

**Staff Appraisal Framework  
Formal Appraisal Interview Preparation Guide**

This is an aide memoir for both the employee and the manager to help both parties prepare for the appraisal interview. These forms are for personal use and do not have to be shared.

It is always helpful to give examples to reinforce the points that you are making.

<b>The employee</b> should consider	<b>The manager</b> should consider
what they believe to have been their strong and weak points,	overall results obtained by the employee
barriers to effective performance	examples of performance exceeding expectations or being lower than expected
plans for the coming year	reasons for variations in performance
longer term career plans	
development and training needs	Plans for the future

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**1. General**

- Do you understand all the requirements of your job?
  
- Do you have regular opportunities to discuss your work?
  
- What do you consider to be the key/critical responsibilities of the job?

**2. Performance**

- What have been the main achievements/things to be proud of during the appraisal period?
  
- How well have the key / critical duties / responsibilities taken from the job description been undertaken to the required standard?
  
- Have previously agreed targets / objectives been met?
  
- Which areas of work could be improved? Why do they need to be improved? How could this be achieved?
  
- Are there any “blocks” or “brakes” which hamper performance?

**Culture, Communications and Relationships** (this 'section' is particularly relevant to the 360' feedback)

- Does the style of work colleagues – including managers - affect work performance and relationships?
  
  - Is it made clear what is expected of individuals when they are given / requested to undertake work?
  
  - Is information about issues affecting the organisation made available in a timely an appropriate manner?
  
  - Is individual development and improvement in personal performance encouraged?
  
  - Are individual efforts and contributions are encouraged, recognised and appreciated?
  
  - Can problems be discussed, with an appropriate person, without causing undue concern?
  
  - Are all members of the organisation treated with respect and fairness?
  
  - Consider the feedback on the 360' forms and compare it with your own assessment for each component.
3. **Priorities and Objectives for the next reporting period** (NB these should reflect the priorities and objectives of the organisation)
- What should the priorities be for the next reporting period and why?
  
  - What are the targets / objectives for the next reporting period - & to what standard?

**4. Training and Development Needs**

- What training and development is needed to achieve maximum effectiveness with the current job role?
  
- What training and development may assist to achieve future aspirations?

**5. Anything else**

Use this space as a reminder for anything you wish to discuss at the appraisal which has not been covered elsewhere in the guide. The following phrases may assist: dealing with others; decision making; problem solving; time management.