**Staff Performance Evaluation and Appraisal**

Instructions for the Appraiser

**Prior to Appraisal**

* Provide employee with section 1 and section 2 at least two weeks prior to appraisal date.
* Explain the sections for the employee to complete and ensure they have a full understanding of what is required.
* Review and assess the work, competency, skills and overall performance of the employee for the last year or since the last appraisal.
* Collect or ensure sections 1 & 2 are returned completed by the employee by the deadline. This should be at least a few days prior to the appraisal.
* Go through section 1 making comments, notes on your assessment of the employee, on the accuracy of their self assessment and on the alignment of the employees assessment with the companies requirements and standards.
* Complete scoring of table in section 2 using your review and assessment.
* Use notes area in section 3 to detail specific skills/knowledge improvements required.
* In section 3, review, outline suitable training and development options available to improve these areas.

**During Appraisal**

* Describe the purpose of the employees job.
* Review together and discuss section 1 with employee during the appraisal comparing each of your notes and discussing any discrepancies.
* Review together the scoring (section 2) with employee and discuss and compare scores and note any issues raised.
* If necessary clarify job purpose, priorities and objectives.
* Discuss and agree the skills, capabilities and experience required for competence in current role, and if appropriate, for readiness to progress to the next role or roles.
* Discuss and agree the specific objectives that will enable the employee to reach competence and to meet required performance in current job.
* Review and discuss any issues/problems and agree on solutions.
* Review, discuss and agree the employees career direction options and choices.
* Discuss employees desire (and possibilities) for promotion or change of department or job.
* Discuss measures to achieve readiness for, the next job level if relevant.
* Discuss and agree training and development program for year ahead.

**Post Appraisal**

* Distribute copies to employee and appropriate departments.
* Ensure confidentiality of appraisal.
* Make arrangements for training and development agreed at the appraisal.
* Set a date for the next appraisal and ensure employee and appropriate personnel are informed.

**Staff Performance Evaluation and Appraisal Form**

|  |  |  |  |
| --- | --- | --- | --- |
| Company |  | Date of Appraisal |  |
| Name |  | Time of Appraisal |  |
| Department |  | Appraisal Venue |  |
| Job Title |  | Appraiser |  |
| Start Date |  | Self Appraisal Deadline |  |

**Section 1 – Self Assessment Appraisal**To be completed by the employee and returned to appraiser by ‘self appraisal deadline’ above.

|  |
| --- |
| 1.1 Briefly describe the duties and responsibilities of your job |
| *Appraiser’s Notes* |
| 1.2 How do you think you have performed in your job over the last year? |
| *Appraiser’s Notes* |
| 1.3 What have you achieved in the last year (or since your last assessment)? |
| *Appraiser’s Notes* |
| 1.4 What are your strengths and what skills have you improved? |
| *Appraiser’s Notes* |
| 1.5 What skills would you still like to improve? What are your weak areas? |
| *Appraiser’s Notes* |
| 1.6 What duties/responsibilities or aspects of your job do you most enjoy? |
| *Appraiser’s Notes* |
| 1.7 What duties/responsibilities or aspects of your job do you least enjoy or find most challenging/difficult |
| *Appraiser’s Notes* |
| 1.8 Do you dislike anything about your job and/or the company? |
| *Appraiser’s Notes* |
| 1.9 What do you like best about your job and/or the company? |
| *Appraiser’s Notes* |
| 1.10 What are you aiming to achieve in the next year? |
| *Appraiser’s Notes* |
| 1.11 What training and/or changes could improve your job, your development and your performance? |
| *Appraiser’s Notes* |
| 1.12 Where do you see yourself in five years? What aspirations do you have? |
| *Appraiser’s Notes* |
| 1.13 What key activities and tasks would you like to focus on during the next year |
| *Appraiser’s Notes* |
| 1.14 Are there any other work or personal related issues you wish to discuss? |
| *Appraiser’s Notes* |

**Section 2 – Skill Competency Assessment**

To be completed by the employee, then the appraiser prior to appraisal.

Score each item from 1 - 3

1 = Fails to meet expectations, 2 = Meets expectations, 3 = Exceeds expectations

|  |  |  |  |
| --- | --- | --- | --- |
| Skill/knowledge Area | Employee | Appraiser | Notes/Comparison |
| Commercial awareness |  |  |  |
| Job competency & knowledge |  |  |  |
| Company & product knowledge |  |  |  |
| Technical competency |  |  |  |
| IT skills |  |  |  |
| Administrative competency |  |  |  |
| Communication/interpersonal skills |  |  |  |
| Delegation & supervisory skills |  |  |  |
| Reporting skills |  |  |  |
| Time management |  |  |  |
| Achieving deadlines |  |  |  |
| Financial Budgeting |  |  |  |
| Planning, projections & forecasting |  |  |  |
| Accuracy of work |  |  |  |
| Speed of delivery of work |  |  |  |
| Decision-making |  |  |  |
| Issue resolving/Problem solving |  |  |  |
| Creative ideas |  |  |  |
| Team-work |  |  |  |
| Development and training of others |  |  |  |
| Working under pressure |  |  |  |
| Leadership skills |  |  |  |
| Flexibility and adaptability |  |  |  |
| Attitude |  |  |  |
| Personal presentation/ dress code |  |  |  |
| Time off for sickness etc |  |  |  |

|  |
| --- |
| Employee Overall Self Assessment Score: |
| Appraisers Overall Assessment Score: |

**Section 3. Training and Development**

|  |
| --- |
| Note those areas requiring further improvement, training or development: |

|  |
| --- |
| Options for training and development solutions/ideas: |

**Section 4. Recommendations**

To be completed by Appraiser

|  |
| --- |
| Overall recommendation for grade/salary increase/job competency/improvements: |

|  |
| --- |
| Training and Development recommendations: |

Employees signature: Appraisers signature:

....................................................................... ...................................................................

Date............................................................... Date...........................................................