

**XYZ Family Foundation
Performance Assessment**

Employee Name:	
Position:	
Reviewer Name(s):	
Date of Assessment:	

Ratings:

- 4** - Exceeds expectations
- 3** - Meets expectations
- 2** - Partially meets expectations
- 1** - Does not meet expectations

****Notes are optional. Use Summary and Future Directions to elaborate on major themes.****

MAJOR RESPONSIBILITIES		
Responsibility	Rating	Notes
	Employee:	
	Reviewer:	
	Employee:	
	Reviewer:	
	Employee:	
	Reviewer:	

	Employee:	
	Reviewer:	
	Employee:	
	Reviewer:	
	Employee:	
	Reviewer:	

SUMMARY AND FUTURE DIRECTIONS

Reviewer's overall performance rating:

- ☐ Exceeds expectations
☐ Meets expectations
☐ Partially meets expectations
☐ Does not meet expectations

Employee's self-assessment of performance:

1. What are your top 3-5 accomplishments from the past year? (Reference priorities from previous performance assessments.)
2. What are 1-3 notable areas of strength?
3. What are 1-3 areas of growth or improvement?
4. What are your top 3-5 priorities for the coming year?

COMPENSATION

Employee: What salary considerations do you request?

Reviewer: What is the employee's salary next year (effective January 1)?

Reminder: Current salary is....

Reviewer, Title: _____ Date: _____

Employee: _____ Date: _____