

# APPRAISALS – PREPARING FOR THE MEETING

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An appraisal is a more formal review and discussion than a job chat. They are usually yearly or six monthly.

The appraisal is an opportunity for the employer and employee to look back at what has been done and how it was done, and to look forward. It should be used to identify any training and development needs and to find out what are the employee's work aims and aspirations for the future.

It is not an opportunity to raise disciplinary issues for the first time.

## Before the Appraisal

- Consider offering the employee the form "Appraisal – Employee Information" form so that they can prepare
- If there have been previous appraisals or job chats ensure you have a copy of those and so know if any training or other targets were agreed at that
- Ensure you know what the employee has done during the year

## During the Appraisal

- Be positive
- Review progress towards any goals that have been achieved. If they have not been achieved, why not?
- Are there any aspects of the person's performance which need discussing? An appraisal is not a disciplinary and it should never be the first time any performance issues are raised but if there is a prevailing issue that may need to be referred to in order to help the person develop.
- When discussing what challenges the employee has faced, ask them to tell you how they dealt with it. Try to draw out detail. Have they been positive in helping themselves through those challenges? If they asked for support, did they receive it? Is there anything they would learn to do differently the next time?

## The Employee's Team Work

- This is the chance for the person to give their suggestions if any improvement in team work is needed. Keep it positive and focused.
- If the employee raises any issues or grievances about other employees, then ensure those are dealt with – the appraisal will not be the place for that but they should be noted as an action point and followed up promptly

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## The employee's job

- Ask the person if they have enough resources, equipment, training and support to help them in their job.
- Do they feel involved in what is going on – do they have sufficient information?
- Ask the employee how they find out if they are doing their job well. Individuals need different types of feed back but it is important that the person is getting sufficient feed back.
- If feedback is particularly negative that should be dealt with outside of the appraisal – as mentioned before the appraisal is not the place to first raise performance issues which may result in a disciplinary.
- Ask the employee if they have any ideas as to improvements as to how they do their job or other aspects of the day to day running of the yard.

## Planning for the year ahead

- Ask the employee if they are clear as to what they and their team need to focus on over the coming six months/year.
- As if there is any training or learning that would help them meet their goals.
- Ask if they have any plans or work ambitions for the coming year or indeed longer. This could centre around developing their skills, so taking on a specific responsibility, becoming a mentor for new joiners. It needs to be realistic and if it is not something the business can offer an opportunity for immediately, look to plan the steps they may need to start working towards that plan and ensure that it is followed up and the employee kept aware of any opportunities.

## Comments

- Allow the employee to raise any other issues.
- Agree what is to be recorded out of the appraisal and note any actions that are agreed. *For example, the employee agrees to attend a training course, learn a new procedure, become responsible for a specific task. Put in a date when progress will be reviewed. Put in what the employer agrees to do, for example, arrange for the employee to attend a training course, enable the employee to take on a specific task or provide additional equipment.*

## After the Appraisal

Ensure that actions are followed up and the employee kept updated with any opportunities, training put in place etc. Allow the employee to see and agree the notes of the appraisal.