

Appraisal and Performance Development Plan

Name:	Position:
Length of employment: years months	Time since previous appraisal:
Reviewer:	Position:
Total number of absences in previous 12 months:	

The primary aim of this process is to evaluate your performance (including strengths and areas for development) in a constructive manner. Another objective is to consider your achievements and how to enable you to develop professionally in the next 12 months.

There are three main parts to this process:

1. **Competency Based Review Questions** - In the Person Specification for your role as a XXX there are a number of competencies which we would expect you to demonstrate in your day to day work performance. ...
2. **Position Specific Performance Review Questions** - This section is based on your Job Description and provides a further opportunity for you and your reviewer to discuss these areas of your job...
3. **Performance Development Review** – this section reviews your performance overall and how to build upon your current performance including review of previously set action plans and goals, and training and development.

Competency Based Review Questions

In the Person Specification for your role as XXX there are a number of competencies which we would expect you to demonstrate in your day to day work performance, these are:

Listening	Verbal Communication	Written Communication	General Problem Solving	Team Work
Time Management	Networking	Future Orientation	Delegation	Diplomacy
Conscientiousness				

To see examples of good and poor performance for these specific competencies, refer to the attached competency document.

In the table below you and your reviewer are asked to:

- Give a rating on your current performance (please use the rating scale below when considering your response to each statement)
- Please give examples in the comment box
- If further development is needed, please place a tick in the 'action' box. This will be considered later in the 'Action Planning and Goal Setting' section

Rating Scale:

5 – Exceptional	4 – Above Average	3 – Average	2 – Below Average	1 - Unsatisfactory
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Competency Based Review Statements	Manager	Employee	Comment	Action
Listening – the ability to pick out important information in oral				

communication. Questioning and general reactions indicate active listening.				
Verbal Communication – is a clear, effective speaker and can express one's point of view with clarity and succinctness.				

SAMPLE

Position Specific Performance Review Questions

The following questions have been prepared based on your job description.

In the table below you and your reviewer are asked to:

- Give a rating on your current performance (please use the rating scale below when considering your response to each statement)

Rating Scale:

5 – Exceptional	4 – Above Average	3 – Average	2 – Below Average	1 - Un satisfactory
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Key Position Requirements Review Statements	Manager	Employee	Comment	Action
Every day, as per client requirements, oversee and be responsible for all designated client activities, ensuring both internal and external parties are kept well informed of progress				
Ensure that the business financials including monthly invoicing and revenue forecasts are accurate and completed on time				

Performance Development Review

As well as considering your current competencies in relation to your role, it is important to consider how to build upon your current performance. Here you are given the opportunity to record and/or discuss with your reviewer how you feel you have performed in the previous twelve months and how you would like to develop further within the organisation.

- Please record your comments in relation the questions
- If further development is needed, please place a tick in the 'action 'box. This will be considered later in the 'Action and Goal Planning' section

Performance Review Questions	Employee Comment	Reviewer Feedback	Action
What do you like most about your role?			
What do you like least about your role?			
What do you feel your major achievements have been in the last 12 months?			

Upward Appraisal

Pod Consulting encourages your feedback in relation to management, your team, work station and the organisation. Please complete the Upward Appraisal form as honestly as possible. Please tick the applicable boxes in the following tables.

Your Manager	Strongly Agree	Agree	Slightly Agree	Neutral	Slightly Disagree	Disagree	Strongly Disagree
Is interested and acts on my suggestions and/or ideas for improvement							

Your Team	Strongly Agree	Agree	Slightly Agree	Neutral	Slightly Disagree	Disagree	Strongly Disagree
My team works well together							

Action Plan and Goal Review

It is important when action planning and goal setting to consider any previously established objectives and their completion success.

The table below (if appropriate) shows *Previous Actions and Goals* set at your previous appraisal and the agreed dates for completion.

- Please ensure details are complete and please complete the *Previous Actions and Goals Review Questions*

Previous Actions and Goals	Date Agreed for Completion	Date Achieved

Previous Actions and Goals Review Questions	Employee Comment	Reviewer Feedback	Action
Have you achieved all of the actions that were set out in your previous appraisal?			

Training and Skill Development Review

In order to achieve your actions and goals, consider the training you have recently undertaken and any training which may be beneficial in the future.

Training Review Questions	Employee Comment	Reviewer Feedback	Action Required?

SAMPLE

Action Planning and Goal Setting

The following table requires you and your reviewer to identify specific actions and goals with the objective of performance improvement.

- Check back to the previous tables to see which questions resulted in a required 'action' and incorporate these into the table below

Action/Goal	Possible Obstacles	SMART? Yes/No	Date for Completion