

APPRAISAL SKILLS COURSE

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APPRAISAL SKILLS: INTRODUCTION

The purpose of staff appraisal is to improve the company or organisation's performance through better staff management. A good appraisal system is a major factor in producing well-motivated staff who will contribute either directly or indirectly to the organisation's strategic objectives.

A manager operating a good appraisal system will be supported by well-motivated staff enabling the department to achieve targets and results, thereby enhancing his/her career prospects.

A good appraisal system will ensure that individual employees are developed to the best of their ability and are fully engaged in achieving their targets and aims.

OBJECTIVES: PRODUCTIVITY OR QUALITY?

Every organisation is different in terms of its culture and strategic intent; hence the number of different appraisal methods currently employed in companies and organisations. For example: one organisation's objective may be to improve productivity. The emphasis of the appraisal scheme will be on employee productivity and measures of this. In another organisation the key objective may be to improve service quality. The appraisal scheme will focus on the quality of the employees' work and displays of initiative to improve service quality.

Most line managers will have to implement an organisation-wide scheme and will have little choice in the type of appraisal process.

APPRAISAL BENEFITS

The aim of this course is to provide best practice guidance for managing and improving staff performance through an effective appraisal system.

An effectively operated appraisal system will deliver the following benefits:

ORGANISATIONAL

- (a) overall improved job performance through feedback and development plans;
- (b) a consistent method of assessing performance across the organisation;
- (c) all employees will have a clear understanding of the standards of performance that are expected of them;
- (d) improved communication between employees and their managers/directors;
- (e) standardised information about performance levels that can be used in manpower planning and succession planning;
- (f) a formal appraisal system is a key requirement of Investors in People and many other measures of quality service;

(g) formal appraisal records may be useful in demonstrating the quality (or lack) of an employee's work and the steps taken to assist them to improve, and may help to provide a defence against claims of discrimination or unfair dismissal.

THE EMPLOYER'S VIEWPOINT

Appraisals are carried out for a number of reasons. Well designed, they will help the organisation to determine:

- individual objectives
- how well objectives are being attained
- who should be promoted or transferred
- who should be considered for advancement
- who needs training and of what sort
- what jobs/tasks are actually being done
- the needs of employees.

THE EMPLOYEE'S VIEWPOINT

The appraisee, though accepting the above aims, may see the appraisal interview as having a different purpose. Unfortunately, the appraisal so often seems something to be feared. Many appraisees feel that it is carried out in order to find out who to dismiss. This should never be the case. If the appraisal interview is well designed, the individual should see it as:

- a career development exercise
- a way of assessing career and other wishes and needs, and how the organisation can provide them
- a way of clarifying the job (duties, objectives, etc)
- a way of becoming aware of their own potential, and how that potential can be fulfilled.

This last objective may lead to difficulties if the organisation cannot fulfil this potential, because the individual, if dissatisfied, may go elsewhere. But this can be beneficial for both parties; the appraisee may obtain greater job satisfaction by moving to another organisation, and the organisation doesn't want dissatisfied individuals on its staff. Such staff may perform poorly and demotivate others within the organisation.

The needs of the organisation and of the individual in appraisal need not be incompatible. If the individuals are happy working within the organisation, they are more likely to share some of that organisation's philosophy from the organisation's need to maximise profits, to everyone having the best chance to fulfil their personal potential.

Session 1

Welcome, introductions, aims and objectives

Introduce yourself; your training credentials and expertise on the particular subject. Explain any housekeeping rules, lunch, breaks and timings etc. Show delegates course objectives and agenda for the day. Discuss course guidelines and emphasise that participation is essential for a good course

Issue Manuals - ask delegates to write down any actions to be taken after the course on Action Plan page to rear of MANUAL

Slides 1-6

Session 2

Understanding the appraisal process

Ask the delegates what they think appraisals are for. List answers on flipchart and then refer to page 3 of the workbook 'Appraisal Skills: Introduction'

Lead the discussion emphasising the two distinct parts of the appraisal process; 1, reviewing past performance and 2. setting future objectives

Slides 7-11

Benefits Of.....

Ask group for their ideas on why appraisals are important. Ask them (in groups of 2) to take 5 minutes to discuss and write down the benefits of the appraisal to 1. the organisation 2. their respective departments and 3. their staff. Discuss the answers given.

Explain that it is important that the manager is positive and enthusiastic about the appraisal process as the team will take their lead from the manager. Ask them next to spend 5 minutes role-playing taking to one of their team explaining the benefits of the appraisal. Discuss the role-plays and how they felt about talking about benefits.

Pitfalls.....

Ask delegates their views about the appraisal process. Explain that they may have valid concerns about the process. Address likely concerns of the delegates - 'this all takes too long.....I haven't got the time.....etc'. Read pages 5 and 6 'Appraisal; The Business Risks' and discuss how these can be solved if the appraisal process is 'seen' to be adopted throughout the organisation.

Slides 12-14