[Company Name / Logo]

Employee Performance Review

Procedure

The face-to-face discussion must be open and participative. Employees must not be inhibited and managers must not react adversely, otherwise the discussion will not achieve its objective. Good listening skills are key to the reviews.

The following are guidelines for undertaking the review:

* Give at least one week’s notice to the employee.
* Provide the employee with a copy of the preparation documents so that they have time to prepare and think about the questions and actions in advance of the meeting. This includes a copy of the previous objectives.
* Ensure the employee has a copy of their job description, plus a copy of any company strategy and objectives.
* Provide an area to undertake this, without interruption.
* Allow up to an hour.
* Put the employee at ease by beginning with fairly routine, casual remarks.
* Explain the purpose and scope of the discussion.
* Use the job description as an aid to the discussion – the job description is an integral aid to the success of the appraisal as it focuses on performance, agreed targets and objectives avoiding character assessment.
* Ensure that 20% of the discussion looks back, with 80% looking forward.
* Follow the basic questions detailed which drive the review.
* To avoid misunderstandings, always reconfirm individual points and issues.
* The review must conclude with a brief summary to avoid any misconceptions and with the employee having a clear idea of what has been agreed.
* Both manager and employee must sign and date the record of the discussion.
* If an agreement cannot be reached, the matter should be referred up to the next level of management to ensure a satisfactory conclusion.
* Two copies are required, one for the employee and one for their personnel file.
* Managers must maintain the relationships formed at these discussions – this will mean following up on key tasks outlined and the performance following the review, keeping notes and ensuring that the agreed actions on both sides are implemented.
* The appraiser should record any views or opinions which have not been agreed by the employee to their satisfaction.

Precisely identify the skills or knowledge gaps but do not agree to specific training at this time. Training should not always be seen as being provided by external means, focused on-the-job training is equally, if not more, beneficial to the employee. However, fix a time by which a response will be given.

**NOTE:** While disciplinary action must not form part of this system, as it would damage its objectivity, evidence from the review may be used during any formal disciplinary action.

Performance and Development Review

The Performance and Development Review provides an opportunity to formally pull together and summarise achievements during a specified period and to agree a plan of action for the forthcoming period.

It will give you the opportunity to tell your manager how you feel about your job, gain an understanding of how your manager sees your performance, discuss areas where training or other assistance can be of benefit and gain an understanding of what is expected of you by discussing and agreeing objectives for the future.

A copy of this review will be made for you to keep.

Personal Details

|  |  |  |  |
| --- | --- | --- | --- |
| Name: |  | | |
| **Position:** |  | | |
| **Line manager’s name:** |  | | |
| **This review date:** | \_ \_ / \_ \_ / \_ \_ | **Date of last review:** | \_ \_ / \_ \_ / \_ \_ |

Discussion and Feedback Section

|  |
| --- |
| **Do you have a clear job description and do you believe this is relevant and up to date and reflects your current job?**  *If no, then review and agree changes* |
|  |
| **What was your most significant achievement during this performance review period?**  **What impact did this have on the Company?**  **Did these fit with the objectives set?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **What did you find most challenging over this performance review period?** |
| Employee’s comments:  Appraiser’s comments: |
| **Did you have any barriers or obstacles that prevented you from achieving your performance or objectives? If so, what were they? How could these have been resolved?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **What could you, your manager or your colleagues have done that could have further facilitated you achieving your objectives or have made your performance better?** |
| Employee’s comments:  Appraiser’s comments: |
| **What aspect(s) of your work gives you the most satisfaction?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **What aspect(s) of your work do you not enjoy?** |
| Employee’s comments:  Appraiser’s comments: |
| **Do you feel you have regular opportunities to discuss your work and action plans?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **What would you like to be better at?** |
| Employee’s comments:  Appraiser’s comments: |
| **Do you have any skills, aptitudes or knowledge that you feel are not fully utilised in your job? If so, what are they and how could they be used?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **Is there any other aspect of your work not covered above that you would like to discuss?** |
| Employee’s comments:  Appraiser’s comments: |
| **Do you have any ideas for improvement (company, department, job)?** |
| Employee’s comments:  Appraiser’s comments: |

|  |
| --- |
| **How do you generally feel about working for us? If there are any areas where you are unhappy that have not been discussed already, what are these and what can be done about them?** |
|  |
| **Is there anything else you would like to raise?** |
|  |

Review Meeting – Objective Setting

Discuss and agree the specific objectives for the forthcoming period that will enable the employee to reach competence and to meet required performance in their current job, if appropriate taking into account the coming year’s plans, budgets, targets, etc. Examples of objectives could be training, areas for personal development or learning a new skill within the office.

Objectives must focus on results, state explicitly what result is expected and be “SMART”, i.e.:

* **Specific** (clear description of the result expected: not vague or general)
* **Measurable** (identify clear success criteria with which to judge the outcome)
* **Agreed** (the job holder understands what is needed and is committed to achieving it)
* **Realistic** (stretching and motivating, but still achievable)
* **Time focused** (target dates should be set indicating when the result is expected).

Alternatively, they can be based on the 4C areas:

* **Customers** (what are we doing to win and keep them?)
* **Competition** (what are we doing to differentiate ourselves and beat them?)
* **Costs** (the bottom line always counts)
* **Climate** (what are we doing to create the right environment for people to achieve?).

|  |  |  |
| --- | --- | --- |
| **Objective** *Ensure that this is specific* | **Deadline** | **Measurable element** *Make notes here on achievements that will be used in the next review* |
| **1** |  |  |
| **2** |  |  |
| **3** |  |  |
| 4 |  |  |
| 5 |  |  |

Employee Development Action Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Development needs** | **How to address them?** | **Date by which I plan to achieve the development goal** | **Outcome** | **Completed** |
| *Explain the need* | *Explain how you will take action and what resources you will need?* | *The date agreed with your line manager for achieving the development goal* | *How will your practise change as a result of the development activity?* | *Agreement from your appraiser that the development need has been met* |
| **1.** |  |  |  |  |
| **2.** |  |  |  |  |
| **3.** |  |  |  |  |
| **4.** |  |  |  |  |
| **5.** |  |  |  |  |

Review Meeting – Final checklist, overview and signatures

|  |  |  |
| --- | --- | --- |
| **Please comment as appropriate to points 1 and 2** | **Complete** | **Comments** |
| 1. Objectives and deadlines for the next 12 months agreed and completed? | ☐ |  |
| 1. Employee Development Action Plan for the next 12 months agreed and completed? | ☐ |  |
| Any other action(s) agreed to be taken: (please use additional sheet if required) | ☐ |  |
| Overall summary of review by manager/supervisor: |  | |

|  |  |  |  |
| --- | --- | --- | --- |
| **Employee’s signature:** |  | **Appraiser’s signature:** |  |
| **Date:** |  | **Date:** |  |