

Employee Performance Appraisal/Assessment Form (Template)

| | | | |
|-------------------------|---------------------------|--------------------|--------------------|
| Org/Dept: | | Location/based at: | |
| Name: | Position: | | Ref: |
| Year or period covered: | Time in present position: | | Length of service: |
| Appraisal date & time: | Appraisal venue: | | Appraiser: |

Part A Appraisee to complete before the interview and return to the appraiser by (date)

A1 State your understanding of your main duties and responsibilities.

A2 Discussion points:

1. Has the past year been good/bad/satisfactory or otherwise for you, and why?

2. What do you consider to be your most important achievements of the past year?

3. What do you like and dislike about working for this organisation?

4. What elements of your job do you find most difficult?

5. What elements of your job interest you the most, and least?

6. What do you consider to be your most important aims and tasks in the next year?

7. What action could be taken to improve your performance in your current position by you, and your manager?

8. What kind of work or job would you like to be doing in 1-2 years' time?

9. What sort of training/experiences would benefit you in the next year? Not just job-skills - also your natural strengths and personal passions you'd like to develop - you and your work can benefit from these.

A3 List the objectives you set out to achieve in the past 12 months (or period covered by this appraisal)
Score your performance on each achievement, providing reasons where appropriate.

Objective

Measure/Standard

Score

Comment

Scoring system is as follows (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent)

A4 Score your own capability or knowledge in the following areas in terms of your current role requirements.
Scoring system is as follows (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent)

| | | | |
|---|--------------------------|--|--------------------------|
| 1. Commercial judgement | <input type="checkbox"/> | Others (for current or new role): 18. Corporate responsibility and ethics | <input type="checkbox"/> |
| 2. Product/technical knowledge | <input type="checkbox"/> | | <input type="checkbox"/> |
| 3. Time management | <input type="checkbox"/> | | <input type="checkbox"/> |
| 4. Planning, budgeting and forecasting | <input type="checkbox"/> | | <input type="checkbox"/> |
| 5. Reporting and administration | <input type="checkbox"/> | | <input type="checkbox"/> |
| 6. Communication skills | <input type="checkbox"/> | | <input type="checkbox"/> |
| 7. Delegation skills | <input type="checkbox"/> | | <input type="checkbox"/> |
| 8. IT/equipment/machinery skills | <input type="checkbox"/> | | <input type="checkbox"/> |
| 9. Meeting deadlines/commitments | <input type="checkbox"/> | | <input type="checkbox"/> |
| 10. Creativity | <input type="checkbox"/> | | <input type="checkbox"/> |
| 11. Problem-solving and decision-making | <input type="checkbox"/> | | <input type="checkbox"/> |
| 12. Team-working and developing others | <input type="checkbox"/> | | <input type="checkbox"/> |
| 13. Energy, determination and work-rate | <input type="checkbox"/> | | <input type="checkbox"/> |
| 14. Steadiness under pressure | <input type="checkbox"/> | | <input type="checkbox"/> |
| 15. Leadership and integrity | <input type="checkbox"/> | | <input type="checkbox"/> |
| 16. Adaptability, flexibility, and mobility | <input type="checkbox"/> | | <input type="checkbox"/> |
| 17. Personal appearance and image | <input type="checkbox"/> | | <input type="checkbox"/> |

Mark an X in those that are not relevant to your role

A5 Reflecting on your past performance, objectives met and future job aspirations/expectations what activities-tasks would you like to focus on during the next year.

Part B To be completed during the appraisal meeting by the appraiser/manager (certain items can be completed by the appraiser/manager before the appraisal, and then discussed and validated or amended in discussion with the appraisee during the meeting)

B1 Describe the purpose of the appraisee's/employees job. **Discuss and compare with self-appraisal entry in A1. Clarify job purpose and priorities where necessary.**

B2 Review the completed discussion points in A2, and note any actions to be taken.

B3 List the objectives that the appraisee set out to achieve in the past 12 months (or the period covered by this appraisal - typically these objectives will have been carried forward from the previous appraisal record) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate.

Score the performance against each objective (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent).

Compare with the self-appraisal in A3. Discuss and note points of significance, particularly training and development needs and wishes, which should be noted in B6.

| <u>Objective</u> | <u>Measure/Standard</u> | <u>Self-score/App'r score</u> | <u>Comment</u> |
|------------------|-------------------------|-------------------------------|----------------|
|------------------|-------------------------|-------------------------------|----------------|

B4 Score the appraisee's capability or knowledge in the following areas in terms of their current (and if applicable, next) role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate provide evidence to support your assessment. The second section can be used for other criteria or if the appraisee is working towards new role requirements. **Compare scores with the self-appraisal in B4. Discuss and note agreed points training/development needs and wishes (to B6).**

| | | | | | |
|---|--|--|---|--|--|
| 1. Commercial judgement | | | Others (for current or new role): | | |
| 2. Product/technical knowledge | | | 18. Corporate responsibility and ethics | | |
| 3. Time management | | | | | |
| 4. Planning, budgeting and forecasting | | | | | |
| 5. Reporting and administration | | | | | |
| 6. Communication skills | | | | | |
| 7. Delegation skills | | | | | |
| 8. IT/equipment/machinery skills | | | | | |
| 9. Meeting deadlines/commitments | | | | | |
| 10. Creativity | | | | | |
| 11. Problem-solving and decision-making | | | | | |
| 12. Team-working and developing others | | | | | |
| 13. Energy, determination and work-rate | | | | | |
| 14. Steadiness under pressure | | | | | |
| 15. Leadership and integrity | | | | | |
| 16. Adaptability, flexibility, and mobility | | | | | |
| 17. Personal appearance and image | | | | | |

B5 Discuss and agree the appraisee's career direction options and wishes, and readiness for promotion, **and compare with and discuss the self-appraisal entry in A5.** (Some people do not wish for promotion, but everyone is capable of, and generally benefits from, personal development - development and growth should be available to all, not just people seeking promotion). **Note the agreed development aim(s):**

B6 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. **Refer to actions arising from B3 and the skill-set in B4, in order to accurately identify all development areas, whether for competence at current level or readiness to progress to next job level/type.) Note the agreed development areas:**

B7 Discuss and agree the specific objectives that will enable the **appraisee to reach competence and to meet required performance in current job**, if appropriate taking account of the coming year's plans, budgets, targets etc., and that will enable the appraisee **to move towards, or achieve readiness for, the next job level/type, or if no particular next role is identified or sought, to achieve the desired personal growth or experience.** These objectives must adhere to the SMARTER rules - specific, measurable, agreed, realistic, time-bound, ethical, recorded.

B8 Discuss and agree (as far as is possible, given budgetary, availability and authorisation considerations) the training and development support to be given to help the appraisee meet the agreed objectives above.

Grade/recommendation/summary as applicable:

Personal development and support must be offered to all employees, irrespective of age, gender, race, disability, etc., and not just to those seeking promotion. Development is not restricted to job skills - it includes 'whole person'. Use your imagination. Job skills training isn't restricted to courses. Think about coaching, mentoring (by and of the appraisee), secondment to another role, holiday job cover, shadowing, distance-learning, e-learning, books, videos, attending meetings and workshops, workbooks, manuals and guides, researching, giving presentations; anything relevant, helpful and agreed to help the person develop. Avoid committing to training expenditure before suitable approval or availability has been confirmed. Understand development options and procedures before conducting the appraisal. Develop the whole person.

B9 Other issues (to be covered separately outside of this appraisal - continue on a separate sheet if necessary):

Signed and dated by appraisee:

and by appraiser:

Distribution of copies/confidentiality/accessibility details: