

Warwickshire Early Years Quality Standards and Safeguarding Team.

Example Appraisal Meeting Record Forms.



This resource has been developed to support all Early Years providers working with children aged from birth to five years, with a focus on good practice in relation to Appraisal.

Please note:

- It is responsibility of each early year's provider to decide upon their own policies /procedures for appraisal and record forms.
- The following forms are provided for **illustrative purposes only**. They should not be used in their entirety but may instead be used as a helpful starting point for providers to develop and shape their own forms.
- Before using any of the forms, time should be spent upon personalising the form for use in your own setting, so each form adopted is reflective of your settings aims for appraisal, your vision and values and tailored to your staff.
- Forms should also be reviewed regularly and updated accordingly.



Example A: Employee Appraisal Record Forms

The following form provides an example of an Employee Appraisal record form. Should you wish to adopt this form it is important that before using this form, time is spent personalising it for use in your own setting, so it reflective of your setting aims for appraisal, your vision, and values and tailored to your staff. Once personalised this form can then be used by the employee and the Manager during the appraisal meeting.

A self-reflection form **completed by the employee** may also be used within the meeting to support discussions.

Progress towards previous actions set:
Have the actions set at your last appraisal been met? If so, how?
If the agreed actions have not been met, what challenges or barriers were faced which have led to this? What support could be put in place to help you to meet the previously set actions?
Review of Roles and responsibilities:
Do you feel your current job description is reflective of your role and responsibilities? Are there any ways this could be strengthened or improved?
How effective do you feel you are in your role and ensuring the needs of children are met?
What aspects of work have you as an employee enjoyed most and why?
What aspects of work have you as an employee enjoyed the least and why? Are there any recommendations you could make to address the aspects you have enjoyed least?
Review of Performance since the last appraisal:
What do you feel are your key areas of strength?
What do you feel are your main achievements in your role since your last appraisal?
What have been the key areas of learning within your role this year?
What steps have you taken to develop your skills, knowledge, and expertise since your last appraisal?

Self-Reflections: Future goals, target setting and support.

What are your future goals, both personally and professionally for the next year?

Is there anything that we could do to help you meet these goals and perform more effectively?

Is there any training you would like to access or any further support you would like to support you in your role?

Areas of further discussion and future actions to work towards: *(please record these here and note any support required)*

Managers review of the employee's performance

Area	Rating <i>1-3 being poor, 4-6 being satisfactory, 7-9 good, 10 Excellent</i>	Managers comments
Attendance		
Time Keeping		
Interactions with children		
Interactions with co-workers		
Partnership with parents		
Attendance to staff meetings, training days or completing CPD		
Ability to adhere to policies and procedures, (including the ability to follow direction from leaders. Managers Room leaders)		

Declaration

Have there been any changes in the employees' circumstances since their last appraisal which may affect their suitability to work with children: (Yes/ No)

If yes, please record:

Agreed actions

Employee's signature:		Date:	
Employers signature:		Date:	

Example B: Employee Appraisal Record Form

The following form provides an example of an Employee Appraisal record form. Should you wish to adopt this form it is important that before using this form, time is spent personalising it for use in your own setting, so it reflective of your setting aims for appraisal, your vision, and values and tailored to your staff. Once personalised this form can then be used by the employee and the Manager during the appraisal meeting.

A self-reflection form **completed by the employee** may also be used within the meeting to support discussions.

Name:	Role:
Date of meeting:	Time:
Actions from previous appraisal: (include below) <ul style="list-style-type: none">••	
Review of progress towards previous actions set:	
Have the actions set at your last appraisal been met? If so, how?	
If the agreed actions have not been met, what challenges or barriers were faced which have led to this? What support could be put in place to help you to meet the previously set actions?	
What do you consider to be your main achievements in your role since your last appraisal?	
What are your key strengths?	
Have you encountered any challenges in fulfilling your role this year? Have these been overcome? If so, how? If not, what could be done to help with this?	
What do you consider to be your main areas for development? Are there any skills/ areas of work you feel you need to improve the most and why?	
Which aspects of your job role do you like the most? Why?	
Which aspects of your job role do you dislike the most? Why? Is there any thing can be done to help make this aspects more enjoyable?	

