

## **Factsheet: Conducting an Effective Appraisal**

### **Appraisal - what is it?**

CIPD, the professional body for HR and people development, defines appraisal as follows

*"A continuous process involving agreeing standards and objectives, giving and receiving constructive feedback on performance and identifying appropriate training and development opportunities, in order to contribute to the success of the organisation"*

### **Appraisal is not:**

- A negative process
- A disciplinary interview
- An attack on the appraisee's personality
- A salary discussion

### **What is the purpose of an appraisal?**

- To review the past
  - What went well - achievements and meeting of objectives?
  - What did not go so well and why?
- To consider the present
  - Current issues, review of practices, priorities, support required
- To discuss the future
  - Setting 'SMART' objectives
  - Align with the strategic aims of the school

### **Conducting an effective appraisal - Four steps**

- Step 1 - strategic preparation
  - Planning by the school's senior leadership
  - Identify strategic aims and plan for the year ahead
  - Decide who will carry out the appraisals
- Step 2 - prepare for the appraisal
  - Review last appraisal
  - Observations/information gathering
  - Consider examples for feedback

- Step 3 - the appraisal meeting
  - Ideally appraisee-led
  - Ask open questions to prompt discussion
  - Provide constructive feedback
  - Review past objectives and set new ones (make them SMART!)
- Step 4 - following the meeting
  - Finalise and complete the paperwork
  - Diarise review meetings to monitor progress against objectives - it's an ongoing process
  - Consider whether any training or support is required

VWV's HR consultancy offers a range of services complementing the legal support provided by the firm's education team. The HR consultancy is staffed by highly experienced practitioners who have worked for many years as employment lawyers and now specialise in HR.

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