

Actus Appraisal Template



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Please note that this is a sample of a traditional annual appraisal template for guidance. Most businesses are now moving to more frequent, year-round conversations supported by software. Please get in touch with us at Actus if you would like guidance on how to make your appraisal process more effective. Visit: www.actus.co.uk.

Name:	Manager:
Role:	Date of meeting:

Objectives & comments on achievement to date	
Individual's comments	Manager's comments
<p>Objective 1:</p> <p>Milestones:</p>	
<p>Comments To what extent was it fully achieved? Were all milestones achieved? Did you meet all deadlines? Performance rating (if relevant):</p>	
<p>Objective 2:</p> <p>Milestones:</p>	
<p>Comments To what extent was it fully achieved? Were all milestones achieved? Did you meet all deadlines? Performance rating (if relevant):</p>	
<p>Objective 3:</p> <p>Milestones:</p>	
<p>Comments To what extent was it fully achieved? Were all milestones achieved? Did you meet all deadlines? Performance rating (if relevant):</p>	

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To what extent are you meeting the requirements of your job role? Refer to job description/role profile and update if needed	
Individual's comments	Manager's comments
What were you particularly proud of and what challenges did you overcome? Refer to last year's appraisal and notes from 1:1 meetings	
Individual's comments	Manager's comments

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Key Competencies/Behaviours that meet company values

Reflect on your performance over the last 12 months. Please give examples of how you have performed over the last year in these key areas of your role

Key Competency	Performance

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Rating		
Highly Effective		Performing against job role, objectives and behaviours and. Exceeds required standards and consistently performs in a thorough proficient manner beyond normal expectations.
Achieving		Achieves required objectives and standards of performance and meets all the normal expectations of the job.
Developing		A contribution which is stronger in some aspects of the job than others, where most objectives are met although there are some areas for development.
Basic		A contribution which on the whole meets the basic standards required although a number of objectives are not met and there is clearly room for improvement in several definable areas.

New Objectives and Projects	
Description	To be completed by

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Training and Development - needs What training or development may be needed to support future performance			
Learning needs specific to your role	How will it improve your performance and knowledge? Manager and individual to agree objectives or desired outcomes.	What method of delivery is required: Shadowing, coaching, mentoring, internal delivery (please state who to deliver), external provider required.	Timescale (for completion)
Development Aspirations including self-study	What / Where are the gaps in your knowledge / experience / skills?	Please consider what method of delivery is required: as above.	Desired Timescale

Signed:	Date:	(Manager)
Signed:	Date:	(Individual)

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Manager's Comments

Signed Manager:

Date:

Individual's Comments

Signed Individual:

Date:

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