Performance Evaluation Form

Use this form to review agreed job expectations over a defined period, discuss evidence with the employee, and set practical next steps. Replace the sample expectations with those for the role before the review.

EMPLOYEE NAME OR ID

ROLE

REVIEWER

REVIEW PERIOD

CONVERSATION DATE

NEXT CHECK-IN DATE

1. ROLE EXPECTATIONS AND REVIEW SCOPE

EXPECTATIONS AGREED FOR THIS PERIOD, AND ANY CHANGES IN DUTIES, WORKLOAD, OR RESOURCES

2. REVIEW OF AGREED EXPECTATIONS

Write an assessment backed by dated examples. If you use ratings, use your organization's defined scale. Leave an item unassessed if you lack evidence and say what is missing.

EXPECTATION OR GOAL	EVIDENCE AND EMPLOYEE PERSPECTIVE	ASSESSMENT
Job quality		
Reliability and follow-through		
Collaboration		
Role-specific goal		

STRENGTHS AND CONTRIBUTIONS

3. DEVELOPMENT AND FOLLOW-UP

DEVELOPMENT PRIORITIES (A SMALL NUMBER, TIED TO THE ROLE) AND THE SUPPORT NEEDED

General template, not legal advice. Adapt it to your policies and confirm requirements for your location with a qualified adviser.

PERFORMANCE EVALUATION FORM (CONTINUED)

NEXT ACTION AND HOW PROGRESS WILL BE CHECKED	OWNER AND SUPPORT	TARGET DATE

EMPLOYEE COMMENTS: PERSPECTIVE, QUESTIONS, CORRECTIONS, PROPOSED NEXT STEPS

REVIEW SUMMARY AND ANY UNRESOLVED QUESTIONS

Use your organization's acknowledgment process. Signing confirms the review took place. It does not mean the employee agrees with every assessment.

EMPLOYEE: PRINTED NAME | **SIGNATURE** | **DATE**

REVIEWER: PRINTED NAME | **SIGNATURE** | **DATE**

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