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Click here to see an example of this template as a record.

Appraisal Template

As our system allows you to unpublish and modify records as many times as you need to, there is no need to have multiple templates for performance management documents. You can publish and unpublish whenever it is time for your next review.

You can also see a video on how to make this template via our webinar section. Help > Guides and Handouts > Webinars

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Headings – this helps you create sections within your templates and keep them organised. These headings will not be shown in reports.

Focus Areas

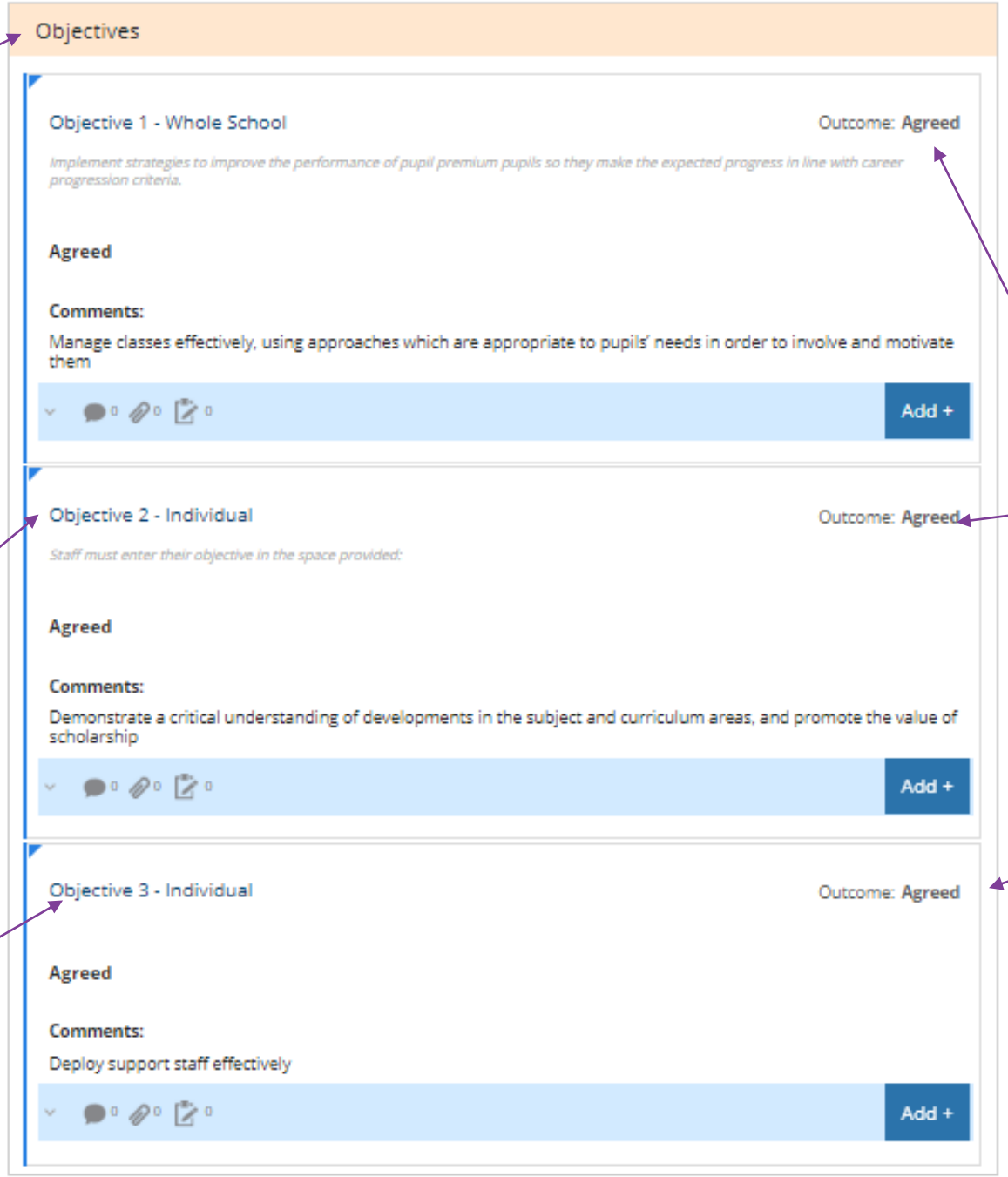
Objective 1 – Whole School

Objective 2 – Individual

Objective 3 - Individual

Focus Areas – These are the key points of your observation/meeting. If you are using outcome sets, these headings will be the rows within your tables. Outcome sets can only be linked to focus areas and this is what generates the data in reports. Any comments entered here will also pull through into the details report section.

