



## **PAVS' Staff Appraisal Procedure**

### **CONFIDENTIAL - Pre-meeting Post-Holder's (Appraisee) checklist**

A completed copy of this form must be passed to the Appraiser two days before the appraisal meeting

Completed form will be stored in confidence on the post-holder's appraisal file

This checklist is to help you plan your appraisal meeting. Complete the form and use the checklist as an agenda for the meeting. You may need to refer to other papers to fill in this checklist and also during the meeting, such as your job description and the work programme.

The checklist is confidential to you and your appraiser. It may also be seen by a third party if needed.

Your name:

Job title:

Location and date of the appraisal meeting:

#### **Your job –**

1. What is the overall purpose of your job and what are your main job responsibilities?
  
2. In what ways has your job changed since the last appraisal session?
  
3. What is it about your job that you  
a. a) Like? b) Dislike?
  
4. What style or way of working do you prefer?
  
5. What changes in your job would you like to make?

#### **Your skills –**

6. What are the main skills your need to do your job?
  
7. What additional skills or knowledge would you find useful in carrying out your job?

8. What skills or knowledge do you have that are not used in your present job but you would wish to apply in the organisation?

**Your performance –**

9. What aspects of your performance are you satisfied with and want to continue?

10. What aspects of your performance are you dissatisfied with and want to improve?

**The Association's performance –**

11. What aspects of the way the organisation works have helped or hindered you in your job (systems, procedures, culture, etc)?

12. What aspects of your line manager's performance are you satisfied with and want to see continued?

13. What aspects of your line manager's performance are you dissatisfied with and want to see improved?



**The job holder's skills**

6. What are the main skills the post holder needs to do the job?
  
  
  
  
  
  
  
  
  
  
7. What additional skills or knowledge would the post holder find useful in carrying out the job?
  
  
  
  
  
  
  
  
  
  
8. What skills or knowledge do you think the post holder has that are not used in the present job, but could be applied in the Association?

**The job-holder's performance**

9. What aspects of performance are you satisfied with and want to continue?
  
  
  
  
  
  
  
  
  
  
10. What aspects of performance are you dissatisfied with and want to improve?

**The Association's performance**

11. What aspects of the way the organisation works have helped or hindered the post holder in the job (systems, procedures, culture, etc)?
  
  
  
  
  
  
  
  
  
  
12. What aspects of your performance in regard to the post holder are you pleased about and want to see continued?
  
  
  
  
  
  
  
  
  
  
13. What aspects of your performance are you disappointed with and want to see improved?



**PAVS' Staff Appraisal Procedure**

**CONFIDENTIAL - Appraisal Summary Sheet**

Completed form will be stored in confidence on the post-holder's appraisal file

**Appraiser's summary of the session**

**Post holder's summary of the session**

**Appraisal summary**

Appraiser's signature ..... Date .....

Post holder's signature ..... Date .....

**Third party involvement**

If agreement cannot be reached, a third party can be asked to facilitate a further meeting to assist you to find a way forward. Please indicate whether this is required.

Yes

No

**(If yes above) confirmation of appraisal process outcomes**

Post holder's line manager (or appraiser's line manager if appropriate) review of completed form

Signature ..... Date .....

When completed, this form should be copied to the post holder, the appraiser and the line manager within 10 days (and be kept confidential).



## PAVS' Staff Appraisal Procedure

### Career and personal development plan

Original form to be placed in staff member's portfolio. Copy to Staff Development File.

Name:

Job title:

Date:

#### **Training/development needs**

(Skills, knowledge, awareness, etc)

#### **Possible ways of meeting those needs**

(Job development, special projects, coaching, training, job shadowing, etc)

#### **Action Plan**

Who will do what, and by when?

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#### **Skills inventory**

Skills or knowledge not used in the present post, but which could be of use to others in the Association



## PAVS' Staff Appraisal Procedure

**CONFIDENTIAL** - Development objectives

Completed form will be stored in confidence on the post-holder's appraisal file

Name:

Job title:

Date:

Specific action, such as new work programme objectives, action by the Association to change policy, action by the post holder's line manager on how they will behave in future, and so on may be agreed at an appraisal meeting and will need to be recorded. This list of objectives can be attached to the summary sheet as part of the record of agreement reached.

(Objectives should be **SMART** in the way they are written – **S**pecific, **M**easurable, **A**greed, **R**ealistic and **T**imescaled)

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(Attach this form to the Appraisal summary sheet – refer to it at regular intervals to monitor progress and to identify new objectives and action)



## PAVS' Staff Appraisal Procedure

### Appraisal Scheme Review Questionnaire

This form will be stored centrally and the information will be used to review the appraisal scheme

Name:

Job Title:

#### 1. Objectives –

1.1 What do you personally feel are the objectives of the scheme (tick any/all boxes you think apply, and add any other objectives you think are relevant) –

- To agree training needs
- To review job performance during previous calendar year
- To discuss future career developments
- To set performance related objectives for the following year

1.2 Do you feel the objectives of the appraisal scheme were met?

Yes  No  Partly

1.3 If the answer is 'no' or 'partly', in what way(s) were they not met?

#### 2. Timing and frequency –

2.1 Should the reviews be held as now?   
or at some other time of the year?   
If at some other time – when? .....

2.2 Should a formal review be held –  
Every 6 months?   
Every 12 months?   
Less frequently?

#### 3. Appraiser preparation and style

3.1 To what extent did you feel the appraiser

a) understood your job, competence, achievements and aspirations?

Fully  Partly  Not at all

b) gave you the opportunity to share your views and ideas, and listened to them effectively?

Fully  Partly  Not at all

c) ensured that at the end of the interview both of you knew exactly what action has been agreed?

Fully  Partly  Not at all

3.2 Did any of the appraiser's comments come to you as a surprise?

Yes  No  (If 'yes', please give examples):

### 5. Career development

5.1 Do you feel the appraisal system is an adequate vehicle for determining career progression and development needs?

Yes  No

5.2 If 'no', please give reasons

### 6. Form Design

6.1 Is the general design and layout of appraisal forms acceptable to you?

Yes  No

6.2 If 'no', please elaborate

### 7. General comments

What other comments, if any, do you have regarding the improvement/acceptability of the process in general?