

Appraisal Summer 2020: Guidance for Appraiser

During this appraisal period, it's important to remember the impact that the current pandemic has had, and is continuing to have, on all of us.

With this in mind, please consider the below when you arrange appraisal meetings over this summer.

General Points

The appraisal discussion gives the appraiser and appraisee the **opportunity for a clear and focussed discussion** about the coming year and beyond to help bring some clarity, direction and reassurance for both parties.

The relevance and timeframe of **objectives should be reviewed** and, if necessary, revised during regular (for example, quarterly) meetings.

During this summer you may wish to take a **'light touch' approach**. Adding notes to the e-appraisal system can help as it keeps a shared record but the quality of the conversation is the most important aspect.

As always, approach these conversations with kindness and empathy for your appraisee's circumstances. Avoid comparing your colleagues to each other in terms of how much workload they 'should' be able to take on.

Everyone is doing their best to manage work and personal commitments during this challenging period and many will not be able to work to full capacity for a number of reasons e.g. caring responsibilities, illness, mental health difficulties, financial worries, as well as challenges relating to the suitability of their current working environment.

Our [Working Flexibly when you have Caring or Other Significant Responsibilities](#) guidance will be helpful for many appraisees.

Appraisals are intended to be a **series of conversations** which take place over the course of the year, to be formally recorded on the e-appraisal system over the summer. It is a cycle, not a single annual meeting.

- Our [virtual meeting guidance](#) advises online meetings should be no longer than 45 minutes so please do keep to this wherever possible. It may well be that you will need to split up the topics below into separate meetings.

Objectives

Looking back - reviewing past objectives:

Remember to focus on the whole year, spend time celebrating successes and thinking about what made them go well. Consider that objectives set for the year 2019-20 may not have been met, or fully met, for reasons **outside the control of the appraisee**.

Some staff may not have been able to access the resources or people they need; some may have had a change in personal commitments/circumstances (for example, taking on additional caring responsibilities, illness, mental health difficulties); new projects and ways of working may have been introduced which have taken priority.

Review progress towards objectives realistically and pragmatically, taking these factors into consideration. Be prepared to discuss extensions to timescales into the 2020/21 period, or possibly removing objectives, which are no longer relevant or are no longer a priority. It would also be good to recognise peoples achievements in unexpected work e.g. getting teaching online.

Looking ahead - setting future objectives:

Focus on priority objectives. Ensure your team members are clear how their work contributes to delivery of the [Strategy 2030](#), a sense of purpose is important.

- Keep in mind that the **current circumstances are always changing**. However, time spent discussing plans and different scenarios can help you more easily reprioritise and adapt.

- Check with your staff that they are **clear about the expectations/outcomes/deliverables** that are required, while understanding that these are not set in stone, and may need to change in the future. Keep expectations realistic during this challenging time.

Career and Development Planning

- Consider what development might be needed **specific to the current situation**, e.g. Microsoft Teams, SharePoint, QMplus, teaching online
- If the appraisee's **workload has reduced** by having to work from home, are there opportunities for learning?
- Keep in mind that some individuals can struggle to take on new information and skills during periods of high stress such as this; therefore, you **may need to revisit this conversation later in the year**.

Appraisals should include some discussion of **longer-term career plans**, and your appraisee(s) may wish to engage actively in this part of the conversation.

However, some colleagues will naturally find it difficult to think about the future when the present moment can feel uncertain. Therefore, elements of this discussion could be **delayed if your appraisee doesn't feel ready to have this conversation**.

Resources & Support

Managers have a responsibility to ensure that their staff have the resources and support they need in order to meet their objectives, so this is a vital part of the appraisal conversation. Consider:

- **Wellbeing** is more important now than ever. Be prepared to direct appraisees towards resources such as the [Employee Assistance Programme](#), [Temporary remote working pages](#), and [Staff Wellbeing](#) pages. You can also be a source of support, just by being prepared to listen actively to your colleagues' concerns.

- Other questions you might want to explore with your appraisee:
 - Do you feel you have support/resources you can access?
 - Do you need to work more flexibly?
 - Do you have skills/confidence/support to be able to question expectations?
 - Do you have confidence that you can respond constructively to change?
 - Do you feel you have autonomy/control over how you meet objectives? If not, how would you like to be different?
 - What suggestions do you have for team communication, so you have the right information to do your job?