

PREPARING FOR APPRAISAL MEETING CHECKLIST

The checklist outlines eight basic steps you need to complete so that you are properly prepared for your team's appraisal meetings.

Action	Timeframe	Completed
<p>1. Allocate and plan your team's appraisal period in your diary. <i>This should meet organizations objectives and minimize impact to your own workload.</i></p>	<p>6-8 weeks before completion date</p>	
<p>2. Agree a date, time and length for each team member's private appraisal.</p>	<p>4-6 weeks before appraisal</p>	
<p>3. Write and distribute your assessment of each team member's performance for:</p> <ul style="list-style-type: none"> • Individual goals • Required competencies • Training and development plans <p>Inform individual that they need to read and respond in writing to your assessment of their performance. This will form the basis of your discussion with them in order to gain agreement of their overall performance.</p> <p>Where possible use the appraisal form for this communication attaching any additional information or data to it.</p> <p><i>Use your completed 'Goal Attainment & Evaluation form' as basis and evidence of your assessment. Draw out 3 key messages.</i></p> <p>For those individuals you know have under-performed or are facing disciplinary procedures send out the necessary information with your overall assessment.</p> <p>Inform any other individual that may need to be involved in the latter type of appraisal meeting. Ensure that you send them all the relevant information and data so that they are familiar with the situation.</p>	<p>4 weeks</p>	

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4. Read through each individual's response to your assessment of their annual performance and make notes on their comments and their own summary.	2 weeks	
5. Compare last year's performance rating and level of competency with that of the current period.	1-2 weeks	
6. Prepare your notes and constructive feedback: <ul style="list-style-type: none"> • Select your preferred communication style. • Anticipate type of questions, concern, training needs and, aspirations. 	1-2 weeks	
7. Outline next year's goals and competencies you need to agree with each member. Ensure that each is related to how the individual contributes to the organization's mission.	1-2 weeks	
8. Ensure that each individual's form is fully up-dated with all necessary evidence and data included in readiness for the meeting.	1 weeks	