<table>
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<tr>
<th>Task</th>
<th>Activity</th>
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| **Informal Appraisal**  
*Your Department*  
*Business Centre* | ✅ Written report  
Re: informal and formal appraisal  
✅ Online Seminar  
✅ Email activities |

Callum has organised a number of activities to help you establish grounding with formal and informal appraisal as well as making available numerous reading resources in his office. We will be monitoring your participation in the activities which we feel will enhance your ability to prepare and submit a short written report that:

- states three ways in which you have offered positive feedback to a colleague on the job
- explains the ways you or your manager monitor the performance of staff on a daily basis
- describes one example when you offered informal constructive feedback to a colleague regarding unsatisfactory work performance
- describes one example when you received informal constructive feedback from a boss or colleague about unsatisfactory work performance
- describes the type or types of appraisal system(s) used in your workplace; explain how you feel about these appraisal(s)

Your department/workplace should provide you with the material for this report. If you have difficulties with this please contact Callum or myself.

We will be conducting our own informal appraisal of you by monitoring your participation in the Seminar and activities through out this unit.
Plan for a Performance Appraisal Interview
Your Department
Business Centre

Planning and documenting this process is important so Callum has organised a workshop for all Trainee Managers. There are Human Resource documents available to view in his filing cabinet which will help you participate in the workshop. This participation will be monitored by us to ensure you are following the HR guidelines.

Following the workshop you should prepare a checklist showing the matters that should be attended to when planning a PA interview. As you organise and conduct your appraisal interview you should tick off the items as you do them. Before enclosing this checklist in your Project Portfolio comment on anything you were not able to do; or anything unexpected you had to do.

Besides the preparation of documentation you need to prepare yourself to deliver your interview. To do this there is an extract of an appraisal interview in the staff lounge and a Mock Interview exercise arranged for you to participate in with other Trainee Managers. The noticeboard will have more information available on this.

- Negotiate to conduct a performance appraisal of a colleague
- Prepare a plan for the Appraisal Interview
- Decide on a Report form
- Analyse the Interview Extract
- Participate in the Mock Interview
<table>
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<tr>
<th>Conduct a Performance Appraisal Interview</th>
<th>Conduct a performance appraisal interview of a colleague under observation</th>
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<tbody>
<tr>
<td><strong>Your Department</strong></td>
<td>Document the appraisal interview</td>
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Conduct the performance appraisal interview with a senior person observing the process. Then,

- document the interview on the PA Report form
- ask the observer of your interview and your appraisee to sign their own copy of the guidelines to indicate if all aspects of the guidelines were addressed

These should be placed in your project portfolio together with a brief summation on your personal reflection on the delivery of the interview.
## Follow-up to PA Interview

*Your Department*

If the Performance Appraisal Interview is to be of full value you need to follow up with an Action Plan for your appraisee as part of, or attached to the PA Report form. Information on the Action Plans is provided in a fax from Callum.

In a written report:

- **Summarise the commitment(s) you have agreed to undertake.**
- **Explain how you intend to meet those commitments**
  - What action do you have to take
  - When?
  - Can you identify any possible barriers to meeting the commitments?
- **Describe briefly the policies/procedures/opportunities in place at your workplace for:**
  - Recognition & rewards
  - Coaching
  - Counselling
- **Explain how you complied with the legal, ethical and/or enterprise requirements during the planning and conduct of and the follow-up to the performance appraisal interview.** Include your personal reflections on your performance as an interviewer.

- Document and describe the proposed follow-up action
- Report on the success of the interview
- Report on compliance with all requirements during the whole appraisal process