**Performance Appraisal Template**

***Note:*** *This template is an example you can adapt or develop to meet your needs*

**ANNUAL REVIEW – *Private and Confidential***

**SELF APPRAISAL NOTES**

The questions listed below are to aide your preparation for the appraisal. Completion of this form is not a requirement – it is optional. You may complete all or selected areas as appropriate and should take the form with you to your appraisal meeting. You will not be asked to hand in this form but to use it as the basis for your discussion with your appraiser.

Outline your progress against your objectives and your other achievements since your last appraisal

Are there any objectives not met – if so why?

Are there any other issues at present that are preventing you from doing your work? If so, how might they be resolved?

What are your strengths? (think of examples where you have been pleased with the quality of your work etc.)

What do you most enjoy about your role?

What ideas do you have on how to develop your role? Ideas for the company to improve its services?

What do you consider are areas for development? Any specific learning and development requirements?

What do you see as your priority tasks and/or priorities for the company for the coming year?

Any other feedback or comments?

**PERFORMANCE APPRAISAL FORM**

|  |
| --- |
| Name of employee:  Date appointed:  Job title:  Name of appraiser:  Date of this appraisal  Date of last appraisal: |

**Section A: Summary Performance**

Any changes to the job description since last review? (agree and make changes)

General view of how the employee is and how they feel the review period has gone

Details of particular strengths and areas of outstanding performance

Areas of interest, ambition and where support is needed

Are there any issues at present that are preventing employee doing their work and how might they be resolved?

Are there any ideas the employee has on how to develop their role/ Ideas for the company to improve its services?

**Section B: Performance review**

List the objectives and targets agreed at the last performance appraisal meeting (where these have changed, new objectives/targets should have been agreed to reflect changes in circumstances). Discuss with employee and comment on how effectively the objectives have been achieved over the review period.

|  |  |  |
| --- | --- | --- |
| **Objectives / targets**  **(including agreed dates for achievement)** | **Exceeds Expectation** **E**  **Meets Expectation** **M**  **Needs Improvement** **NI**  **Unacceptable** **UN** | **Comments** |
|  |  |  |

**Section C: Objectives for the coming review period**

Taking into account the objectives of the company, agree a new list of objectives / targets for the next 12 months.

|  |  |
| --- | --- |
| **Objectives/targets for the next 12 months** | **Date for achievement** |
|  |  |

**Training and development needs**

Based on your discussion today, make a note here of any training requirements you have identified. These can be: on-the-job training / in-house training sessions / secondment / external courses which may or may not lead to a qualification / any other professional development.

|  |  |
| --- | --- |
| **Topic** | **Type of training/development recommended** |
|  |  |

**Section D: Comments and signatures**

**Employee’s comments**

**Appraiser’s comments**

Please sign below to confirm that the appraisal meeting has taken place:

Employee’s signature: Date:

Appraiser’s signature: Date:

Appraiser’s manager’s signature: Date:

**INTERIM REVIEW FORM**

**Section A: Catch Up**

Any major obstacles / changes in work direction since last appraisal meeting?

|  |
| --- |
|  |

**Section B: Review of progress to date against current objectives**

|  |  |
| --- | --- |
| **Current Objectives** | **Progress to date / Training & Support received** |
|  |  |

**Section C: Comments and signatures**

**Employee’s comments**

**Appraiser’s comments**

Please sign below to confirm that the appraisal interview has taken place:

Employee’s signature: Date:

Appraiser’s signature: Date: