

Reviews and Feedback

Annual Performance Review Template

A complete review form with a rating scale that is actually defined, evidence built into every rating, and the calibration step that makes ratings comparable across managers.

Most free review templates hand you a 1 to 5 scale and no definition of what any of the numbers mean. That single omission is why two managers assessing identical performance produce different ratings, and why an employee's score often says more about who they report to than how they worked. This template defines the scale behaviorally, requires evidence for every rating, and includes the calibration step before results are shared.

Employee name		Job title	
Department		Manager	
Review period from		Review period to	
Date of review meeting		Review type	

Section 1. The rating scale

Use these definitions as written. Changing the wording between teams reintroduces exactly the inconsistency the scale exists to remove.

Rating		What it means
5	Consistently exceeds	Delivers beyond the requirements of the role as a sustained pattern, not on one occasion. Work is used as a reference standard by others. Takes on scope beyond the role without being asked.
4	Frequently exceeds	Meets every requirement of the role and exceeds several of them. Handles complexity above the role's baseline. Requires little direction.
3	Meets	Delivers what the role requires, reliably, across the review period. This is a good rating and the expected rating for solid performance.
2	Partially meets	Meets some requirements and falls short on others. Requires more direction than the role assumes. A development plan applies.
1	Does not meet	Falls short of the core requirements of the role. An improvement plan applies.

Read this before you rate anyone

A 3 means the person did the job they were hired to do well. In a healthy organization, most people sit there. Rating inflation almost always begins with managers treating 3 as a failing grade and moving everyone to 4 to avoid an awkward conversation. When that happens, the scale stops carrying information, and the employees who genuinely exceed lose the recognition that should distinguish them.

Section 2. Results

What was delivered against what was agreed. Evidence is a required field. A rating with no example attached is an opinion, and it will not survive the calibration session or a conversation with the employee.

Goal or accountability	What was delivered	Evidence	Rating

Overall results summary

Section 3. Competencies

Rated separately from results, and deliberately so. A person can hit every number in a way that damages the team around them, and a review that cannot say that is not doing its job. Adjust the competency set by role, but keep it consistent for everyone in the same role.

Competency	What good looks like	Specific example	Rating
Quality of work	Accurate, complete, meets the standard without rework		
Dependability	Commitments are met, deadlines are met, follow-through is consistent		
Collaboration	Works well across the team, shares information, supports others		
Communication	Clear, timely, adapts to the audience, raises issues early		
Judgment and decisions	Sound decisions with available information, knows when to escalate		
Adaptability	Adjusts to changing priorities without losing effectiveness		

Section 4. Bias check before you submit

Complete this before the review goes to calibration or to the employee. It takes two minutes, and it catches the errors that are hardest to see in your own work.

☐	Recency. Does this review reflect the full review period, or mostly the last six weeks?
☐	Halo and horn. Has one particularly strong or weak area colored every other rating?
☐	Central tendency. Have you rated everything a 3 to avoid a difficult conversation?
☐	Comparison. Are you rating against the standard for the role, or against the strongest person on your team?
☐	Similarity. Are you rating more generously where someone's style resembles your own?
☐	Evidence. Does every rating above or below a 3 have a specific example attached?

Section 5. Calibration preparation

Ratings should not go to employees until they have been compared across managers. This section is what you bring to that session. Complete it before the meeting, not during it.

Rating		Number of your team members at this rating
5	Consistently exceeds	
4	Frequently exceeds	
3	Meets	
2	Partially meets	
1	Does not meet	

Ratings you expect to be challenged on, and why	
Evidence supporting your highest rating	
Evidence supporting your lowest rating	
Anything about this period that affected the team's results <i>Team changes, workload, systems, leave</i>	

Why this step exists

Calibration is the only mechanism that makes a 4 from one manager mean the same thing as a 4 from another. Without it, ratings are comparable within a team and meaningless across the organization, which becomes a real problem the moment those ratings inform pay, promotion, or a decision that has to be defended.

Section 6. Development and the period ahead

Strengths to build on	
Areas to develop <i>Be specific. What, and what does progress look like</i>	
Support the organization will provide <i>Training, coaching, exposure, or access. Include an owner</i>	
Goals for the next period	
Career interests the employee has expressed	

Section 7. Employee comments

The employee may record a response before signing. This is completed after the review conversation, not before it.

Employee response

Section 8. Acknowledgement

Signature confirms that this review has been received and discussed. It does not indicate agreement with the ratings.

Employee signature and date	Manager signature and date	Reviewer signature and date

Using this in PerformSpark

In PerformSpark, ratings from every manager are compared side by side before results are released, with distribution analysis and statistical checks applied to the set. Calibrated ratings then carry through to compensation planning without manual re-entry, so the number agreed in the session is the number the decision is based on.

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PerformSpark

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Conduct comprehensive annual performance evaluations with structured goals, achievements, feedback, and future development planning seamlessly.

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