



Association for Agency-Based Counselling
& Psychotherapy in Ireland Ltd

Guidelines-Staff Appraisal

This document is only to be used as a guideline for organisations

*Should you require any further support or have any queries please contact
(AACPI National Director)*

www.aacpi.ie

Registered Charity No. CHY
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Staff Performance Review Guidelines & Form

The (name of organization) Performance Appraisal Process – Guidance Notes

The purpose of the (organization) appraisal system is to review and assess staff performance and progress over a period of one year. The success of the appraisal system depends on the commitment and willingness by staff to engage in the process.

What is the Appraisal Process?

This is the process of ensuring that staff knows exactly what is expected from them in their work and measuring how performance meets these expectations. It is an opportunity for managers to engage in an open, two-way discussion about achievements, progress, career expectations, training and development opportunities and future developments for the following year.

Objectives of the appraisal system are to:

- Enhance communication between staff and management.
- Integrate organisational objectives with individual assessment.



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- Review and measure progress and performance against job descriptions, expectations and plans.
- Enhance performance.
- Motivate staff.
- Provide feedback to employees on how they are performing.
- Provide an opportunity for employees to give feedback to managers and to discuss their career aspirations and ambitions.
- Identify training and development needs.
- Set future objective and goals.
- Provide an opportunity to discuss wider work and organizational related issues.

Underlying principles upon which the process is based:

- Two-way dialogue.
- Aimed at performance improvement.
- Openness and confidentiality
- Transparency
- No surprises

When, Where and How – The Appraisal Interview

Staff appraisals will take place between the individual staff member (appraisee) and their respective line manager. The appraisal system will measure performance only. It will not directly affect annual salary; however, reviews could potentially be taken in to consideration in that process. Staff will receive one months notice to prepare in advance of the appraisal interview at which stage all supporting documentation will be provided.

Pre – Appraisal Interview Preparation:

One month in advance of the proposed appraisal interview, the time and venue will be arranged and confirmed with the employee.



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One month in advance of the proposed date of the appraisal interview, employees will be presented with copies of the following documentation:

- Appraisal interview process; guidance notes (this document)
- Appraisal interview form

Employees will also be given a copy of their job description to prepare and assess his/her performance over the past year.

Two working days before the appraisal interview, both parties will exchange drafts of the filled out appraisal interview form (this may take the form of hand written notes in bullet form under each heading). These documents will not form part of the final record, as the purpose of this exchange is to aid preparation and encourage transparency.

The Appraisal Interview:

Two hours will be scheduled for the appraisal interview.

The interview process will be divided into two parts. **The first part** will concentrate on the following areas:

- Achievements and overall performance versus work plan over the last year.
- Manager's assessment of the performance over the past year.
- The employees' own assessment of their work performance.
- Identifications of areas of training and development.
- Career ambition.

The key points will be documented for future discussion.

The second part of the appraisal builds on the first part and will involve putting together an action plan outlining the necessary steps to improve performance, enhance motivation and address long term career development. This will include the following:

- Actions needed to improve work performance and outputs.
- Actions needed to improve job satisfaction.



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- Setting of future goals and objectives – work related.
- Plan of how to achieve the training needs that have been identified.
- Set next review date.

Post Appraisal Interview:

Following the interview the appraiser will write up what was discussed and this will be forwarded to the appraisee for additional comments and feedback. Once agreement has been reached that the content of the report represents a true and accurate account of what was discussed during the interview, the form will be signed by both parties and filed on record. A copy will be provided to each party.

Staff Personal Appraisal Interview Forms (Part 1 & 2)

Appraisal Interview Form – Part 1

General Details:

Date of Appraisal:

Name:

Job Title:

Manager:

Employment Commencement Date:

Date of Last Appraisal:

Assessment Areas:

Objectives and Achievements:



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In what areas of the job do you consider the appraisee has performed well during the appraisal period and how far have the agreed objectives been met?

Positive Aptitudes

Consider the appraisee's main strengths/abilities and how these can be further developed/utilized.

Planning and Organising

(Consider the appraisee's ability to plan and to complete tasks and projects on time. Time management skills, organisational ability, attention to detail and reliability should be covered)

Supervision/Management

(Consider style and relationship with direct line manager. Where applicable, consider management and supervisory style as a manager).



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Communication

Consider oral and written communication skills

Relationship Building, Motivation

Consider, team and overall participation, use of initiative, willingness to be flexible and interpersonal relationships. Consider relationships with peers, manager and other groups.

Training & Development

Review of training undertaken during the previous year.
Identification of future training and development needs.

Areas of Improvement

What objectives have not been met?
How can these objectives be met in the coming year?



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Overall Assessment

(Overall how would you describe the appraisee's work performance during the past year?)

a) Future Goals and Objectives

Period: _____

Goals	Performance Standard (E.g. how often? By when? How?)

b) Further Comments:

c) Date of Next Appraisal Interview:



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Signed:

Name: _____ **Name:** _____

Position: _____ **Position:** _____

Date: _____ **Date:** _____