

# Appraisal Templates

September 2022



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## 1. INVITATION TO APPRAISAL MEETING

CONFIDENTIAL

To:
From:
Date:

**Your annual Appraisal meeting has been set for:**

Date:	
Times:	to
Venue:	

*If this date or time presents a problem for you please let me know as soon as possible.*

**Attached you will find:**

- **Preparation for Review** discussion form (appendix 2) to lead you into thinking about how your work is progressing generally.
- A copy from last year of your **Objectives** (appendix 3) so that you can review progress towards your objectives
- An **Evidence for Appraisal** form (appendix 4) which you may wish to collect additional evidence from colleagues for our discussion. *(Please print/photocopy as many as are required).*

**For you to do:**

Think about your objectives from last year so that we are able to discuss how you have progressed towards your objectives.

Please pass to me your completed Preparation for Review form (if you wish to complete this), as this will help our discussion. If possible please let me have this in advance of the meeting

Please bring to the meeting anything else that you feel will be helpful in building up a picture of your work and personal development including any Evidence for Appraisal forms and your Professional Development Portfolio if you have one.

I look forward to meeting with you.

Yours sincerely

## 2. PREPARATION FOR REVIEW DISCUSSION

*(You are not required to complete this form but doing so may help both you and the appraiser to get the best out of the process).*

<b>Name</b>	Job Title
<b>Department (if appropriate)</b>	Appraiser
<b>Line Manager</b>	Appraisal Period From _____ to _____

Use this form to help you think about your role before your Appraisal discussion on:

**Date** \_\_\_\_\_ **Time** \_\_\_\_\_ **to** \_\_\_\_\_

**Location** \_\_\_\_\_

You may write as little or as much as you wish (please add extra pages if you want to). Bullet points may be useful to write the most important information. Everything you write will help your Appraiser to make the discussion positive and useful.

If possible, it would be helpful if you would return a completed copy of this form to your Appraiser at least **one week** before the meeting.

What do you think are your main duties? Have these changed in recent times? Which parts of your job do you consider you do well?

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Are there any parts of your role that you have difficulties with? Are there any particular issues that cause you problems? What do you think could be done to overcome any problems?

What do you think have been your most important achievements over the last year?

Is there anything else in your work that you would like to provide information about (i.e. something you are proud of that your Appraiser might not know about)? If appropriate please give the person you worked with an **Evidence for Appraisal** form (Appendix 4), and ask them to complete it. Please make a note here about who you are asking to do this.

What would help you to do your job better? (Training, shadowing other staff, working in another part of the school for example).

Which professional or occupational standards could/should you be focussing on in the coming year?

Looking to the future, what do you think your objectives for next year should be?

Are there any other points which you would like to raise at your Appraisal?

### 3. PROGRESS AGAINST PREVIOUS OBJECTIVES

(You are not required to complete this form but doing so will help both you and your Appraiser to obtain the most out of the process).

Objectives	Fully Met (✓)	Partly Met (✓)	Not Met (✓)	N/A (✓)
Objective 1.				
Objective 2.				
Objective 3				
Additional comments and evidence regarding progress against objectives				

Do you consider each of these objectives has been? (✓)

	Very Challenging	Challenging	Quite Challenging	Not Challenging
Objective 1				
Objective 2				
Objective 3				

**4. EVIDENCE FOR REVIEW DISCUSSION – FEEDBACK**

From: ..... (Appraisee)

To: ..... (Colleague worked with)

I will shortly be attending a meeting to discuss my annual Appraisal and I am currently completing my self-assessment. **Since my last Appraisal I have worked with you on the activities that I have outlined in Box 1 below.** I would be very grateful if you would take a little time to provide me with some feedback on our work together to help me to develop my objectives for next year.

Please could you return this form to me by: .....

<b>1. Brief description of the activity worked on with colleague. (Completed by Appraisee):</b>			
<b>Approximate dates this work took place (Completed by Appraisee):</b>			
From		To	

<p><b>2. Please comment on what <u>my</u> contribution did to enhance our work:</b></p>
<p><b>3. Please add any advice, or make other constructive comments, that will help me to develop my performance.</b></p>

**5. APPRAISAL PROCESS – TRACKING SHEET (ALL STAFF)**

<b>Appraisee name</b>		<b>Job title</b>			
<b>Appraiser name</b>		<b>Headteacher/Line Manager</b>			
<b>Appraisal period</b>		<b>From:</b>		<b>To:</b>	
Self-review form provided (before the meeting)		Date:			
Appraisal Report discussion		Date:		<i>NB: both discussions may take place on the same day</i>	
Objective Setting discussion		Date:			
Appraisal objectives agreed	Yes	No	If no, date by which Headteacher/ Appraiser must respond		Date:
Observations agreed (If applicable for Support Staff)	Yes	No	If no, date of further meeting with Appraiser		Date:
Training and development plan agreed	Yes	No	If no, date of further meeting with Appraiser		Date:
Appraisee completion signature					Date
Appraiser completion signature					Date
Head teacher agreement signature					Date
CPD Leader - Training Plan agreement signature					Date



## 6. APPRAISAL REPORT

For the year 20... to 20... NAME.....

A report by the Appraiser including an overview of the Appraisal period based on lesson observations, role expectations, and Appraiser and Appraisee discussions including any interim reviews, self-review and additional evidence offered by the Appraisee.

**What has been achieved over the last year? What has been learned? Suggestions for improvement. Links to roles and responsibilities and level of experience.**

**Progress against previous objectives and links to the appropriate standards.**

**Pay progression recommendation for eligible staff.**

**Reviewee comments on the report above.**

**Headteacher comment (if appropriate) and sign off.**

## 7. OBJECTIVES AND OBSERVATION

For the year 20... to 20... NAME.....

Objectives must be linked to the appropriate professional standards, the school improvement plan priorities, pupil progress, school/team goals and include appropriate aspirational elements. Objectives should also take account of experience and role as well as workload and work life balance.

What Are Your Objectives for the Coming Year?	Performance Criteria - How Will You Know If You've Achieved These Objectives?	Timeline Dates	Links to School or Team Objectives	Links to Professional Standards

<b>Agreed Observation/s</b>	<b>Focus Criteria for Observation</b>	<b>Timeline Dates</b>	<b>Links to School or Team Objectives</b>	<b>Links to Professional Standards</b>

## 8. TRAINING AND DEVELOPMENT PLAN

(For the attention of the CPD Leader/Headteacher)

Plans should be clearly linked to the agreed objectives in Appendix A5.

20... to 20...

NAME .....

Appraisee name .....	Appraiser name .....	Team	Year 20.... to 20....	
What do I need to be able to do differently or better? <b>Skills/ knowledge to be developed.</b>	How will these needs be met – <u>suggestions</u> for resources and CPD activity required.	Who needs to be involved and will action this?	<b>By when?</b>	Links to objectives and standards

## 9. REVISION AGREEMENT

Date ..... Name .....

Objective	Reason for change to objective			
New objective	Performance Criteria - How will you know if you've achieved these objectives?	Time line / Dates	Links to professional standards	Links to school or team objectives
What do I need to be able to do differently or better? <b>Skills/ knowledge to be developed.</b>	How will these needs be met – <u>suggestions</u> for resources and CPD activity required.	By when?	<b>Who needs to be involved and will action this?</b>	<b>Links to school or team objectives</b>