logo

<Replace with your business logo>

# Performance Appraisal: <Insert Staff Name>

Current position title: <Insert Position Title>  
Manager Name: <Insert Manager Name>  
Date: <Insert date of review>

Performance appraisal gives us the opportunity to review how we are all going in pursuit of our firm-wide goals. You also have the opportunity to review staff performance; provide specific feedback and listen to make improvements. We can only achieve our firm goals effectively when we work together. You may wish to start this meeting with a business update.

These questions relate to their current position description

**1. Training / CPD Points**Have they completed the outlined training and CPD point requirements?  
YES NO UNSURE Additional comments:

**2. Job Purpose**Are they clear and confident on their job purpose?  
YES NO UNSURE Additional comments:

**3. Behavioural Competences/Values**

Have they met the behavioural competences / values outlined within their position description?

|  |  |
| --- | --- |
| **Competency or Value** | **Rating** |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |
| <Insert from position description> |  |

Rating

5 = Outstanding, if the employee has achieved the performance measure on almost every occasion

4 = Above average, if the employee has achieved the performance measure most of the time

3 = Satisfactory, if the employee has achieved the performance measure some of the time

2 = Minimum standard, if the employee infrequently achieves the performance measure satisfactorily

1 = Unsatisfactory, if the employee seldom if ever achieves the performance measure

0 = Not applicable during this review period

Additional comments:

**4. Key Result Areas — Part A**Using the table below, which is partly taken from their job description, have key result areas been achieved?

|  |  |  |  |
| --- | --- | --- | --- |
| **Key Result Area** | **Major Activities** | **Performance Measures** | **Has the goal been achieved? 1 – 2 – 3 – 4 - 5** |
| **Finance** | <Insert from position description> | <Insert from position description> |  |
| **Clients** | <Insert from position description> | <Insert from position description> |  |
| **Process** | <Insert from position description> | <Insert from position description> |  |
| **People** | <Insert from position description> | <Insert from position description> |  |

**4. Key Result Areas – Part B**

Looking at the results and changes within the firm re-set the job description, including the key result areas for the next period. Work to achieve mutually agreeable targets.

**Q5. Are there any questions about your job you wish to discuss?**

* Are any of your responsibilities unclear?
* Things you’d like to do more of?
* Things you’d like to do less of?

**Q5. Are there any questions about our firm you’d like to discuss?**

* Things you’d like to know more about?
* Barriers or challenges that stop you from doing a better job?
* Issues about our clients we need to improve upon?

**Q6. Are there any questions about your career you’d like to discuss?**

* Training and development you’d like to have or need to complete?
* Your future in the organisation?
* Other areas you’re concerned about?

**Action Items — Managers use the space below to note follow up issues and action items.**Ensure you remember to tell the staff member when you will get back to them on these items.