

# GUIDANCE FOR QUAKER AREA MEETINGS ON UNDERTAKING AN ANNUAL APPRAISAL

## 1. Before the meeting

Consider the employee's work since the last appraisal, consulting where appropriate with others who have responsibility for any aspect of the employee's work.

Think carefully about the areas in the form (see the example appraisal form in the 'employers' section of the Quaker website available at [www.quaker.org.uk/employers](http://www.quaker.org.uk/employers)) and make notes on the form. Remember these are your initial thoughts and you need to hear what the employee says first, before confirming your view about any area.

Review last year's appraisal form and notes of any meetings held during the year.

Prepare the room and ensure that you are not interrupted.

Make sure you are in a relaxed and open frame of mind.

## 2. During the meeting

Encourage open communication – arrange seating informally. If possible, don't sit with a desk between you.

Set the scene for the meeting and explain what will happen during the meeting.

Clear day to day issues before moving on to a wider picture.

Encourage the employee to talk – ask them their views on each area before giving your own.

Use open ended questions and encourage reflection.

Listen.

Stick to facts and try to give specific examples.

Praise work well done and ensure feedback is balanced.

Discuss where improvements are required and how they can be achieved.

With difficult feedback, concentrate on the facts (not 'I don't think you are motivated', but 'I am disappointed that you did not achieve xx on yy date').

Verbally summarise the notes you are taking.

If the employee has a disability, discuss how adjustments are working and whether any further adjustments need to be considered. For further information about your obligations under the Equality Act 2010, see the 'Employment, Self-employment and Volunteer Resource for Quaker Employers', available on the Quaker website.

Discuss what the individual wants from the job and enjoys in the job.

If the employee resides in Meeting House accommodation, remind the employee that the accommodation is tied to the job. Make sure that they have a realistic plan for accommodation in the future. Be sensitive in your discussions – it is important to check this once per year, but be careful not to give any impression that you are suggesting that the employee should 'move on'.

### **3. After the meeting**

Finalise the appraisal form as soon as possible and provide a copy to the employee.

If the employee disagrees with what you have recorded on the form, listen carefully and try and come to an agreement. You should be reasonable in your expectations; likewise, employees are expected to follow reasonable management instructions, even if they disagree with them.

Keep a copy of the form in a confidential file.