

Preparation for good appraisal meetings – a checklist for managers

Throughout the year

- Keep notes on people's performance. **Tip** – a simple sheet headed '++' (good work), '--' (work needing improvement) and '??' (missed opportunity to do better or to develop self) is easy to keep and powerful for individuals to see (at one-to-ones – remember: no surprises at appraisal meetings).
 - Give frequent and timely feedback to individuals.
 - Conduct frequent one-to-one meetings and team briefings.
 - Keep people in the picture about the organisation, its strategy, circumstances, changes etc.
 - The more managers appreciate where their staff are coming from, their aspirations, their problems and their motivations, the better – and the continuation of genuine dialogue throughout the year will help achieve this.
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In the run up to the appraisal round

- Remind yourself that appraisal is an investment in the future performance, development and success of your staff for their own good and for the organisation – make sure you put in the time and effort to get a good return.
 - Review – the job description, last appraisal form, your records of individuals' performance, one-to-one meeting notes, etc.
 - Consider the whole of the last period – objectives, work plans, targets, service level agreements, training and development plans – how well were they achieved?
 - Consult – colleagues and customers/clients – what feedback can they provide about the individual's work and working/professional relationships?
 - Consider – individual, departmental and organisational needs.
 - Be aware of – individuals' results, achievements, new qualifications.
 - Anticipate – areas of concern, questions, aspirations, development needs – how will you handle them?
 - Decide – on a few key messages. **Tip** – three is a good number for focus, impact and memorability.
 - Consider for the forthcoming period – objectives, work plans, targets, service level agreements, training and development plans.
 - It may be worth checking the review procedure in case any issues arise on which the manager and the individual cannot agree – see Appraisal Guidance Notes.
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Pre-meeting

- It is a good idea to hold a short pre-meeting before the appraisal to explain the objectives, purpose and procedure.
 - If this is an individual's first appraisal, the manager might want to explore the individual's feelings about appraisal to allay any concerns, as well as stressing the benefits.
 - Give the individual the relevant paperwork – such as their job description, the form from the last appraisal, the form for the forthcoming appraisal to help them prepare.
 - Encourage the individual to self-assess their performance and bring along relevant facts and examples of achievements to discuss at the actual appraisal meeting.
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