

Employees Guide to Appraisals

Purpose

Appraisal is a formal opportunity for you and your line manager to discuss your performance and development, as well as identify what support is required going forward

The meeting should give an opportunity for views to be shared in an open discussion

Appraisals assess work, achievement of objectives and behaviour, reflecting on past performance. They should also be the basis for making development and improvement plans and agreeing with you what actions are required

The Appraisal Meeting

During the appraisal the following things should be considered:

- **Objectives** – whether the previous objectives were achieved, but if not, what may have been the reasons for this
- **Progress** – whether you are performing above, within or below the requirements of the role
- **Action/Development** – what, if any training and development needs have been identified

Your Preparation

Your meeting will be more productive if you prepare by:

- Analysing your own performance, and self-assessing how well you have achieved your objectives
- What you have achieved since your last appraisal, with examples and evidence
- Any examples of objectives not achieved, with explanations
- What you most enjoy about the job and how you might want to develop the role
- Any aspect of the work in which improvement is required and how this might be achieved
- Your learning and development needs, with arguments to support your case for specific training
- What level of support and guidance you require from your manager
- Your aspirations for the future both in the current role and in possible future roles

- What might your objectives be for the next review period

Forms

Your line manager will give you a self-appraisal form to use to prepare for the meeting

Your line manager will complete an appraisal form and interim review form after the meeting and give you a copy to refer to

Ratings

You will be rated against your objectives, this will likely take the form of:

Exceeds Expectation - Consistently exceeds standards and responsibilities of the position. Achievements are beyond those reasonably expected

Meets Expectation - Consistently meets and sometimes exceeds standards of the position; achieves planned results

Needs Improvement - Meets the expectations in some job aspects but possesses one or more important performance deficiencies. Requires excessive supervision and training

Unacceptable - Fails to meet the expectations in most job aspects. Unable or unwilling to reach minimum levels of performance

The meeting

A good and constructive review meeting consists of:

- You doing the majority of the talking
- Your line manager listening actively to you
- Time for reflection and analysis
- Your performance is analysed
- The whole period is reviewed and not just recent or isolated events
- Your achievements are recognised
- The meeting ends positively with agreed actions