***[Name & Logo of organisation]***

**Staff Performance Appraisal**

**Introduction**

*[Name of organisation]* recognises that it needs highly motivated and effective staff if it is to achieve its conservation aims. The Staff Performance Appraisal scheme provides an opportunity to discuss and improve the way staff carry out their jobs, and helps to create an environment of continuous improvement.

**Policy**.

It is the policy of *[Name of organisation]* that all paid staff have an appraisal of their performance at least once a year. *[Optional: In addition, all staff have regular meetings with their managers throughout the year to guide their work and ensure continuous improvement in their performance.]*

**The Purpose of Appraisal**

The appraisal discussion is an opportunity for manager and staff member to discuss the staff member’s successes and disappointments in their work over the previous year, and any reasons that *[objectives/ part of workplan have/has]* not been achieved. It is also the time to agree *[objectives/workplan]* for the coming year, to discuss any potential difficulties and the training, help, support or advice that may be needed in order for the staff member to be successful. The aim of appraisal is to improve or maintain motivation. It should be a positive experience for both parties.

The purpose of Appraisal is:

1. To ensure that staff are carrying out their duties to the standard required by *[Name of organisation].*
2. To ensure that the time and effort of staff is focused on the priorities of *[Name of organisation],* as set out in the Strategic Plan, and other documents such as the Job Description, or [*Annual Workplans or objectives*].
3. To review progress against [*objectives/workplan]* set at the previous appraisal. For the manager and staff member to discuss successes and disappointments - to applaud successes and agree how weaknesses can be overcome and performance improved.
4. To discuss and agree *[workplan/objectives]* and personal objectives for the coming year. (An example of a personal objective is “to improve the quality of your written reports).
5. For the staff member to be able to discuss their work and to decide whether additional guidance or training is necessary.

**Appraisal Process**

1. All paid staff are appraised using *[name of the organisation’s]* performance appraisal system at least once every year.
2. The appraisal will be held in a place where the discussion cannot be overheard, and where there will be no interruptions. Mobile phones etc will be switched off for the duration of the appraisal discussion.
3. Manager and staff member will allocate plenty of time for the discussion, so that all the issues can be discussed.
4. The manager will give the staff member enough notice (at least 1 week) for them to prepare for the appraisal.
5. Both staff member and manager will prepare by considering the extent to which the *[workplan or objectives]* that were agreed last year have been achieved, and any reasons that lie behind successes or disappointments. It will be easier to say what you want to say at the appraisal, if you are prepared.
6. The appraisal discussion follows a standard process, as set out on the form:
   1. Review of [*objectives or workplan]* for the past year
   2. Summary of overall performance
   3. Agreement on [*workplan or objectives]* for the coming year, including the standard that must be achieved
   4. Discussion about the help, guidance, training or support that the staff member needs, either from their manager or externally.
   5. Discussion of anything else that affects the staff members work.
7. During the appraisal discussion, the manager takes notes. The staff member may also do so if they wish.
8. After the appraisal the manager records the discussion on the Performance Appraisal form.
9. The form is given to the staff member for them to agree and sign, or comment on.
10. Once both staff member and manager have signed the form it is sent to the manager’s manager, for approval and signature. In some cases, this may be a Board Member. This helps to ensure that the process is fair and objective.

*[NB square brackets with italic text indicate that the organisation must insert either its own name or the most phrase for objectives/workplan/ targets etc that it uses.]*

***[Name & Logo of organisation]***

**Staff Performance Appraisal**

It is the policy of *[Name of organisation]* that all paid staff have an appraisal of their performance at least once a year. The appraisal discussion is an opportunity for manager and staff member to discuss the staff member’s successes and disappointments in their work over the previous year, and any reasons that objectives have not been achieved. It is also the time to agree objectives for the coming year, to discuss any potential difficulties and the training, help, support or advice that may be needed in order for the staff member to be successful. The aim of appraisal is to improve or maintain motivation. It should be a positive experience for both parties.

**Appraisal Form**

**Name of Staff Member......................................................Job Title............................**

**Name of Appraiser............................................................**

**Date of appraisal...............................................................**

|  |  |
| --- | --- |
| ***[Objectives]* as agreed last year, or as set out in Job Description or [*Workplan]*** | **Notes of discussion on how well each *[objective or task]* has been achieved, including reasons for success or failure.** |
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| --- |
| **Summary of Overall Performance** |
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| --- | --- |
| ***[Objectives/priorities*] for the coming year** | **Success criteria (ie how you will know if the work has been done to a satisfactory standard** |
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| --- | --- |
| **What help, guidance, training or support will the staff member need in order to achieve their [*objectives*/*tasks workplan]*?** | **Who will arrange or provide the help, guidance, training & support?** |
|  |  |
| **Any other comments from the Manager?** | **Any other comments from the staff member?** |
|  |  |

Signed by:

**Staff member...............................................................................Date..............................**

**Manager.......................................................................................Date..............................**

**Manager’s Manager.....................................................................Date.............................**