keeps stakeholders informed.		
Growth and learning	Builds the skills the role needs and acts on feedback.		
[Company value or role skill]	[What good looks like]		
Leading people (managers only)	Sets clear goals, gives regular feedback, develops the team.		

06 FEEDBACK FROM OTHERS (OPTIONAL)

Ask 2–4 people who worked closely with the employee. Summarise themes, use roles rather than names, and leave out anything they didn't see first-hand.

From (role)	What they saw first-hand	How collected

07 SELF-ASSESSMENT

The employee shares this with the manager at least 3 working days before the meeting. It is kept with the review.

What went well this period, and what are you most proud of?

What was harder than expected, and what did you learn?

Did anything outside your control affect your results?

What support do you need from your manager or the company?

What should your manager start, stop or continue doing?

Where do you want to grow in the next 12 months?

08 MANAGER SUMMARY

Main strengths, with examples

Areas to develop, with examples

Overall rating (1–5 or N/E) and how it was reached

09 DEVELOPMENT PLAN

Not only courses: projects, mentoring, shadowing and stretch tasks count.

What to develop	Actions	Support needed	How we'll know it worked	By when

Career interest, in the employee's words (optional)

10 GOALS FOR THE NEXT PERIOD

Goal	How success will be measured	Supports (team or company goal, optional)	Due date

First check-in

11 COMMENTS AND SIGN-OFF

If the employee disagrees, they write it under Employee comments and contact [HR contact] within [10 working days].

Was anything in this review new to you?

No / Yes — what:

Employee comments

Pay and promotion

This review is one input into pay decisions under [policy name], which every employee can read at [where]. Promotion readiness is assessed separately against [criteria].

Signatures

Employee _____ Date _____ Manager _____ Date _____ Second reviewer (optional) _____ Date _____

Signing confirms the review was discussed. It does not mean the employee agrees with every point.