**Appraisals – Line Manager Guide**

An appraisal is an annual or bi-annual performance review depending on the Company’s processes. They are often linked to pay reviews, but this depends on the Company’s policy.

It follows regular Check-In discussions (*see Employee Check-Ins – Line Manager Guide*) where performance, development and training needs, and personal development plans have been discussed throughout the year.

During appraisals, employee performance is evaluated against the goals, objectives and expectations set at their last appraisal. If the employee still needs to have an appraisal, then their performance should be evaluated against the goals, objectives and expectations agreed following successful completion of their probation.

The appraisal discussion should not bring surprises as any performance concerns, development needs or personal achievements, should have already been discussed at the Check-Ins throughout the year or as soon as the need arose.

The feedback provided during appraisals should be constructive.

**Key Things to Consider:**

* Prepare for the meeting - both employee and Line Manager should be prepared for the meeting. Development is just as well the employee’s responsibility as the Line Manager’s.
* Line Managers should send the appraisal form to the employee and the onus should be on the employee to complete their own appraisal documentation.
* Make sure that a private room is booked for the meeting and enough notice is given to the employee so they can prepare.
* The Line Manager should review the document started by the employee and add their view and anything additional that is discussed during the appraisal.
* Listen to the employee as well as provide your evidence based view.
* Make sure to keep a balance – do not focus on only the negatives, but also mention the positives.
* Scoring should be based on facts and the discussion and in line with the Company’s scoring system.
* Appraisal processes should always end with setting new goals and objectives for the year ahead.
* Goals and objectives should always be **SMART** - Specific, Measurable, Achievable, Realistic and Time-bound.
* Send the employee a written outcome of the appraisal and keep a record of it.

Ensure that the employee acknowledges that they have had the appraisal discussion.