**Staff Appraisal**

Confidential

**The staff appraisal is to be completed by the employer during the meeting. In preparation for this meeting, the employee will have completed their self-appraisal form.**

Section 1

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| **Employee Name:** |  | **Job Title:** |  |
| **Department:** |  | **Line Manager:** |  |
| **Date of Appraisal:** |  | **Date of last appraisal:** |  |

Section 2 – Discussion of employee’s role

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| **Employee’s Role**  *Prior to the meeting, review your employees job description. As part of the self-appraisal your employee will be asked to state their understanding of their roles and responsibilities*  *Using their job description, discuss with your employee their roles and responsibilities.* |
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Section 3 – Looking Back

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| **Looking Back – Successes**  *What has been the employee’s most successful job achievements / accomplishments since the last appraisal? Were objectives listed over the last 12 months achieved?*  *Note: If this is the employee’s first appraisal, please review progress against the objectives set during the probationary review period and the key areas on the job description.* |
| **1.** |
| **2.** |
| **3.** |
| **4.** |

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| **Looking Back – Difficulties**  *What elements of the job has the employee found the most difficult over the last year?* |
| **1.** |
| **2.** |
| **3.** |
| **4.** |

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| **Looking Back – Training & personal development**  *Please note any training your employee has undertaken since the last appraisal including courses, conferences, skills programmes, mentoring, targeted experience in other areas of activity etc). Any training undertaken should be detailed on your employee’s individual training record, held on file.* |
| **Details (dates, provider, qualification, content etc)** |
| **How has this training and development/learning contributed towards their personal development?** |
| **How has this training and development/learning contributed towards their role?** |
| **Are there any other benefits that you can identify?** |

Section 4 – Assessment of current/performance skills

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| **Current Skills/Performance Review –** Review your employees core skills required to undertake their role. | | |
| **Skills / Performance** | **Comments** | **Further development identified?** |
| **Accountability / Integrity / Trustworthy / Commitment** | *e.g. Employee demonstrates trust to carry out work and I can reply on the person to do an accurate job.* |  |
| **Communication / Presentation Skills / Team Work** | *e.g. Employee presents and receives information both orally and in writing. They communicate and work well with other members of the team.* |  |
| **Quality & Quantity of Work** | *e.g. Employee meets standards, deadlines and work schedules. Produces and can manage acceptable quantity levels of work* |  |
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Section 5 – Looking Forward (12 months)

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| **Looking forward – Business objectives for the coming year.**  *Thinking of your business activities over the coming year what new skills are required? For example: legislation / compliance / new projects or contracts? Do you have any specific business objectives that need to be met?*  *These objectives must adhere to the SMARTER rules – specific, measurable, agreed, realistic, time-bound, ethical, recorded and are expected to go beyond day to day activities.* | | | |
| **Area of work development** | **Existing or new area?** | **Skills needed** |  |
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| **Looking forward – Personal Development Plan**  Review identified development needs in Section 4 above, along with business objectives in Section 5, to set an employee personal development plan.  Discuss and agree the training and development support to be given to help your employee achieve agreed objectives for the future. | | | | |
| **Skills development / needs identified** | **How does it meet business objectives?** | **How does it meet individual objectives?** | **Target date** | **Date to review** |
| ***Customer Service*** | ***Employee’s to deal with customer complaints rather than management*** | ***Builds confidence to deal with customer service*** | **September 2017** | **December 2017** |
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**Section 6 – Other matters**

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| **YOU EMPLOYEE & THE BUSINESS** |
| Are there any issues your employee wishes to raise regarding the business? This might include Policies & Procedures, Health & Safety, Working Environment and Work-Life Balance: |
| **ANY OTHER COMMENTS FROM THE EMPLOYEE (optional)** |
| This might include anything from their career aspirations to feedback on the appraisal process. |

Section 7 – Signatures

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| **Agreed as an accurate record**  Reviewee’s signature:  Line manager’s signature:  Date of review: |
| **Date to review objectives / training development set above:**  **Date of next appraisal:** |