



Staff Assessment and Appraisal Policy

Purpose

The Organisation operates a staff appraisal system. Details are attached and copies can be obtained from the PIP Administrator and PIP staff file. The purpose of the system is to ensure review, assessment, and planning of staff members' and teams' functioning.

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1. PIP Appraisal Form

1. Probationary period

After one month in post, the induction period will be reviewed by the Line Manager and Post Holder and plans made for the next two months. After three months in post a formal staff appraisal will be undertaken by the post holder and line manager to assess job performance and to determine supervision and training needs. After five months in post, job performance and suitability for the job will again be reviewed by the post holder and line manager in order to anticipate the probable outcome of the six-month probationary period. On completion of the initial probationary period, a meeting between the line manager and post holder will be held to review progress. Following this, the appointment will or will not be confirmed.

If an extension of the probationary period is considered necessary, the Line Manager will inform the post holder as soon as possible.

The confirmation of appointment will be made in writing. If appointment is not confirmed or if the probationary period is to be extended, written reasons will be given. Where the probationary period is extended, a time scale for improvement will be set (maximum period being 3 months) and, where appropriate, additional training and support given. If at the end of the review period performance is still unsatisfactory, employment will be terminated.

Staff transferred within the organisation are subject to the probationary periods set out above.

2. Annual appraisal

After twelve months in post, and annually thereafter, the Post Holder and Line Manager must complete a full staff appraisal. This will involve an assessment of job performance, reviewing past and planning future supervision and training, and setting goals for the next 12 months.

3. Review and Updating of Policy and Procedures

This Staff Assessment and Appraisal Policy detailed above was agreed and minuted at a meeting of the Board of Trustees on:

Approved by: Julie Newton-Smith Chair of Trustees	Signed:	Date: Review: July 2018
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Appendix 1

PIP Appraisal Form

Staff name: _____

Manager: _____

Role: _____

Date: _____

The purpose of appraisal structure is to address the development of the staff member in line with their own personal ambitions and organisational strategy. It is a chance to set a 'north' for the member of staff they can work on with the line manager over the course of the next year.

Whilst the organisation will make every effort to help the staff member develop in line with their stated aspirations, this can only be done to the extent it fits with the organisational role, values, strategy and Resources.

Reviewing the previous year:

What have the achievements and challenges of the past year been, and what have you learnt?

Has anything hindered your improvement and what could have been done to prevent this?

Previous appraisal goals – review

Goal	Comments

Going forward

Examples of possible strengths / development areas:

Examples of areas you could identify are as follows (this list isn't exhaustive - you can choose others):

- Professional expertise: mental health knowledge, advocacy, clinical, counselling, service user involvement, housing knowledge, advice, working with employers, practical skills, finance, H&S, HR, IS
- Client support skills: motivation, personal planning, leading creative groups, delivering and tracking outcomes, identifying and organising move-on opportunities, maintaining boundaries
- Communication: presenting, selling, training, networking, influencing, campaigning, publicizing, writing skills, fundraising
- People skills: inspires trust, consistency, constructiveness, conflict resolution, coordination, peer support, assertiveness, negotiation, de-escalation
- Personal effectiveness: punctuality, reliability, thoroughness, organisation, planning, determination, numerical skills, self-aware, self-motivated, resilient, meets deadlines, goal orientated, analytical, copes with complexity
- Handling change and crises: identifies opportunities, copes under pressure, motivates/delivers change, project management
- Manager skills: motivating, supervising, staff development, business development, handling grievances, performance management, policy implementation
- External knowledge: aware of best practice, market and competitor knowledge, funding opportunities, understands political environment
- personal and professional ongoing development plans

Soft / Hard skills assessment

Soft skills are personality traits, social graces, communication, language, personal habits, friendliness, and optimism that characterise relationships with other people. Soft skills complement hard skills which are the occupational requirements of a job. Soft skills are personal attributes that enhance an individual's interactions, job performance and career prospects. Soft skills are interpersonal and broadly applicable and are not generally necessary for employment. Soft skills are an important part of an individual's contribution to the success of an organisation. Particularly organisations that deal with service users face-to-face are generally more successful if they train their staff to use these skills. Soft skills may be more important over the long term than occupational skills. Soft skills in a professional environment equal; better relationships and fostering alignment. Soft Skills are behavioral competencies. Also known as Interpersonal Skills, or people skills, they include communication skills, conflict resolution and negotiation, personal effectiveness, creative problem solving, strategic thinking, team building, influencing skills and selling skills, active and passive listening, hearing the unsaid, empathy, critical thinking (thinking about thinking) conceptualization, clarifying goals, examining assumptions, discerning hidden values, evaluating evidence, accomplishing actions, and assessing conclusions.

Being as specific as possible what steps do you need to take to achieve your goals for this year?

Goal	Action	Progress Marker	Timeline

Final Comments by Manager

Final Comments by Staff member

Signed (staff): _____

Signed (manager): _____