



QF203A	PERFORMANCE APPRAISAL
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The performance appraisal is designed to provide a time and opportunity to look back over our performance during the past and realistically plan for the future. An essential goal of the performance appraisal meeting is that both you and your Manager know clearly what you expect of each other and feel strongly that you can achieve your objectives by working together.

PRIVATE AND CONFIDENTIAL

EMPLOYEE'S DETAILS

Name: _____

Position: _____

Years/months employed in this position: _____

Date of review: _____ Date of next review: _____

Manager Name: _____

Manager Position Title: _____

Self-Appraisal

The self-appraisal provides you with the opportunity to contribute significantly to improving both your own performance and your working relationship with your Manager. This section encourages you to be proud of your accomplishments and honest about your areas of improvement. The following questions are intended to help you organise your thoughts and prepare for your appraisal, allowing you to share your thoughts during your performance appraisal.

Instructions for completing this section:

- Employees should complete this section prior to their annual performance meeting.
- You should respond to each of the questions completely and accurately.
- Once complete please return a copy to your Manager for review.

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1. DESCRIBE YOUR MOST SIGNIFICANT ACCOMPLISHMENT IN THIS LAST YEAR

2. DESCRIBE ANY BARRIERS OR CHALLENGES THAT IMPACT YOU IN EFFECTIVELY COMPLETING YOUR JOB RESPONSIBILITIES OR ACCOMPLISHING YOUR GOALS.

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3. PLEASE LIST YOUR AREA (S) OF STRENGTH AND AREA (S) OF IMPROVEMENT.

4. WHAT SKILLS OR NEW KNOWLEDGE WOULD YOU LIKE TO DEVELOP TO IMPROVE YOUR PERFORMANCE?

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5. PLEASE READ AND REVIEW YOUR JOB DESCRIPTION. DO YOU THINK IT REFLECTS YOUR CURRENT ROLE AND DUTIES? IF NOT, PLEASE PROVIDE YOUR COMMENTS BELOW.

6. IS THERE ANY OTHER INFORMATION YOU WOULD LIKE TO SHARE WITH YOUR MANAGER REGARDING YOUR WORK PERFORMANCE?

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7. DO YOU ANY PLANS FOR LEAVE THAT IN THER NEXT YEAR THAT WE SHOULD BE AWARE OF?

Staff Performance Appraisal Section

The performance appraisal process is designed to evaluate an employee's performance over a specified period of time. When the process works well, the employee and his/her manager plan together to build on strengths and develop those areas needing improvement. During the performance appraisal session, time is set aside to:

1. Restate the expectations about job and person specifications.
2. Evaluate job performance against previous expectations.
3. Discuss future development opportunities and relate them to organisational requirements

Manager

In evaluating an employee's performance, you are to identify strengths and areas of performance which require improvement. You are asked to provide examples of the employee's performance to illustrate the ratings you give. Examples based on your own observations work best. However, second hand observations are permissible if you have verified the information. Such examples clarify your message. After the meeting, follow up on the development plans mutually established by you and the employee.

Employees

The more involved you are in the performance appraisal meeting, the more effective the process is likely to be. Be prepared by completing the self- appraisal form.

Instructions

The performance appraisal process should include the following steps:

1. Obtain and review self-appraisal from employee
2. Complete Employee Performance Appraisal form for employee*
3. Schedule meeting to discuss the appraisal
4. Conduct performance appraisal meeting
5. Provide copy of signed Employee Performance Appraisal to employee
6. Place signed Employee Performance Appraisal in the employee's personnel file
7. If applicable, schedule meeting to discuss work performance improvement plan

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Managers comments on staff self appraisal

PROGRESS TOWARDS GOALS IDENTIFIED IN LAST PERFORMANCE REVIEW (IF APPLICABLE)

Goal	Action taken	Completed?	Comments

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Task description (taken from job and person specification)	Unsatisfactory	Development	Good	Excellent	Comments

NOTE:

Unsatisfactory: Needs further support and further review. Task to be added to action plan with clear expectations and completion date this will need to be corrected within a 12-week period.

Development: Area for development 12-month time frame to work on improvement to be added to action plan for next annual review.

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GENERAL COMMENTS ABOUT THE EMPLOYEE'S PERFORMANCE

ACTION PLAN – GOALS FOR REVIEW

Goal	Action required	Date for completion

ADDITIONAL INFORMATION ABOUT THE ACTION PLAN/GOALS FOR NEXT REVIEW PERIOD

ACTION PLAN REVIEW DATES

Date	Required Action	Comments

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ACKNOWLEDGEMENT OF PERFORMANCE APPRAISAL

Manager's signature: _____

Employee's signature: _____

Signatures indicate that everyone who participated in this review has agreed that information and comments written here were a true and accurate reflection of the performance appraisal meeting.