



CHURCH OF SCOTLAND

Ministries Council

STAFF PERFORMANCE APPRAISAL AND DEVELOPMENT

Appraisee Guidance Notes – For Completion of Pre -Appraisal Form

1. What is an Appraisal?

- A confidential discussion between the appraisee and appraiser.
- Two way process based on self-assessment.
- An opportunity to give and receive feedback.
- An opportunity for you to focus on the tasks you are good at and not so good at.
- A chance for you to agree realistic targets and objectives: operational and personal.
- An opportunity for you to link your development to your Council/Department's aims and objectives.

2. Appraisal Meeting

- Agree a date and venue with your appraiser.
- Remember it is your responsibility to plan and prepare.
- Review your previous Review form (this will not apply on your first staff appraisal).
- Use the Pre-Appraisal form as a preparation tool in preparing for your appraisal meeting. (A copy of this form can be downloaded from the Church of Scotland Extranet Site, Ministries Council/Downloads and Resources area). In particular spend some time reviewing your job description and thinking about your role, think ahead about what development you would need and prepare some SMART objectives.
- The appraisal discussion will be based on the headings on the Pre-Appraisal form.
- A Review form will be completed by the appraiser outlining the agreed discussion and action points and will be forwarded to you for signature. Both parties retain a copy and a copy is sent to the Ministries Council.

3. Self-Appraisal Form

The self-appraisal form has been split into nine areas as follows:

Section 1 – Main Responsibilities

Briefly list the main responsibilities of your job and the approximate percentage of time spent on each over the year as a whole. Try to list no more than four to six aspects. It is always worth starting an appraisal discussion by checking that you and the appraiser have the same understanding of what the job entails; it is very easy for it to have changed without one or both parties fully appreciating the fact.

Section 2 – Assessment of Objectives

You need to look back at the last year's Review form and confirm the objectives agreed. For each agreed objective identify which, *from your point of view*, have been (a) exceeded, (b) met as required, and (c) not achieved. Explain why you have assessed them in any particular category.

Section 3 – Achievements

What do you feel you have done particularly well *by your own standards* over the last year and why do you feel that way? This may not be a major area of work, simply something you feel you have done well. It is important here to recognise that you are being invited to assess yourself by your own standards and not to compare yourself with others.

Section 4 – Potential improvement Areas

What do you feel you have done least well *by your own standards* over the last year and why do you feel that way? Remember to be true to yourself – this is designed to help and move forward, not to criticise!

Section 5 – Additional Steps

To help improve your effectiveness in the job still further, what additional steps do you feel could be taken by: -

- (a) You;
- (b) Your immediate supervisor; or
- (c) Your Kirk Session/Presbytery; or
- (d) The Ministries Council?

Make your suggestions as realistic and practical as possible. If you have no suggestions, please leave this section blank.

Section 6 – Work Objectives

What do you consider to be your *main objectives* for the next 12 months? List four or five. When listing your main objectives for the period ahead consider how you would like to measure your success in achieving them; they will be reviewed again at the next appraisal. The objectives should reflect performance development rather than simply routine work. In framing them, consider the wider perspective of the needs of your particular situation.

Setting objectives:

The appraisee should complete this section with the appraiser. Prior to the meeting both appraisee and appraiser should have considered personal and job objectives.

As the appraisee you should consider the following:

- The objectives should relate to the Kirk Session or Presbytery's objectives
- The objectives used are SMART:

Specific
Measurable
Achievable
Realistic
Timely

An example of a SMART objective is:

- *To undertake a review and make recommendations for improvement to the pastoral visiting rota by June 2010.*

The appraiser and appraisee must agree a timescale for all objectives set.

Section 7 – Changes in Responsibilities

What changes, if any, in your duties and responsibilities would you like to see to make your role more effective? Again it is important to be realistic in this section. If you have no changes, please leave this section blank. The appraiser may, of course, have some suggestions to make. You may also wish to discuss any changes, which you feel are relevant to your current job description in this section. Please remember that any significant changes to the job description must be made in consultation with the Kirk Session/Presbytery and Ministries Council.

Section 8 – Learning and Development

This section deals with learning and development. In thinking about your needs in this area, look back at the strengths you identified in Section 3 – how can these be capitalised on? How can the less successful aspects of your performance that you mentioned be managed through changes in job content, through training, or by other means? Will any changes in the demands made on you in the near future require that some steps be taken now to equip you to deal with them?

There are a number of ways in which employee development should be undertaken and can include any of the following:

Attending meetings, guided reading, delegation, working on a particular project, work shadowing, open learning, computer based training, attending seminars and conferences, working groups, coaching, training sessions and further education.

Section 9 – Additional Discussion Areas

Is there anything else you would like to discuss during this process?

4. Mid Year Review

The appraiser will meet with the appraisee approximately six months after the initial meeting. This meeting is to review the objectives, discuss progress, identify any new objectives and agree timescales. This will also give the appraiser and appraisee an opportunity to discuss any objectives that may have become obsolete.

5. Basic Guidelines for the Appraisal – Appraisee:

- Listen properly & actively
- Be prepared
- Positive body language – do not slump and cross your arms
- Look interested – if you are not why should the appraiser be!
- Stay focussed
- Test your understanding – ask questions and repeat

6. Summary

The agenda for the appraisal interview will be based on the headings of the Pre-Appraisal form, so the starting point for the whole discussion will be *your* ideas and perceptions

(though the appraiser will obviously contribute his or her views too). This means that the major responsibility for making the appraisal a successful and effective vehicle for constructive action will be yours. The more thought and preparation you have done beforehand, the more you and the Church as a whole will get out of it.