

# Year-end Performance Review Templates



# Year-end Performance Review Templates

*Below you will find 2 sample templates that can be used to conduct an employee year-end review.*

## TEMPLATE #1:

### Instructions

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Please complete this assessment form. Your honest feedback will help you and your manager discuss about goals, performance and challenges.

### Employee Feedback

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The following questions are to be answered by the employee only. We ask that you be as specific as possible when answering these questions, ideally providing examples.

### Job Responsibilities

- 
- 1 What do you consider to be your top three to five job responsibilities?
  2. Did you take on any new responsibilities that are not usually part of your regular tasks? If so, what are they?
  3. What aspects of your job do you enjoy the most?
  4. What aspects of your job would you like the most to change and why?
  5. What do you enjoy most about working for this company?  
What could be improved?

## Overall Performance

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1. What are your greatest accomplishments for this review cycle?
2. Are there additional goals/projects that you have accomplished that your manager should know about?
3. What goals/deliverables were you least proud of? Why? How will you do those differently in the future?

## Growth & Development

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1. What activities, classes or training have you participated in that has contributed to your own growth and development in your job and/or your profession?
2. In what areas would you like to gain more experience, training, or education?
3. What do you need from your manager/supervisor to make that happen?

## Rating questions

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The following questions will be rated by both the employee and the manager. Please use the following rating scale to answer each question below.

Not at all	Rarely	Sometimes	Often	Always
1	2	3	4	5

## Collaboration

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**This person ...**

Reaches out to peers to initiate collaboration frequently.

1	2	3	4	5
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Guides group discussion when people need to make a decision together.

1	2	3	4	5
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Demonstrates willingness to assist others with problems.

1	2	3	4	5
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## Accountability

### This person ...

Takes responsibility for mistakes, working to correct them.

1 2 3 4 5

Welcomes feedback from others, carefully listening to their input.

1 2 3 4 5

Demonstrates measurable improvement after receiving constructive criticism.

1 2 3 4 5

## Adaptability

### This person ...

Handles pressure calmly and skillfully, responding to current team needs.

1 2 3 4 5

Embraces change when confronted with new plans, technologies, or situations.

1 2 3 4 5

Stays flexible when last-minute changes to plans are necessary.

1 2 3 4 5

## Change Management

### This person ...

Communicates appropriately with the manager when circumstances call for a change in plans.

1 2 3 4 5

Looks for new ways to use available tools to address changing circumstances.

1 2 3 4 5

Helps team members adapt to changes.

1 2 3 4 5

## Goal Completion

The following section should include the employee's individual goals, to be rated by the employee and his manager using the rating scale provided below. Using a software like Primalogik will allow you to automatically include goals for the matching review cycle, with the ability to add ratings and/or comments.

Not achieved	Partially achieved	Achieved	Outstanding	N/A
1	2	3	4	5

## Manager Feedback

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The following questions are to be answered by the manager only. We ask that you be as specific as possible when answering these questions, ideally providing examples.

## Overall Performance

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1. List aspects of employee's performance that require improvement for greater effectiveness.
2. List all aspects of employee's performance that contribute to his or her effectiveness.
3. What do you feel are this person's greatest accomplishments during this review period?
4. What goals/deliverables were not a success? Why?
5. Overall performance rating.
  - ☐ Needs development
  - ☐ Meets some expectations
  - ☐ Consistently meets expectations
  - ☐ Often exceeds expectations
  - ☐ Sets a new standard of performance

## Growth & Development

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Answers for this section will not be shared with the employee, only with HR.

1. What skills/areas should this person be focusing on improving?
2. What type of training would you recommend this person have?
3. Does this employee have potential to become a leader in the organization?
  - ☐ Yes
  - ☐ Maybe, with some additional training
  - ☐ No

# TEMPLATE #2:

## Instructions

Please complete this short assessment form. Your honest feedback will help you and your manager discuss about goals, performance and challenges.

## Employee Feedback

The following questions are to be answered by the employee only. When answering open-ended questions, we ask that you be as specific as possible, ideally providing examples. For rating questions, please use the following rating scale.

Strongly Disagree

1

Disagree

2

Neutral

3

Agree

4

Strongly Agree

5

## Overall Experience

I am enjoying the tasks/projects associated with my job.	1	2	3	4	5
I have received enough training to help me successfully reach my goals.	1	2	3	4	5
I feel appreciated by my team members.	1	2	3	4	5
Me and my fellow team members are collaborating effectively.	1	2	3	4	5
I am receiving enough feedback, guidance and assistance from my manager.	1	2	3	4	5

Is there anything you want to add regarding the above items?

## Additional Feedback

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1. What helps you to do your best work?
  2. What do you enjoy most and least about your job?
  3. What have you found most challenging?
  4. What could help you be more productive?
  5. What training and development opportunities would you be interested in?
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## Goal Completion

The following section should include the employee's individual goals, to be rated by the employee and his manager using the rating scale provided below. Using a software like Primalogik will allow you to automatically include goals for the matching review cycle, with the ability to add ratings and/or comments.

Not Achieved	Partially Achieved	Achieved	Outstanding	N/A
1	2	3	4	5

1. What accomplishments are you most proud of?
  2. What deliverables do you aim to achieve in the next three months?  
Six months?
  3. Do you need any additional support or resources to reach your goals?
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## Manager Feedback

Only the manager will be asked the following questions regarding their employee's overall performance.

## Overall Assessment

- Overall performance rating:
- ☐ Needs development
  - ☐ Meets some expectations
  - ☐ Consistently meets expectations
  - ☐ Often exceeds expectations
  - ☐ Sets a new standard of performance

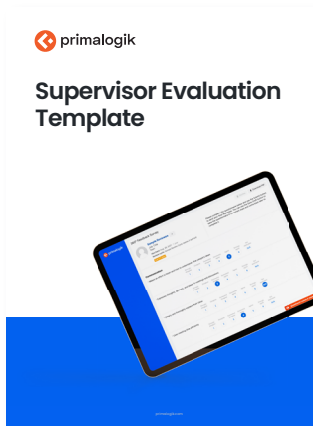
# Was this helpful?

Take the next step.



## Mid-Year Review Template

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## Supervisor Evaluation Template

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