

Annual Feedback & Development Plan





At Acacia, we believe that performance management should be simple, practical, and focused on growth. That is why we use this model with our own team and encourage you to make it your own. Think of this plan as a framework, not a rigid process. Adapt the questions, simplify where you need to, and add your own ideas so it works for your team.

How and when to use it:

- Annual Review: Use the full plan once a year to reflect on performance, exchange feedback, and set development goals.
- Quarterly Meetings: Revisit the plan every three months to check progress on goals, update development steps, and celebrate wins.
- Regular One-on-Ones: Pull from the questions in this plan during weekly or biweekly check-ins to keep conversations focused, consistent, and useful.

The goal is not to complete a form for HR's sake. The goal is to spark real conversations, build trust, and create a clear path for development all year long.

Example: When California bumped the minimum paid sick leave requirement from 24 to 40 hours, I didn't wait for the next review. I updated it right then.

SECTION 1: SELF-EVALUATION



Employees reflect on their own performance and development.

Prompts:

- **What are your top 2–3 highlights from the past year?**
- **What skills or strengths are you most proud of?**
- **What challenges did you face, and how did you work through them?**
- **What do you want to focus on improving this year?**



SECTION 2: EMPLOYEE FEEDBACK



Employees reflect on their own performance and development.

Prompts:

- **What are your top 2–3 highlights from the past year?**
- **What skills or strengths are you most proud of?**
- **What challenges did you face, and how did you work through them?**
- **What do you want to focus on improving this year?**

SECTION 3: MANAGER FEEDBACK

Managers provide feedback to the employee on performance and development.

Prompts:

- **What are 2–3 areas where this employee excels?**
- **What are 1–2 areas where improvement is needed right away?**
- **What skills or areas show the most potential for growth this year?**
- **How can you support this employee in their development?**

SECTION 4: DEVELOPMENT GOALS



Employee and manager set goals together for the upcoming year.

Prompts:

- **What career goals and aspirations do you want to work toward?**
- **What strengths can you continue to build on?**
- **What 3–5 improvement goals should we focus on this year?**

What professional development opportunities (training, mentorship, stretch projects) would help you grow?

SKILL & PROFICIENCY RATINGS (OPTIONAL)



Proficiency Levels:

- **Fundamental Awareness (basic knowledge)**
- **Novice (limited experience)**
- **Intermediate (practical application)**
- **Advanced (strong applied skills)**
- **Expert (recognized authority)**

SKILL	Demonstrated By	Employee Rating & Comments	Manager Rating & Comments=
Communication	Clear, concise, thoughtful, and respectful		
Collaboration	Builds strong working relationships across teams		
Accountability	Takes ownership and follows through		
Initiative	Anticipates needs and problem-solves independently		

PUTTING IT INTO ACTION

- **Keep it simple.** Pick no more than 3–5 top development goals.
- **Follow up quarterly.** Review progress together and adjust goals as needed.
- **Make it collaborative.** Both employee and manager should add notes and ideas.
- **Celebrate wins.** Recognize growth and progress, not just outcomes.

