

Performance Appraisal Scheme – Support staff Appraisal Form

The appraisal form is designed to provide a formal record of the expectations of performance over the next 6 to 12 months, with space to review progress and achievements during the year. Any identified development needs are also documented. Please make sure all discussions are recorded throughout the year eg when significant changes are being made to objectives. The form can be completed by the appraisee and passed to the line manager for review.

In appraisal meetings you need two appraisal forms:

- the one you have been working on throughout the year and
- a new blank appraisal form to agree and document new objectives for the year ahead

Section 1 Front page

| | | | |
|--------------------------------------|--|---------------------------------------|--|
| Name of Appraisee | | Job Title | |
| Dept or team (if appropriate) | | Date appointed to current post | |
| Name of Appraiser | | Relationship to Appraisee | |
| Reviewing Officer | | Relationship to Appraisee | |

| | Date | Appraiser initials | Appraisee initials | Reviewing Officer |
|---------------------------|-------------|---------------------------|---------------------------|--------------------------|
| Appraisal meeting | | | | |
| Progress reviews | | | | |
| End of year review | | | | |

Section 2 Agreed objectives for the year ahead ~ 20XX-20XX

It is important to make sure that these have a specific measure and a timescale rather than 'ongoing'. During the year, review objectives and record any which may have changed, been amended or completed.

| Objective No: | Objective, target, or outcome | Measures, timescales | Mid year/progress review (date/comments) | End of year achievement |
|----------------------|--------------------------------------|-----------------------------|---|--------------------------------|
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Please use continuation sheet if necessary.

Section 3 Personal Development Plan for the year ahead ~ 20XX-20XX

The **personal development plan** is a record of any development needed to support achievement of objectives or development of a competency area. During the year, review the learning which has taken place and record whether this has met the identified need.

| Learning & development need (please prioritise) | To support objective | How will this be achieved? | Timescale for development | Needs met/application of learning |
|--|-----------------------------|-----------------------------------|----------------------------------|--|
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Section 4 End of year summary of performance ~ 20XX-20XX

This is the **annual summary of performance** during the year 20XX-20XX, from both the appraisee and the manager.

This section should be completed at the end of the appraisal year.

- The summary should reflect key achievements and progress over the past 12 months.
- All aspects of performance should be taken into account such as overall attendance, improvement in competency areas, as well as achievement of objectives
- Record any particular challenges (for example reorganisation of team, availability of resources).
- Appraisee – identify any aspects of your career you would like to strengthen, along with aspirations for the future.

Section 5 Overall performance assessment ~ 20XX-20XX

This section should be completed at the end of the appraisal year.

Overall performance assessment of the appraisee:



- 4 Exceeding requirements of the job
- 3 Fully achieving all requirements of the job
- 2 Achieving some requirements of the job but improvement required
- 1 Not meeting job requirements – significant improvement required

Appraiser comments:

Signed

Date

Appraisee comments:

Signed

Date

Reviewing Officer comments:

Signed

Date

Continuation Sheet

Please use this sheet to continue with any text if you have filled the space provided in any of the above sections.

Appendix 1

| | Document Check Below are the documents required to be checked on an annual basis. | Date checked/attached |
|---|---|------------------------------|
| 1 | Current job description and person specification | |
| 2 | Driving Licence checked (if relevant) | |
| 3 | Work Station H&S Assessment (if relevant) | |
| 4 | Entitlement to work in the UK (if required) | |
| 5 | Car insurance Certificate - to include Business Use (if relevant) | |
| 6 | | |
| 7 | | |
| 8 | | |