

STAFF APPRAISAL AND DEVELOPMENT

Aims of Appraisal

- To aid the continuing personal and professional development of the employee in ways which are of benefit to them and the (EMPLOYER NAME)
- To recognise the achievements of the employee during a defined period
- To assess work performance during the period and identify areas on which to build and areas of need which should be addressed
- To set goals for work and personal development for the next period
- To identify longer term personal and professional development needs and ways of addressing them through appropriate guidance and training
- To capture a summary of the above in writing for reference and reminder through the next period

Note: Although the purpose of Appraisal is primarily about the employee's development and support, the process may also result in suggested amendments to the job description and/or recommendations for the Supervisor's and/or Manager/s attention.

Ideally, the Appraiser/s and employee will have had a number of less formal conversations about work progress throughout the period. This is a formalised opportunity to take stock.

People to involve in the Appraisal Discussions

- The employee
- The employee's Appraiser/s
- If agreed by both the above, another person who knows the employee's work well or is agreed by both the employee and the Appraiser/s to be a source of useful advice in the appraisal process

Guidance for Areas of Discussion

The following are to be seen as guidelines for areas of discussion and points of agreement to be reached during the appraisal process:

- To what degree have the objectives (set at the previous appraisal or at the start of the job) been met or exceeded?
- What are the key elements of this work (up to five)?
- What has been going well? What is the evidence for saying this?
- What has been going less well? What is the evidence for saying this? Why was this so?
- Where have you been most effective in your work? Evidence and reasons for this.
- Where have you been least effective? Evidence? Reasons?
- What have been identified as the priorities and related targets for the next 12 months?
- What will you need (training, experience, resources etc) to enable these to be effectively achieved?
- What are your thoughts about improving the effectiveness of your relations with your Supervisor?
- What elements would you wish to change/develop within your job description?
- Are there issues related to Equalities or Health and Safety Policies that you wish to raise?

The above list should not be regarded as being exhaustive. Other issues and areas will inevitably become apparent as part of the appraisal process.

The full process is outlined overleaf, followed by an example of the documentation you might use to record the results of the completion of the process.

UNITED REFORMED CHURCH

Process for Appraisal

TASK

RESPONSIBILITY

Initial meeting between Appraiser/s and Employee to:

- Plan the appraisal process
- Agree the scope of the process and identify specific areas of the Employee's job upon which the appraisal should focus (max. 5 areas)
- Discuss self-appraisal element of process
- Negotiate and agree who should be approached by the Appraiser/s for feed-back (i.e. colleagues, users)
- Negotiate and agree what documentation should be provided by the Employee
- Agree date, time and place, format and agenda for the appraisal meeting
- Agree the arrangements and preparation of the appraisal record

**Appraisers/ and
Employee**

Gathering information

Self appraisal, as part of which the Employee may:

- Consider their job description and draft content for record
- Reflect on their strengths, skills, and areas for personal development and draft content for record
- Consider any additional information that may help the Appraiser/s

**Appraiser/s
Employee**

Appraisal meeting, to include:

- Review of any data, notes, documentation or observations collected
- Summary of the self-appraisal
- Highlighting strengths and successes and recognising weaknesses
- Discussion of role, contributions made and any constraints on work
- Identification of professional development needs
- Aspirations for the future
- Framing realistic targets/objectives and an action plan for achieving them (all to be specific, measurable, attainable, relevant and time constrained)
- Framing any recommendations for Supervisor
- Production of draft outline for appraisal record

**Appraiser/s and
Employee**

Writing of draft record (within 10 working days of appraisal meeting)

**Appraiser/s and
Employee**

Finalisation of record (within 20 working days of delivery of draft record)

**Appraiser/s and
Employee**

Copy of finally agreed record (dated and signed by Appraiser/s and Employee) to be retained by Employee and Supervisor for future reference.

**Supervisor or Holder
of Personal File on
Employee**