Staff Appraisal Template

[usage guide](http://www.businessballs.com/performanceappraisals.htm)

ref:

name:

org/division/dept:

position:

location/based at:

appraiser:

appraisal venue:

appraisal date & time:

year or period covered:

time in present position:

length of service:

**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:**

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

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

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

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

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

**A3** List the objectives you set out to achieve in the past 12 months (or the period covered by this appraisal) 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):

**objective measure/standard score comment**

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.

8. What kind of work or job would you like to be doing in one/two/five years time?

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

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

others (for current or new role):

18. corporate responsibility and ethics

1. commercial judgement
2. product/technical knowledge
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

**A4** Score your own capability or knowledge in the following areas in terms of your current role requirements (1-3 = poor, 4-6 = satisfactory, 7-9 = good, 10 = excellent). If appropriate bring evidence with you to the appraisal to support your assessment. The second section can be used if working towards new role requirements.

**Part B** To be completed during the appraisal by the appraiser - where appropriate and safe to do so, certain items can completed by the appraiser before the appraisal, and then discussed and validated or amended in discussion with the appraisee during the appraisal.

**A5** In light of your current capabilities, your performance against past objectives, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year. Again, also think of development and experiences outside of job skills - related to personal aims, fulfilment, passions.

**B2 Review the completed discussion points in A2, and note the points of and action**.

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

**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.**

**objective measure/standard self-score/app'r score comment**

**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).**

others (for current or new role):

18. corporate responsibility and ethics

1. commercial judgement
2. product/technical knowledge
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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):**

**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.

**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:**

Grade/recommendation/summary as applicable:

Signed and dated by appraisee: and by appraiser:

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

Refer to the [guidance notes](http://www.businessballs.com/performanceappraisals.htm). 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.

**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.

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