A single focus area cannot have more than one outcome.



Outcome set
"1. Objectives Agreed?"

Outcomes:
Agreed
In Discussion
N/A

Outcome sets – these will form the columns within your reports.

They are bespoke to your own school set up and not limited to traditional Ofsted gradings. The name of your outcome sets (For Example, this one is called 1. Objectives Agreed?) Will be the name of your table within reports.

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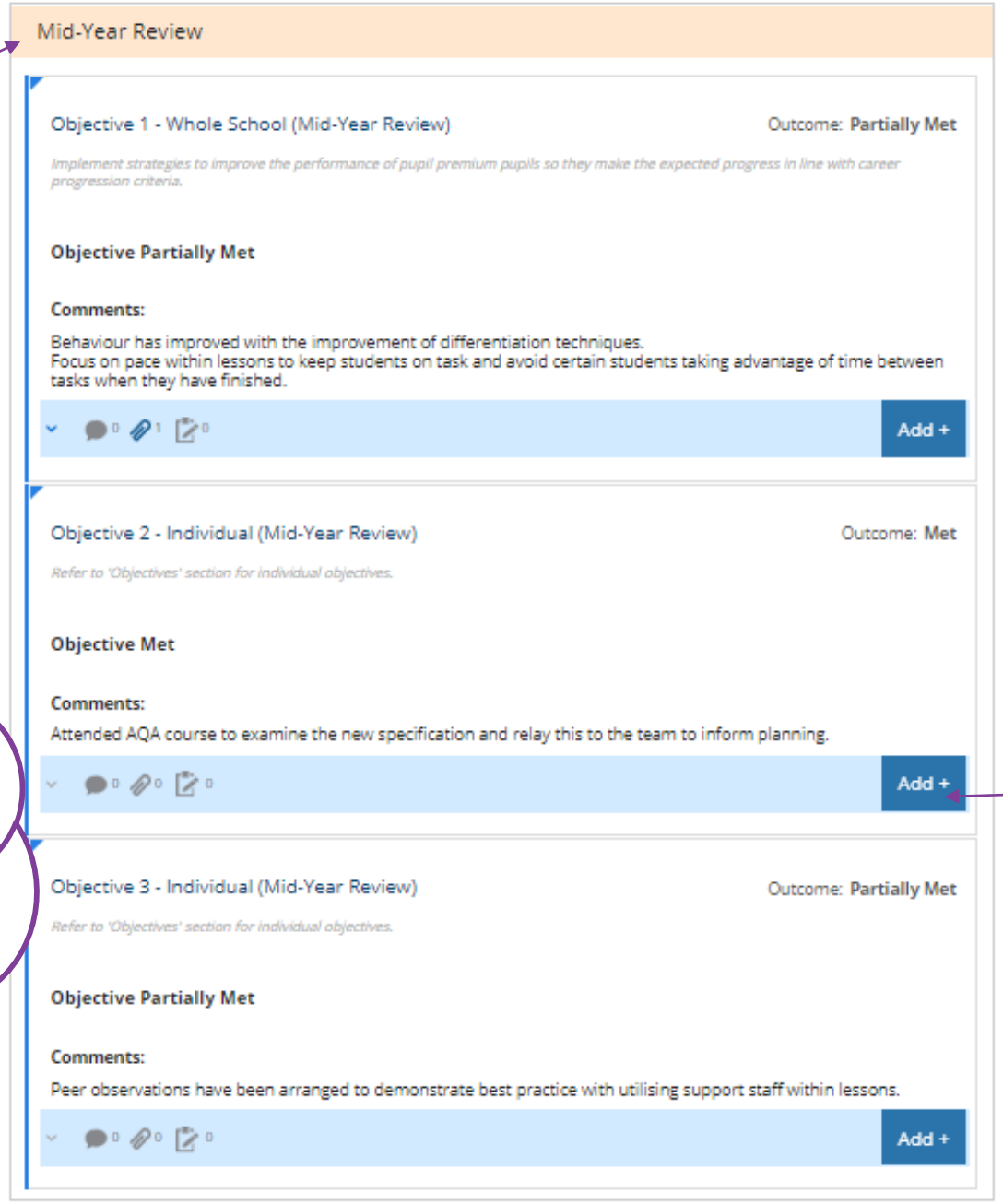
This appraisal templates has different headings to separate the appraisal review periods during the year – these can be completely customised based on your schools policies and procedures.



