



Appraisals

Eligibility

Each year, each member of staff will take part in a meeting with their immediate manager to discuss aspects of their work performance. The objective of the meeting will be to review the previous year's achievements and to discuss any future training, development and career planning relevant to the individual and to the Charity.

This meeting should be regarded both as a stocktaking exercise and a springboard. Continuous dialogue throughout the year between the manager and the appraisee should inform the agenda of the meeting, and the outcome of the discussion should be a clear plan for both participants in terms of taking action to ensure that the appraisee is enabled to achieve their full potential in the work that they carry out for the Charity.

The objectives of the performance appraisal scheme

The objectives of the performance appraisal scheme are as follows:

- To provide a platform for managers and their direct reports to review aspects of job performance on a regular basis so that each individual is provided with the wherewithal to perform their job to the best of their ability, and to make the best contribution possible towards the organisation's goals. The process should provide clear direction towards personal and organisational objectives, so that each individual is able to achieve their potential, gain maximum job satisfaction and contribute towards the Charity's success.
- To add value in identifying individual training, development and career needs. Discussions on such needs should focus upon genuinely assisting the appraisee in acquiring the relevant skills, knowledge and behaviours (competencies) for their to perform well in their current role. Opportunities for advancement or alternative work may also be on the agenda.

Frequency of Appraisals

On appointment probationary period appraisals will be at 3 months service and before completion of the 6 month probationary period.

During the probationary period there will be fortnightly supervision meetings.

Probationary periods of employment may be extended by up to two 3 month periods, but will never exceed one year. Human Resources should be informed before a probationary period is extended. When a probationary period is extended targets will be set and there will be monthly performance reviews.

Following confirmation of employment, appraisals take place at the following intervals:

- 12 months after appointment;
- 18 months - review of appraisal;

- 24 months.

And annually thereafter, with reviews taking place after each six month period following appraisal. Reviews may take place during supervision meetings.

Targets set in appraisals will be continually assessed in supervision. See Staff Supervision Procedure.

The appraisal following the Psychosocial Practice training module may be conducted at the same time as the organisational appraisal when relevant.

Appraisal Procedure

The self-appraisal form will be given to the staff member two weeks before the appraisal meeting. The appraisee is expected to reflect on her/his performance, with reference to the job description and give examples of strengths and areas for development.

The supervisor will complete the appraiser's preparation for appraisal form, giving clear evidence to support any judgments expressed.

The completed self-appraisal form must be returned to the supervisor at least two days in advance of the appraisal meeting.

The appraisal meeting will take place, attended by the staff member and supervisor and, in some instances, the supervisor's line manager. If attending, the line manager's role will be to facilitate communication. Either the staff member or the appraiser may request the line manager's attendance.

Adequate time will be set aside for this meeting, which will be conducted without interruption. It is expected that the meeting will last from 1 to 1 1/2 hours.

The appraisal meeting will consider:

- Targets set at the last appraisal meeting and how these have or have not been met;
- How the training, support and supervision plan has operated;
- Current performance judged against the job description;
- Future targets, with timescales;
- Career development, with timescales;
- Any additional training, support and supervision needs.

The appraisal report form will be completed by the supervisor, with training needs, targets and timescales identified, within one week of the meeting.

The staff member will add her/his own input to the appraisal report form, sign it and return it to the supervisor, within one week of receiving the completed form.

The dates of the 6 monthly review of the appraisal and the next appraisal will be agreed and noted on the form.

Copies of the appraisal report form will be retained by the staff member and in the supervision file and a copy will be sent to Human Resources.

Where there are Concerns about the Performance of Required Duties

If there are concerns that a member of staff is not meeting the requirements of the job description or the targets set the supervisor will:

- Inform Human Resources of the circumstances;
- Make this explicit, leaving the member of staff in no doubt that there are concerns and that if improved performance is not forthcoming further action may be taken;
- Inform the line manager and produce the necessary paperwork to support the concerns;
- Put in place strategies to assist the staff member to improve performance;
- Set targets with timescales and review progress.

Failure to meet targets as evidenced in supervision notes or elsewhere may result in:

- Additional appraisal between agreed periods. This will be in order to monitor and assess progress, with a record of all decisions and action to be taken;
- Not satisfactorily completing the probationary period, in which case the contract of employment with Childhood First will be terminated with appropriate notice;
- Disciplinary action in accordance with Childhood First's Disciplinary Procedures under the category 'poor performance.' Evidence that the employee's performance has been monitored will be required at the disciplinary hearing, especially the strategies put in place to help performance improve.

Key Legislation

- Data Protection Act 2018
- General Data Protection Regulation (2016/679 EU)

Reviewed March 2020