

Employee Appraisal Techniques - Guidance

Why undertake employee appraisal?

By reviewing performance and job progress, employees are able to prioritise, improve work planning and establish personal development and career plans. This should lead to improved working arrangements, increased job satisfaction, and appropriate employees training. Appraisal is therefore a continuous process, which also links to line management/supervision.

Objectives of Appraisal

- a) to review performance and progress within a twelve-month period on an annual basis against set objectives.
- b) to discuss improvements required, and how to achieve them
- c) to agree and set objectives, key performance indicators and personal development plan for the forthcoming twelve months in relation to the business plan
- d) to discuss specific working arrangements and make any necessary changes to enable employees to do their jobs more effectively
- e) to assess training and development needs to enable a positive contribution to future performance.
- f) to recognise team and personal achievements
- g) to increase employee's motivation and improve communication among staff

The Process

- a) Set a date, time and venue to include a time limit.
- b) The job description should be included and considered, also line management notes need to be considered. (If appropriate, changes or amendments to job description after appraisal to be discussed by management committee following process to change)
- c) For the meeting, ensure comfortable surroundings, free from interruptions and distractions.

Employee Appraisal

The Appraiser (line manager) should consider the following:

- a) What are the employee's main tasks and responsibilities?
- b) What evidence do I have to support my view of the employee's performance?
- c) What obstacles or problems may have hindered the employee and how might I be able to help in the future?
- d) Have I organised the work of employees in a logical and effective manner?
- e) What are the main objectives I wish to set for the future in relation to the business plan?
- f) Can I prioritise the objectives to assist in focussing efforts?

- g) What action and support is required to enable these objectives to be achieved within the agreed time scale?

Self-Appraisal (employee)

To ensure that these discussions are two-way, it is suggested that employees carry out their own review of their performance in the previous twelve months using the following areas as a guide:

- a) Do you feel your job description is relevant?
- B) Which objectives have you met/not met and why?
- b) Which aspects of your work do you feel especially pleased with?
- c) Which aspects of your job have not gone as well as you would have hoped?
- d) Are there any constraints or difficulties you are working under?
- e) In what ways would you hope to develop your experience and strengthen expertise both in the coming year and in the long term?

Employee Annual Appraisal - Model

Name of Company:.....

DATE:.....

ANNUAL APPRAISAL

NAME:.....

Name of company recognises that its staff are its most important and valuable resource. The success of *Name of company* depends on the effort and work of those staff.

Since day-to-day work is busy, this annual appraisal is a way of ensuring that time is given, on an individual basis, to discuss any aspect of work, training needs, and personal development. It is also an opportunity to identify organisational or operational changes, for the benefit of all.

In order to achieve these aims it is important that appraisal takes place in a positive and supportive spirit which recognises good practice and acknowledges contributions individuals have made in the course of their work.

1. Review performance against set objectives and personal development plan
2. Identification of the most important tasks in your work:
3. Factors which limit you in your work, or cause problems to you:
4. Suggested improvements in practices:
5. Personal Training Record reviewed, including any training undertaken, training needs identified or qualifications sought:
6. Objectives for the forthcoming year in relation to the business plan:
7. Consideration of Health and Safety – concerns / suggested improvements:
8. Any other items for discussion:

Signed:

Director

Please note: the conversation during this meeting, and in particular, any issue relating to personal circumstances, is confidential.