

Refer to the **Performance Review Instructions** document to complete this form.

## Overview

<b>Employee Name:</b>	Employee Name
<b>Title:</b>	Employee Title
<b>Review Conducted By:</b>	Name, Title
<b>Review Period:</b>	From Example: January 01 2017 to December 31, 2017
<b>Next Work Plan Period:</b>	From Example: January 01 2018 to December 31, 2018
<b>Meeting Date:</b>	DD/MM/YYYY
<b>At Time of Review:</b>	Choose an item.
<b>Review Purpose:</b>	Choose an item.

## My Experience & Satisfaction

<b>My sense of collegiality with other staff.</b>	
Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>The degree to which I feel respected by those with whom I work.</b>	
Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>My overall ability to keep up with my job responsibilities in a standard work week.</b>	
Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>My overall satisfaction level with my job.</b>	
Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Is there anything else you would like to tell us?</b>	
<b>Employee Comments:</b> <input type="text"/>	

## Reviewing the Previous Period

### GOAL ACHIEVEMENT

SECTION NOT APPLICABLE

Work Goal #1 - EXAMPLE: Upgrade operating system on all Company computers		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

Work Goal #2		
<b>Employee Rating:</b>	Choose an item.	<b>Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Comments:</b> <input type="text"/>

### OTHER ACCOMPLISHMENTS

SECTION NOT APPLICABLE

*Optional. Complete for other accomplishments or results outside of defined goals above.*

Example: Took strong leadership role in organizing the holiday party and summer social events. Thank you!		
<b>Employee Comments:</b> <input type="text"/>		
<b>Manager Comments:</b> <input type="text"/>		

Accomplishment/project #2		
<b>Employee Comments:</b> <input type="text"/>		
<b>Manager Comments:</b> <input type="text"/>		

### AREAS OF EXCELLENCE

Overall, you excel / are an example to others in the following areas.

<b>Example: Applies logic and reasoning to question the status quo and improve systems. Well done!</b>
<b>Employee Comments:</b> <input type="text"/>
<b>Manager Comments:</b> <input type="text"/>

<b>Area of Excellence #2</b>
<b>Employee Comments:</b> <input type="text"/>
<b>Manager Comments:</b> <input type="text"/>

**AREAS FOR DEVELOPMENT IDENTIFIED IN LAST REVIEW PERIOD**

SECTION NOT APPLICABLE

<b>Example: Increase customer satisfaction feedback score to 4</b>
<b>Action Taken:</b> <input type="text"/>
<b>Employee Comments:</b> <input type="text"/>
<b>Manager Comments:</b> <input type="text"/>

<b>Area of Development #2</b>
<b>Action Taken:</b> <input type="text"/>
<b>Employee Comments:</b> <input type="text"/>
<b>Manager Comments:</b> <input type="text"/>

**TECHNICAL TRAINING & LEARNING**

SECTION NOT APPLICABLE

List any technical training or learning undertaken in the last period.

Activity	Comments (if applicable)
Example: Completed LinkedIn Learning SEO 101 course	<input type="text"/>
<input type="text"/>	<input type="text"/>

## Position Competencies

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Refer to your job description for the following 2 sections.

### JOB-SPECIFIC SKILLS

Rate your current level of competence in the job-specific skills required for your position.

Example: Troubleshooting Technical Issues		
<b>Employee Rating:</b>	2. Competent	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

Job Specific Skill #2		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

### POSITION SUCCESS TRAITS

Rate your current level of competence in the success traits required for your position.

Example: Composure/Emotional Maturity		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

Success Trait #2		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

**MANAGEMENT/LEADERSHIP COMPETENCIES (MANAGERS ONLY)**

SECTION NOT APPLICABLE

Leadership, Mentoring & Performance Management of Direct Reports		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

Project Management/Results		
<b>Employee Rating:</b>	Choose an item.	<b>Employee Comments:</b> <input type="text"/>
<b>Manager Rating:</b>	Choose an item.	<b>Manager Comments:</b> <input type="text"/>

**Planning for the Next Review Period**

*This section outlines goals, areas for development, and training/learning plans for the next period. Achievement of these will be reviewed during your next performance review.*

<b>Next Review Period</b>	<b>Start Date:</b>	<input type="text" value="DD/MM/YYYY"/>	<b>End Date:</b>	<input type="text" value="DD/MM/YYYY"/>
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**GOALS**

Goals	
1	<b>Goal</b>
	Description <input type="text"/>
	<b>Target Completion Date:</b> <input type="text" value="DD/MM/YYYY"/>
2	<b>Goal</b>
	Description <input type="text"/>
	<b>Target Completion Date:</b> <input type="text" value="DD/MM/YYYY"/>

### AREAS FOR DEVELOPMENT

Competency	Suggested Development
Example: Composure	Example: Refrain from speaking harshly to customers. Escalate contentious discussions.
Competency #2	

### TRAINING & LEARNING PLAN

Training/Learning Plan		Details/Comments
1	Training or development initiative	
2	Training or development initiative	

### Summary Rating & Sign-Off

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#### PERFORMANCE RATING FOR THE REVIEW PERIOD

Choose an item.

Manager's Comments:

#### SIGN OFF

##### EMPLOYEE

I, **Employee Name**, acknowledge and agree that I have read and understand the feedback provided in this Form.

Employee comments attached: Yes  No

*Employee comments may be provided on a separate page and attached to this document. Comments must be dated and signed by the employee*

Employee Signature

Date

**MANAGER**

<b>Manager: Name, Title</b>	
Signature	Date

**REVIEWED BY**

<b>Name of manager's manager, Title</b>	
Signature	Date