

Appraisal Process/Performance Development Plan

Purpose

- Aim is to identify weaknesses and strengths as well as opportunities for improvement and development
- Key to process – evaluation system (identify the performance gap, if any. This gap is the shortfall that occurs when performance does not meet the standard set by the organisation as acceptable)and feedback system (informing the employee about the quality of his performance, also an opportunity for employees to give feedback)
- Employee viewpoint – tell me what you want me to do; tell me how well I have done it; help me to improve my performance; reward me for doing well
- Organisational viewpoint – principle of accountability; alignment of responsibility and accountability
- Remember to encourage discussion; constructive intention (important for employees to recognise that negative appraisal feedback is provided with a constructive intention to help them overcome present difficulties and to improve their future performance)
- Set performance goals – employee motivation – stimulates effort, focuses attention, increases persistence, encourages new ways of working

Benefits

- Motivation and satisfaction; training and development; recruitment and induction; employee evaluation

Appraisal Meeting

- Discuss and agree upon the objective of the meeting, to create a performance development plan
- The staff member discusses the achievements and progress he has accomplished during the quarter
- The staff member identifies ways in which he would like to further develop his professional performance, including training, assignments, new challenges and so on
- The supervisor discusses performance for the quarter and suggests ways in which the staff member might further develop his performance
- Add the supervisor's thoughts to the employee's selected areas of development and improvement
- Discuss areas of agreement and disagreement, and reach consensus
- Examine job responsibilities for the coming quarter and in general
- Agree upon standards for performance for the key job responsibilities
- Set goals for the quarter
- Discuss how the goals support the accomplishment of the organization's business plan, the department's objectives and so on
- Agree upon a measurement for each goal
- Assuming performance is satisfactory, establish a development plan with the staff person, that helps him grow professionally in ways important to him
- If performance is less than satisfactory, develop a written performance improvement plan, and schedule more frequent feedback meetings

- Remind the employee of the consequences connected with continued poor performance
- The supervisor and employee discuss employee feedback and constructive suggestions for the supervisor and the department
- Discuss anything else the supervisor or employee would like to discuss, hopefully, maintaining the positive and constructive environment established thus far, during the meeting
- Mutually sign the performance development tool to indicate the discussion has taken place
- End the meeting in a positive and supportive manner. The supervisor expresses confidence that the employee can accomplish the plan and that the supervisor is available for support and assistance
- Set a time-frame for formal follow up, generally quarterly

Following the Performance Development Process Meeting

- If a performance improvement plan was necessary, follow up at the designated times
- Follow up with performance feedback and discussions regularly throughout the quarter. (An employee should never be surprised about the content of feedback at the performance development meeting)
- The supervisor needs to keep commitments relative to the agreed upon development plan, including time needed away from the job, payment for courses, agreed upon work assignments and so on
- The supervisor needs to act upon the feedback from departmental members and let staff members know what has changed, based upon their feedback
- Forward appropriate documentation to the Human Resources office and retain a copy of the plan for easy access and referral