Self-Reflection: Future goals, target setting and support.

What are your personal goals for the next appraisal period?

Is anything we could do to help you meet the goals you have shared?

Are there any areas / issues that have not been discussed or addressed? *Use the space below to note these and any related discussions.*

Managers review of the employee's performance:

Area	Excellent	Good	Average	Poor	Comments
Attendance & punctuality					
Skills and Knowledge to fulfil my role in supporting children's learning and development					
Understanding of safeguarding and child protection					
Partnership with parents					
Team player					
Ability to use initiative.					
Responsibility					
Organisation					
Attitude					

Declaration:

Has anything changed in your circumstances since your last appraisal?

Agreed actions

•

Employee's signature:

Date:

Employers signature:

Date

Example C: Employee Appraisal Record Form

The following form provides an example of an Employee Appraisal record form. Should you wish to adopt this form it is important that before using this form, time is spent personalising it for use in your own setting, so it reflective of your setting aims for appraisal, your vision, and values and tailored to your staff. Once personalised this form can then be used by the employee and the Manager during the appraisal meeting.

A self-reflection form **completed by the employee** may also be used within the meeting to support discussions.

Name:	Role:
Date of meeting:	Time:
Actions from previous appraisal: (include below) <ul style="list-style-type: none">••	
Self-reflection: Performance	
Discussion points to consider: <ul style="list-style-type: none">• Achievements since last appraisal.• Key strengths.• Areas for development.• Aspects of your role which are enjoyable.• Aspects of the role which are challenging.	Discussion Notes: <i>Please use this space to add /record discussions and evidence shared.</i>
Self-Reflection: Future goals, target setting and support.	
Points to consider: <ul style="list-style-type: none">• Personal goals for the next appraisal period.• Identified support to help the employee meet the goals shared.• Further training required.	Discussion Notes: <i>Please use this space to add / record discussions and evidence shared.</i>

Self-reflection: Other areas					
Points to consider: <ul style="list-style-type: none"> Any other areas / issues that have not been addressed. 			Discussion Notes: Please use this space to add self-reflection notes.		
	Excellent	Good	Average	Poor	Comments
Attendance & punctuality.					
Skills and Knowledge to fulfil my role in supporting children's learning and development.					
Understanding of safeguarding and child protection.					
Partnership with parents.					
Team player.					
Ability to use initiative.					
Responsibility.					
Organisation.					
Declaration:					
Has anything changed in the employees' circumstances since their last appraisal?					
Agreed actions:					
Employee's signature:			Date:		
Employers signature:			Date		

Example D: Employee Appraisal Record Form

The following form provides a final example of an Employee Appraisal record form. Should you wish to adopt this form it is important that before using this form, time is spent personalising it for use in your own setting, so it reflective of your setting aims for appraisal, your vision, and values and tailored to your staff. Once personalised this form can then be used by the employee and the Manager during the appraisal meeting.

A self-reflection form completed by the employee may also be used within the meeting to support discussions.

Name:	Role:
Date of meeting:	Time:
Actions from previous appraisal: (include below) <ul style="list-style-type: none">••	
Review	
What was particularly successful during this review period?	
What could have worked better and why?	
How can things be improved?	
Development	
Set specific objectives for next year and agree these during the review meeting.	
What support might you need to complete these objectives and from who?	
What can we as an organisation do to help you fulfil your job role? How can we improve how we work with you?	
How can we as an organisation improve the job itself?	
How can we improve the effectiveness of our team?	

Training, development and learning plan

What training, development and learning have been undertaken in the period of review?

What was the key learning?

How did this impact on the job and how have you implemented this into the environment / practice?

List training, development and learning goals for next year. Identify the learning goals first and then consider the different ways in which this learning may be achieved.

Managers general comments

Staff member general comments

Declaration:

Has anything changed in the employees' circumstances since their last appraisal?

Agreed actions:

Employee's signature:

Date:

Employers signature:

Date