Appraisals: The Essentials Guide

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What we will cover

- The benefits of carrying out reviews
- How to conduct an effective review
- How to devise objectives
- The need for appropriate forms and documentation

Performance appraisal

Definition….

"…the assessment of an employee's performance, potential and development needs."

Why have a review process

- To match the organisation and employees' needs. With tight budgets, this is a chance to reinforce our business needs and how the employee can meet them.
- To review achievements during the last review period – it might have been a challenging time for them, and this is a good chance to take stock.
- To bring in constructive measure to improve any weaknesses
- To agree objectives for the next review period.

The benefits of an effective review system.

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How to get the most out of the review

- Both the employee and manager should prepare for the meeting by thinking carefully about the review period.
- Enough time should be allocated to allow for a meaningful discussion.
- Keeping the discussion constructive.
- Only make commitments that can actually by followed through.
- Prioritise the review rather than pushing it back for other things
- Agree a plan for the next review period and how it will be monitored.
- Identify what success looks like – how will the employee know if they are doing well.

How often?

Annually

This is normally the formal review meeting

Periodically

This is the periodic review of objectives – usually a formal meeting to ensure objectives are being met. Can agree to provide further assistance if necessary and can also agree to modify objectives if requires.

Continuously

Regular informal meetings/conversations to endure that objectives are on track and to check whether the employee needs further help/training/guidance

The review itself

Preparation

- Review the preceding period against any objectives that have previously been arranged.

Holding the review

- Establish an informal, unhurried atmosphere.
- Listen
- Give time to talk
- Discuss, praise and encourage
- Focus on performance, not personality
- Approach difficult issues head on

Setting objectives

- Agree a plan of action

Documentation

- Complete paperwork and agree the outcomes

Objectives

Specific

Measurable

Achievable

Realistic

Time

- Objectives are not just tasks, they are specific outcomes
- Objectives should always be agreed jointly to secure motivation and commitment.
- Agree how and when they will be measured
- Review objectives on an on-going basis to identify whether the individual requires extra help/training.

What to record

- General comments

How has the last year gone? What has gone well, and what could have been improved?

- Review of performance since last appraisal

Look at the key targets from the last review, have they been met and how were they met?

- DEI

How have you they contributed to our DEI work. Any specific contributions to our DEI strategy and action plan? Look at what support can be offered for the next year.

- Feedback on manager and employee performance.

A space for both parties to provide constructive feedback.

- Targets for the next year

Remember to try and keep these SMART.

- Development needs and career progression

What are the longer-term needs. Remember to consider the opportunities both within and outside the organisation.

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