

EMPLOYEE TOOLKIT

FY26 Performance Review Cycle

This pack contains supporting information for employees through the FY26 performance review cycle:

1. **Key Dates:** the full cycle timeline, from cycle opening (24 August) through self-assessment, manager assessment, skip-level calibration, and review conversations (by 9 October).
2. **All-Employee Email:** the kickoff communication explaining how the process will work this year.
3. **Your Guide to This Year's Review:** covering the four questions the self-assessment is built around; what a strong answer looks like at every rating level, per question; worked strong-vs-weak examples for writing your own self-assessment; and what happens next after each possible rating (Stretch goals for Exceeds, a growth conversation for Meets, a formal development plan for Does Not Consistently Meet, and a performance conversation for Does Not Meet).
4. **FAQs:** answering any questions you might have about this years review process.

Key Dates

What	When
Cycle opens in BambooHR	24 August 2026
Self-assessments due from your team	By 9 September 2026
Your assessments due (draft, unsubmitted)	By 9 September 2026
Skip-level calibration	By 23 September 2026
Performance review and development conversations (submit and discuss together)	By 9 October 2026

Your guide to this year's review

The Four Questions You'll Be Asked

Your self-assessment (and your manager's assessment of you) is built around four questions. These are:

- What accomplishments are you most proud of this year?
- How have you contributed beyond your immediate team this year?
- What areas are you working on or feel require further development?
- Overall, how would you rate your performance?

The fourth question doesn't need its own preparation - it's the overall judgment formed from your answers to the first three, not a separate piece of evidence.

Screenshot below of what an employee will see in BambooHR:

Self Assessment

What accomplishments are you most proud of this year?*

How have you contributed beyond your immediate team this year?*

What areas are you working on or do you feel require further development?*

Overall, how would you rate your performance?*

--Select--

Additional details (optional)

[Attach file\(s\)](#)

Submit

Save & Finish Later

Manager Assessment

Manager Assessment will show here once completed.

Screenshot below of what a manager will see in BambooHR:

Self Assessment

Nothing to see here...yet.
Self Assessment will show here once completed.

Manager Assessment

What were the employee's accomplishments this year?*

How has the employee contributed beyond their immediate team this year?*

What areas could the employee continue to develop?*

Overall, how would you rate the employees performance?*

--Select--

Additional details (optional)

[Attach file\(s\)](#)

Submit

Save & Finish Later

What Good Answers Look Like, By Rating

This isn't about guessing what rating you'll get, it's here to help you write a self-assessment with real substance, whatever your answer turns out to be.

What accomplishments are you most proud of this year?

Rating	What this looks like
Exceeds Expectations	An accomplishment that reshaped how a team or business unit operates, not just a completed task, something they drove without being asked to.
Meets Expectations	A solid, specific accomplishment within their scope, delivered reliably and with quality.
Does Not Consistently Meet Expectations	An accomplishment is named, but it's vague or the employee needed significant support to get there.
Does Not Meet Expectations	Little genuine evidence of a meaningful accomplishment this cycle.

How have you contributed beyond your immediate team this year?

Rating	What this looks like
Exceeds Expectations	Supported another business unit on a genuinely strategic initiative that belonged to that team, not just responsive input, but sustained contribution to something that mattered to them, with a clear result to show for it.
Meets Expectations	Pitches in beyond their own tasks when useful, and communicates proactively across teams.
Does Not Consistently Meet Expectations	Contributes when asked directly, but doesn't proactively reach out or loop others in.
Does Not Meet Expectations	Little to no contribution beyond their own tasks, or creates friction when working across teams.

What areas are you working on or feel require further development?

Rating	What this looks like
Exceeds Expectations	Names a genuine stretch area unprompted, and can point to how they've already started acting on feedback.
Meets Expectations	Identifies a real development area and shows they've acted on feedback when it's been given.

Does Not Consistently Meet Expectations	Accepts a development area when it's raised, but shows limited change in behaviour so far.
Does Not Meet Expectations	Dismisses or resists the idea that development is needed, or repeats the same issues after being told.

The fourth question - overall rating - doesn't need its own example table; it's the judgment call formed from the three answers above, not a separate piece of evidence.

Writing a Strong Self-Assessment: Strong vs Weak

A self-assessment with no specific evidence gives your manager and calibration nothing to check it against. These examples show the difference a specific, dated example makes.

Accomplishments — Meets Expectations

Weak	<i>"I did a good job this year and was reliable."</i>
Strong	"I independently managed the Q3 vendor transition after the original lead left mid-project — I kept it on schedule with no missed deadlines and proactively flagged a contract risk to Finance before it became a problem."

Contribution Beyond Team — Does Not Consistently Meet Expectations

Weak	<i>"I could work better with other teams."</i>
Strong	"I delivered strong technical work, but on three occasions this year — most recently the Marketing launch in June — other teams found out about scope changes only after they'd already built against the old spec. I know this needs to change for me to reliably hit Meets next cycle."

Development Areas — Exceeds Expectations

Weak	<i>"I'm always improving."</i>
Strong	"After feedback in March that my presentations were too technical for exec audiences, I restructured my next three board updates around business impact first and asked two colleagues to review drafts before presenting. This is now my default approach."

What makes the strong version work, every time:

- Names a specific project, date, or moment, not a general impression of yourself.
- Answers the actual question asked, rather than a generic summary.

- For development areas: names what you're actually doing about it, not just that you're "always improving."
- Reads the same whether you're confident about your year or not specificity helps either way.

What Happens After Your Rating

Every review includes a forward-looking conversation about what's next, the depth of that conversation depends on your rating:

Rating	What happens next
Exceeds Expectations	Your manager will sets stretch goals with you directly: a bigger project, more scope, mentoring others, or exposure to leadership.
Meets Expectations	A short conversation about one growth area, based on your development-areas answer. No separate planning session needed.
Does Not Consistently Meet Expectations	A proper development plan: 2–3 specific priorities agreed together with your manager and regular check-ins in your 1:1s.
Does Not Meet Expectations	Your manager will continue talking to you about your performance.

Support

Speak with your manager in the first instance. Your HRBP is available for anything you'd rather raise separately.

PERFORMANCE REVIEW FAQs

Everything you need to know before this year's review cycle

Is the annual review process changing?

This year's cycle is starting a little later than usual, following the recent transition, but the rhythm going forward stays the same.

What do I need to do, and when?

You'll complete a short self-assessment, and your manager will complete a matching assessment about you. Full dates will be confirmed before the cycle opens, along with a short briefing and a plain-language guide to help you prepare.

Is everyone included in this year's performance review?

Not everyone. If you joined on or after 1 April 2026, you won't be part of this cycle, you'll be included from next year instead, once there's been enough time in role for a meaningful assessment. If you joined before that date, you're in scope, though the New Starters guidance below may still apply if you're within your first few months.

What does each rating actually mean?

- Exceeds Expectations - consistently surpasses expectations for the role
- Meets Expectations - delivers consistently against expectations for the role
- Does not consistently meet expectations - some expectations met
- Does Not Meet Expectations - gaps and is not meeting expectations

Does how I've worked with others or lived our values factor into my rating?

Yes. Values are the underlying benchmark for every rating, not just an add-on, your rating always assumes there's no genuine, specific concern about how you've worked with others or upheld our values.

Does my rating come with a development plan, or is it just a label?

Every rating has a matching next step, the rating is the start of the conversation, not the end of it.

- Exceeds Expectations - your leader will set stretch goals with you directly, to keep building on that momentum.
- Meets Expectations - you and your manager will agree on one growth area, drawn directly from the development-areas question you'll each already have answered in the self- and manager assessment.
- Does not consistently meet expectations - you and your manager will co-create 2–3 specific development goals together, with regular check-ins through your normal 1:1s.
- Does Not Meet Expectations - performance conversation.

Is my performance review linked to my remuneration review?

Your rating is one input into compensation decisions, but it's not the only one. Overall budget and where your salary sits within the range for your role also factor in. Your manager will talk you through your rating in one conversation, and your compensation outcome separately in another a few weeks later.

Am I eligible for a remuneration review?

- Employees who have received a salary increase on or after 1 April 2026 will not be eligible for a remuneration review.
- Employees who have received an increase from 1 January 2026 may also not be eligible for an increase; this will depend on where they sit in the range for the role.
- Employees who are at the top of the salary range or benchmark may not be eligible for a remuneration review.
- Employees on a max term contract are not eligible for a remuneration review.

Where can I go if I have questions the FAQ doesn't cover?

Start with your manager, they'll have been briefed ahead of the cycle. You can also reach out to the People team directly at any point.

What if I don't agree with my rating?

Raise it with your manager first. Ratings are calibrated across managers before they're finalised, if something doesn't seem right, that calibration process is exactly what a conversation with your manager or the People team can revisit.