

# Mid-Year Performance Review Template

## Purpose:

- Provide ongoing direction and support necessary to ensure annual goals are achieved
- Engage and encourage employee
- Assess progress against established goals and ensure continued alignment with overall organizational goals
- Determine if additional measurement, resources, support are needed
- Avoid surprises at end of year performance review

## Structure & Process:

- Provide employee with information on purpose, process and mid-year performance template for self assessment and preparation in advance
- Complete mid-year performance template for employee (same template is used by both)
- Hold meeting in neutral, non threatening, comfortable location
- Keep review informal and encourage open two way dialogue
- Review past 6 six months with focus on actions/steps necessary for employee to achieve goals
- Agree on next steps, and confirm follow up actions

## Performance Review Questions:

1. Where are you in terms of the business goals you established at the beginning of the year?
2. How well do your current goals align with those of the organization/team/personal?
3. What changes, if any, need to be made to your goals to ensure success at year end?
4. What has gone well and is working?
5. What challenges have you faced and what isn't working/needs to change?
6. What can I/organization do to support you in reaching your goals?
7. What other suggestions do you have for me/organization?

## Next Steps:

- Summarize discussion/agreed upon actions/changes/support needed
- Schedule follow up meeting to discuss progress towards goals and agreements made in mid-year performance review

# Mid-Year Performance Review Template

Employee Name: \_\_\_\_\_

Supervisor/Manager Name: \_\_\_\_\_

Position/Department: \_\_\_\_\_

Title/Department: \_\_\_\_\_

1. Where are you in terms of the business goals you established at the beginning of the year?

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2. How well do your current goals align with those of the organization/team/personal?

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3. What changes, if any, need to be made to your goals to ensure success at year end?

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4. What has gone well and is working?

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5. What challenges have you faced and what isn't working/needs to change?

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6. What can I/organization do to support you in reaching your goals?

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7. What other suggestions do you have for me/organization?

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## Next Steps:

- Agreed upon actions/changes/support needed
- Follow up meeting required (when, where, purpose)

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Supervisor's/Manager's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee's Signature

\_\_\_\_\_  
Date