

Staff performance and development procedure

The aim of the appraisal process is to facilitate the achievement of agreed personal professional improvement goals, as drafted by the appraisee. The relationship between an appraiser and appraisee is therefore one of feedback, discussion, clarification, and support. The relationship between an appraisee and partnered colleague is one of exploration, definition, prioritisation, refinement, resource identification, achievement, and celebration.

The appraisee is responsible for drafting and executing a professional research and development plan to achieve the improvement goals. The appraiser is responsible for ensuring that improvement goals are SMART, ratifying the improvement plan and facilitating progress by offering encouragement, support, and synergetic relationships across the staff.

The process

Action	By whom
Assign appraisers from the leadership team	Principal
Conduct training sessions for appraisers	Principal
Conduct information sessions for appraisees	Principal
Conduct classroom observations	Appraiser
Provide feedback to the appraisee	Appraiser
Identify improvement goals <ul style="list-style-type: none"> • Partner with a colleague • Review last year's outcomes • Draft goals in the light of the current context 	Appraisee Appraisee & colleague Appraisee & colleague
Create an action plan to achieve the goals	Appraisee
Check the action plan for quality assurance	Appraiser
Formally approve the action plan	Principal
Implement the plan	Appraisee
Regularly meet to monitor progress	Appraiser with appraisee
Conduct a mid-process review	Appraiser with appraisee
Refine goals as needed	Appraiser with appraisee
Regularly meet to monitor progress	Appraiser and appraisee
Conduct an end of process review	Appraiser with appraisee
Write a draft appraisal report	Appraisee
Refine the appraisal report	Appraisee & colleague
Formally approve the appraisal report	Appraiser
Meet with the principal to report outcomes, gain feedback and discuss future intentions	Appraisee

Performance and development plan, timeline example (southern hemisphere)

Activity	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec
Assign & train appraisers				■								
Appraisee information sessions				■								
Classroom observations					■							
Identify improvement goals												
• Appraiser feedback meeting					■							
• Partner with a colleague					■							
• Review last year's outcomes						■						
• Draft goals						■						
Develop the development action plan						■						
Gain formal approval						■						
Implement the plans						■	■	■	■	■		
Mid-process review								■				
End of process review									■	■		
Write up report										■		
Review & ratify the report										■	■	
Meeting with principal to report outcomes											■	■