Employee Performance Appraisal/Assessment Form (Template)

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| Department: |  | Location/based at: |  | Year or period covered: |  |
| Name: |  | Position: |  | Length of service: |  |
| Appraiser: |  | Appraisal venue: |  | Time in present position: |  |

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| **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 |

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| 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. |

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| **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.  **Scoring system is as follows** (1= poor, 2 = satisfactory, 3 = good, 4 = excellent)  **Objective Measure/Standard Score Comment** |

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| **A4**  Score your own capability or knowledge in the following areas in terms of your current role requirements.  Scoring system is as follows:  1= poor / 2 = satisfactory / 3 = good / 4 = excellent / X = not applicable |

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| 1. Commercial judgement |  | 10. Creativity |  |
| 1. Product/technical knowledge |  | 11. Problem-solving |  |
| 1. Time management |  | 12. Team-working |  |
| 1. Planning, budgeting and forecasting |  | 13. Decision Making |  |
| 1. Reporting and administration |  | 14. Leadership |  |
| 1. Communication skills |  | 15. Integrity |  |
| 1. Delegation skills |  | 16. Flexibility |  |
| 1. IT equipment/machinery skills |  | 17. Corporate responsibility |  |
| 1. Meeting deadlines/commitments |  | 18. Work rate |  |

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| **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 completed by the appraiser/manager before the appraisal, and then discussed and validated or amended in discussion with the employee during the meeting)

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| **B1**  Describe the purpose of the employees’ job.  **Discuss and compare with self-appraisal entry in A1. Clarify job purpose and priorities where necessary.** |

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

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| **B3**  List the objectives that the employee set out to achieve in the past 12 months (or relevant period) with the measures or standards agreed - against each comment on achievement or otherwise, with reasons where appropriate.  Score the performance against each objective (1= poor / 2 = satisfactory / 3 = good / 4 = 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 Score Comment** |

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| **B4**  Score the employee’s capability or knowledge in the following areas in terms of their current role requirements (1= poor / 2 = satisfactory / 3 = good / 4 = excellent / X = not applicable  If appropriate provide evidence to support your assessment.  Compare scores with the self-appraisal in A4. Discuss and note agreed points training/development needs and wishes (to B6). |

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| 1. Commercial judgement |  |  | 10. Creativity |  |  |
| 1. Product/technical knowledge |  |  | 11. Problem-solving |  |  |
| 1. Time management |  |  | 12. Team-working |  |  |
| 1. Planning, budgeting and forecasting |  |  | 13. Decision Making |  |  |
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| 1. Meeting deadlines/commitments |  |  | 18. Work rate |  |  |

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| Comments: |

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| **B5**  Discuss and agree the employee 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 agreed development goals:** |

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| **B6**  Discuss and agree the skills, capabilities and experience required for competence in current role, and development opportunities.  Refer to B3 and B4, in order to accurately identify all development areas  Note the agreed development areas: |
| **B7**  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 employee meet the agreed objectives above.  **For Manager**  Personal development and support must be offered to all employees,  Development is not restricted to job skills.  Job skills’ training isn’t restricted to courses - consider coaching, mentoring (, 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.  Avoid committing to training expenditure before suitable approval or availability has been confirmed. |

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| **Agreed Actions:**  Action \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Action \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Action \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Action \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Person Responsible \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  Due Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| **B9** Other issues to be covered separately outside of this appraisal |

Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Employee

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signed \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Manager

Date \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_