



# Mid-Year Review Template

**Directions:** This mid-year review template includes a self-evaluation, a manager evaluation, and a meeting agenda. Once both review forms have been completed, the manager and direct report can schedule a meeting that centers around the review form answers.

# Self-Evaluation

Please take some time to reflect on your work over the six months and share answers to the following questions with your manager.

**On a scale of 1-5, how would you rate yourself on performing your job duties over the past six months?**

1. Unsatisfactory
2. Inconsistent
3. Meets Expectations
4. Exceeds Expectations
5. Exceptional

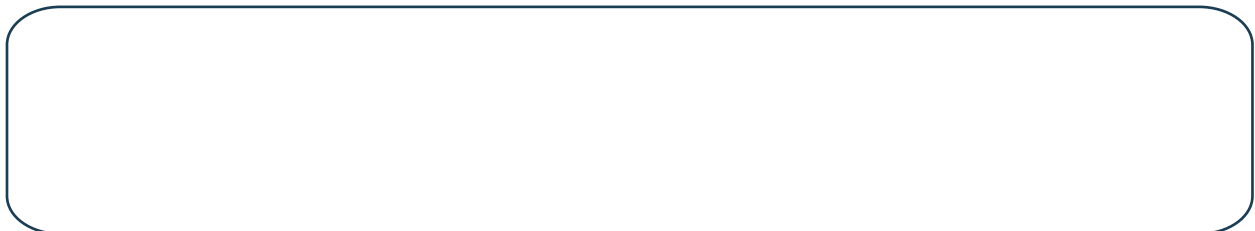
**On a scale of 1-5, how would you rate yourself on showing initiative over the past six months?**

1. Unsatisfactory
2. Inconsistent
3. Meets Expectations
4. Exceeds Expectations
5. Exceptional

**On a scale from 1-5, how would you rate your satisfaction with your role over the past six months?**

1. Not at all satisfied
2. Partly satisfied
3. Satisfied
4. More than satisfied
5. Very satisfied

**Is there anything your manager can do to better support you?**



# Manager Evaluation

Please take time to reflect on the employee's work over the past six months.

**What is one area in which the employee has excelled over the past six months?**

**What is one area in which the employee could improve over the next six months?**

**On a scale from 1-5, how would you rate the employee's ability to perform their job duties over the past six months?**

1. Unsatisfactory
2. Inconsistent
3. Meets Expectations
4. Exceeds Expectations
5. Exceptional

**On a scale from 1-5, how would you rate the employee on showing initiative over the past six months?**

1. Unsatisfactory
2. Inconsistent
3. Meets Expectations
4. Exceeds Expectations
5. Exceptional

# Mid-Year Review Meeting Outline

## Start with the employee's goals

1. Are they on track?
2. Do any goals need to be revised?
3. What does the employee need from the manager to complete the goals in the next six months?

## Move on to the ratings from the review forms

4. For questions in which the employee and manager ratings align, manager should explain why they gave the score they did and ask why the employee gave the score they did.
5. For questions in which the ratings don't align, manager should give the employee a chance to explain their rating first. Manager should then explain why they gave their rating.

## Talk about how to keep positive trends going

6. Highlight positives from manager review form

## Talk about how to make improvements

7. Highlight the opportunities for improvement from the manager review form

## End by discussing how manager can better support employee

8. Discuss last question about manager support from employee review form



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