

APPRAISAL MEETING CHECKLIST

Action	Done
1. Establish a private and comfortable environment for the meeting. <i>(Make sure that you are not interrupted by arranging for all your calls to be taken by a colleague.)</i>	
2. Ensure that you have copies of all supporting evidence, data, information and third-party feedback required to justify and explain your summary of the individual's performance.	
3. Welcome the individual and thank them for their response to your summary of their performance. Explain your agenda and timings for the meeting.	
4. Reiterate your organization's mission and how the individual contributes to this.	
5. Review and discuss their performance against the goals set. Use the evidence, data and third-party feedback to justify your ratings. Gain their agreement on final ratings for each goal and an overall performance rating and write this on the form.	
6. Review and discuss their displayed levels of the required competencies. Use the evidence from your observations, significant incidents and third-party feedback to justify your chosen level. Gain their agreement on the level of competency at which they are operating and write this on the form.	
7. From the agreed performance ratings and level of competency discuss and agree an overall performance rating. Both you and the individual will now sign and date this section of the form. If it is appropriate for your organization inform the individual how this translates in terms of the pay scale or grade, potential pay rise or bonus.	
8. Describe each of the goals you wish to set for the individual for the coming year and how this contributes to your organization's mission and strategy. Enter this onto the form and get their signed agreement to these new goals.	
9. Outline how you would like the individual to develop their competencies according to the role description for the coming year. Enter this onto the form and gain their signed agreement.	
10. Identify and set a development and training plan to address any skill gaps that would hinder the individual achieving these goals or required competencies. Ensure that these match any career aspirations the individual may have. Enter these onto the form in the appropriate section or attach a separate sheet detailing this information to it.	