*\*\*BLUE TEXT SHOULD BE REMOVED BEFORE ISSUE\*\**

***Appraisal Procedure and Form***

*An annual appraisal is a formal evaluation when a review of an employee’s performance takes place. There should be no real surprises for the employee at the appraisal because if there have been performance or conduct problems, these should have been identified and dealt with when they occurred.*

Each year in ..................... *(insert month)*, you will take part in an appraisal session with your line manager. The purpose of the meeting is to discuss your performance, conduct and achievements during the previous year and to define performance objectives and training and career development needs for the future.

The outcome of the meeting should be a clear action plan for both you and your line manager in order to enable you to achieve your full potential in your job and to gain maximum job satisfaction. In turn, this will contribute towards the Company’s success.

Following the appraisal session, your line manager will complete an appraisal form as a record of the discussion that took place. This will also ensure that any agreed action points can be followed up with due diligence. You will then be asked to add your own comments to the form and to sign it to acknowledge that the various comments and action points contained therein have been discussed. If you are in substantial disagreement with the contents of the appraisal, you should record your viewpoint in the relevant section on the form.

Once the appraisal process has been completed, a copy of the completed appraisal form will be given to you for your own safekeeping and the original will be stored in confidence in your personnel file. The appraisal form (incorporating the action plan) must be viewed as a working document and should be continually referred to by both you and your line manager throughout the year.

If you feel that your appraisal was unfair you may make a request to ...................... *(insert name of contact)* for your appraisal to be reviewed. A more senior manager will conduct this review with both you and the relevant line manager.

for the year ending ...................... (insert date)

|  |
| --- |
| Name of employee: |
| Department and job title: |
| Date of appointment to current job: |
| Name of line manager completing the appraisal: |
| Date of next appraisal: |

This form is used to record the discussion that takes place between you and your line manager on an annual basis. It covers a summary of the previous year’s conduct and performance, both in terms of what has been achieved and how it has been achieved, and identifies what is required for the forthcoming year.

This form is in two parts. Part A should be completed by the line manager immediately after the appraisal session. Part B should then be completed by you. A copy of the completed form will be given to you and the original form will be placed on your personnel file.

The following performance levels are used in this form:

5 = Outstanding (consistently exceptional, performs far beyond the position requirements)

4 = Above expectations (usually performs beyond the position requirements)

3 = Meets expectations (consistently performs the position requirements)

2 = Needs improvement (improvement is needed to satisfy the position requirements)

1 = Unsatisfactory (falls far below the position requirements)

# PART A – FOR COMPLETION BY THE LINE MANAGER

Please summarise the nature of the work undertaken by the employee.

***Line manager’s assessment of the employee’s skills and knowledge.***

| Assessment of skills 5 4 3 2 1 N/A Comments |
| --- |
| Product knowledge |
| Quality and accuracy  of work |
| Written communication  skills |
| Verbal communication  skills |
| Work relationships |
| Productivity and  efficiency |
| Achievement of targets |
| Willingness to take on  responsibility |
| Ability to work without  supervision |
| Ability to perform  under pressure |
| Attendance record |
| Timekeeping record |
| Organisational skills |
| Client satisfaction |
| *(insert additional skills)* |

List achievements during last year (include courses attended, specific targets achieved and significant projects undertaken).

Line manager’s views on the employee’s overall performance and contribution to the Company in the previous year.

Agreed targets and performance objectives for the forthcoming year (the action plan).

Recommendations for training and career development in the coming year (including suggestions for alternative employment within the Company).

Any further comments by the employee’s line manager.

**PART B – FOR COMPLETION BY THE EMPLOYEE**

Are there any other jobs that you would like to do within the Company?

What are your work-related ambitions?

Please use this space to say how you felt about your appraisal session and any points you wish to make about the targets and performance objectives that have been agreed. If you disagree with your line manager’s assessment of your performance and conduct, please record your comments here.

Signed: .................................. . Signed: .................................. .

*(insert name of line manager) (insert name of employee)*

Date: ......................... Date: .........................