

# PERFORMANCE APPRAISAL



<b>Full name and surname of the team member</b>	
<b>Job Title</b>	
<b>Full name and surname of the line-manager</b>	
<b>Full name and surname of minute taker/second reviewer</b>	
<b>Date of Review</b>	

**STEPS:**

- It is recommended that at least 45 to 60 minutes be set aside for the review.
- Parts One and Three are to be completed by the team member before the review.
- Part Two is to be completed by the line manager before the review.
- Parts Two and Three should be discussed during the review to bring alignment to the overall goals and plans.

<b>PART ONE: SELF EVALUATION</b>	
<ul style="list-style-type: none"> <li>• <i>The team member is to complete the below questions as best as you can. Take notes during your meeting if any changes may be needed in each answer, based on the feedback from your line manager.</i></li> </ul>	
1. Highlight at least 2 staff values you have embodied in the last 6 months? Please include examples of how you have embodied these values.	
Value Each Other	
Live with Integrity	
Pursue Excellence	
Love Generously	
Inspire Innovation	

## PERFORMANCE APPRAISAL



Team Together	
2. Which of our staff values do you hope to embody/grow in during the next 6 months? Please elaborate.	
3. What key objectives or goals would you like to highlight or celebrate in the second half of 2023?	
4. As you reflect on the second half of 2023, is there anything you could improve on, do better in or change going into 2024? This can be skill and/or character related. If so, how do you intend to make this change and how can Common Good support you?	
5. What key objectives or goals do you think are important in your role for the first half of 2024?	
6. Are there any areas of your role or job description that require greater clarity or discussion?	
7. Any additional feedback or comments? Do you have any feedback for your line manager?	

### PART 2: TEAM LEADER FEEDBACK

- The line manager should rate the Team Members 'KPAs based on the past 6 months reflecting on the KPAs listed in the 2023 Mid of Year Review. The team member should rate themselves too.
- The team member and line manager should then discuss the rating chosen in the review, motivated by relevant examples and mutually agree on a final rating. Include this in **Table 1**.

- The team member and line manager should discuss goals/short-term objectives that should be achieved over the next 6 months based on his/her job description, which will be reviewed in July 2024. If there are no changes to the current key focus areas and they are consistent, the same objectives should be added to **Table 2** as indicated in **Table 1**.

**Rating Scale:**  
As the line-manger use the below scoreboard to evaluate your team member's Key Performance Areas. Please ensure that justifications are made in the comments section for the score you have given your team member.

<b>Exceeds Expectations</b>	<b>4</b>	Consistently exceeds the quality and/or quantity criteria for this role
<b>Expectations fully met</b>	<b>3</b>	Meets the set criteria for the designated role
<b>Met some but not all expectations</b>	<b>2</b>	Inadequately met the set criteria for the designated role
<b>Did not meet expectations</b>	<b>1</b>	Performs significantly below the set criteria

**SECTION A: GENERAL FEEDBACK BY THE LINE MANAGER TO THE TEAM LEADER**

1. As the line manager, are there any key objectives or goals that you would you like to highlight or celebrate in the second half of 2023 for your team member?

2. As the line manager, reflect on the second half of 2023. Is there anything your team member could improve on, do better in or change going into 2024? This can be skill and/or character related.

**TABLE 1: REVIEW OF KPAs FOR THE SECOND HALF OF 2023**

No.	Short-term objectives identified as per the previous review	Team Member Comment	Line-Manager Comment	Team Member Rating	Line-Manager Rating	Agreed Rating
1				Choose an item.	Choose an item.	Choose an item.

2				Choose an item.	Choose an item.	Choose an item.
3				Choose an item.	Choose an item.	Choose an item.
4				Choose an item.	Choose an item.	Choose an item.
5				Choose an item.	Choose an item.	Choose an item.

**SECTION B: KEY DELIVERABLES FOR THE FIRST HALF OF 2024**

1. As the line manager, what is your overall objective(s) for your team member for the first half of 2024? Are you and your team member aligned with the key objective(s) for the first half of 2024?

**TABLE 2: KPAs FOR THE FIRST HALF OF 2024**

- All short-term objectives identified for the remainder of the year, should be indicated in the table below. Team Leaders and Line Managers should formulate KPA's from the revised programme strategy for the first half of 2024 for their team members.
- The short-term objectives will be rated in the 2024 Mid of Year Reviews.
- Job descriptions should be updated should any changes be made to current responsibilities, this should be mutually agreed and signed off.

No.	Strategic Objective	KPA (key deliverable to ensure the strategic objective is met)	Evidence that the performance standard has been met	Completion date or timeframe
1				

2				
3				
4				
5				

**PART 3: PERFORMANCE IMPROVEMENT/DEVELOPMENT PLAN**

This section of the performance review focuses on setting **key performance areas** and development plans to further assist the organisation in measuring performance and assist the employee with further understanding of their key deliverables to aid in their success. This is to be completed before the performance appraisal by the team member to be discussed with and agreed upon by the line manager. Line Managers may suggest the below-mentioned training too.

If there is any additional training/development the employee would like to request since the last review, they may indicate it below. A development plan should be discussed with the line manager to further upskill the employee for further potential growth within Common Good. This may be linked to the feedback given by the line manager in previous sections (above). E.g. Mentorship plan, upskilling in hard/soft skills. Progress on the mid-year review development plan should be discussed.

Note: The following development plans can be offered:

- Inhouse training,
- on-the-job training,
- mentorship,
- upskilling hard/soft skills.

As the line manager, move toward the Management Team should any developmental opportunity require funding from Common Good.

<b>AREA FOR DEVELOPMENT</b> <i>(identify priority education, knowledge, skills, or competency area(s) to be developed before the end of the year)</i>	<b>AREA IMPROVEMENT ACTION PLAN</b> <i>(identify what specific actions will be taken by you and your line manager)</i>	<b>TIME FRAME</b> (when should this be completed)	<b>WHO IS RESPONSIBLE?</b>

# PERFORMANCE APPRAISAL




<b>We agree that the above staff review is correct and truthful. Both parties agree to work together to achieve the outcomes and goals set for the next 6-12 months.</b>			
<b>Employee Name and Surname</b>		<b>Date Signed</b>	
<b>Signature</b>			
<b>Line-Manager Name and Surname</b>		<b>Date Signed</b>	
<b>Signature</b>			