



Annual Performance Review

A balanced review form covering results, behaviors, growth, and forward-looking goals.

PURPOSE	Create a documented conversation about performance, support, development, and priorities.
BEST FOR	Managers and employees completing an annual or periodic review.

Employee	_____	Role	_____
Department	_____	Manager	_____
Review period	_____	Review date	_____
Employee input date	_____	Finalized date	_____

Rating scale

1	2	3	4	5
Needs significant improvement	Developing	Meets expectations	Exceeds expectations	Exceptional

1. Performance factors

FACTOR	RATING	EVIDENCE / COMMENTS
Results and quality		
Role knowledge		
Communication		
Collaboration		
Reliability and ownership		
Problem solving		

FACTOR	RATING	EVIDENCE / COMMENTS
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Customer / stakeholder service

Most significant accomplishments and impact

Challenges, lessons, and support needed

2. Goals for the next period

GOAL / OUTCOME	MEASURE	OWNER / SUPPORT	TARGET DATE
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Employee comments

3. Acknowledgement

ROLE	NAME / SIGNATURE	DATE
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Employee

Manager

Additional reviewer, if used

Use notes

Educational use only. This template is a general operational aid, not legal, tax, payroll, benefits, safety, or other professional advice. Adapt it to your organization, protect confidential information, verify current requirements, and consult qualified advisors when appropriate.

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