Outcome set
"2. Mid-Year Review"

Outcomes:
Met
Partially Met
Not Met
N/A

Focus Areas

Objective 1 – Whole School (Mid-Year Review)

Objective 2 – Individual (Mid-Year Review)

Objective 3 – Individual (Mid-Year Review)

Staff would be able to view their records and add reflections, evidence or actions to complete during each review period.

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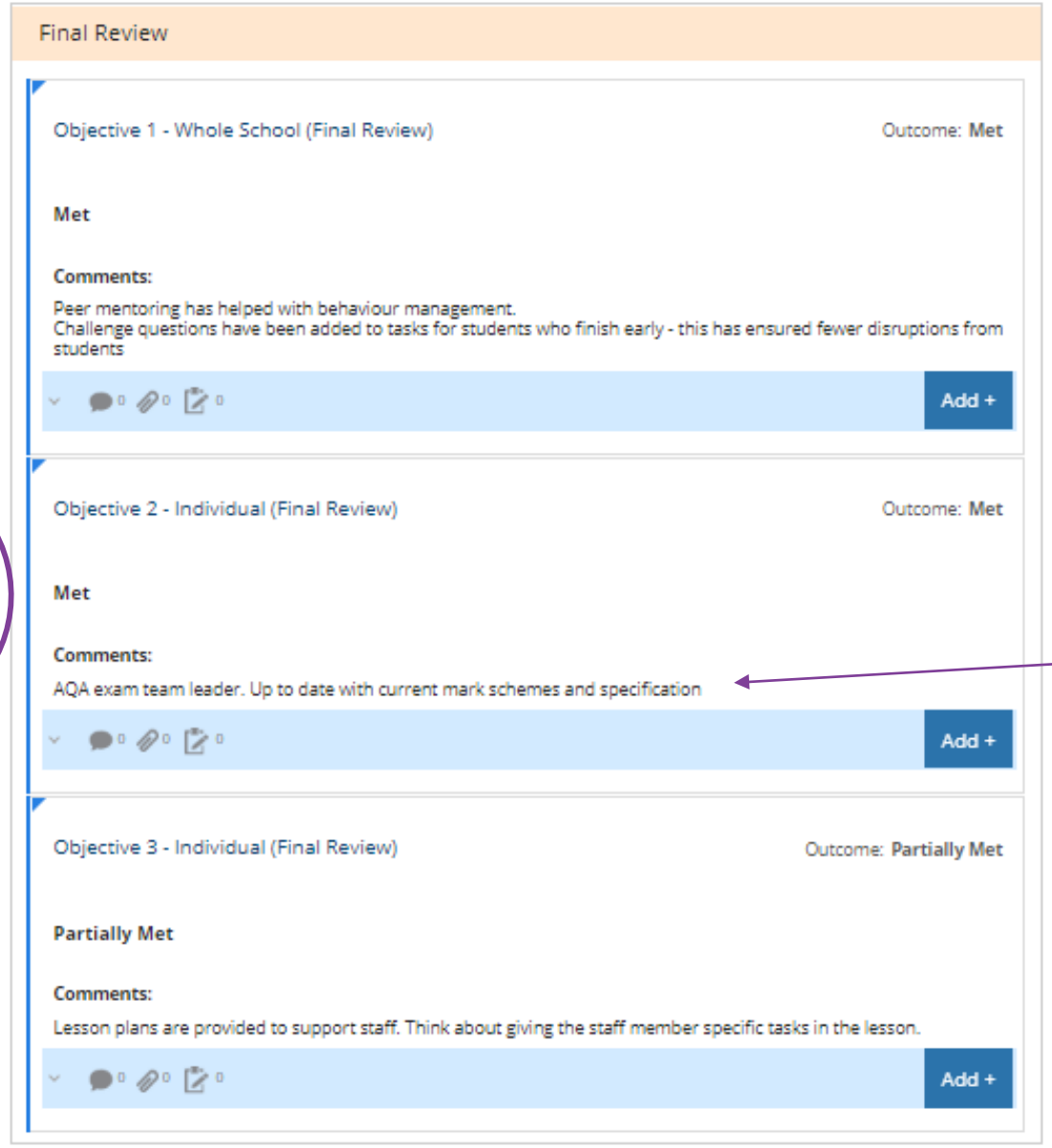
Focus Areas

Objective 1 – Whole School (Final Review)

Objective 2 – Individual (Final Review)

Objective 3 – Individual (Final Review)



Outcome set
"3. Final Review"

Outcomes:
Met
Partially Met
Not Met
N/A

Any comments entered will pull through into the details report. These can be exported if need be.

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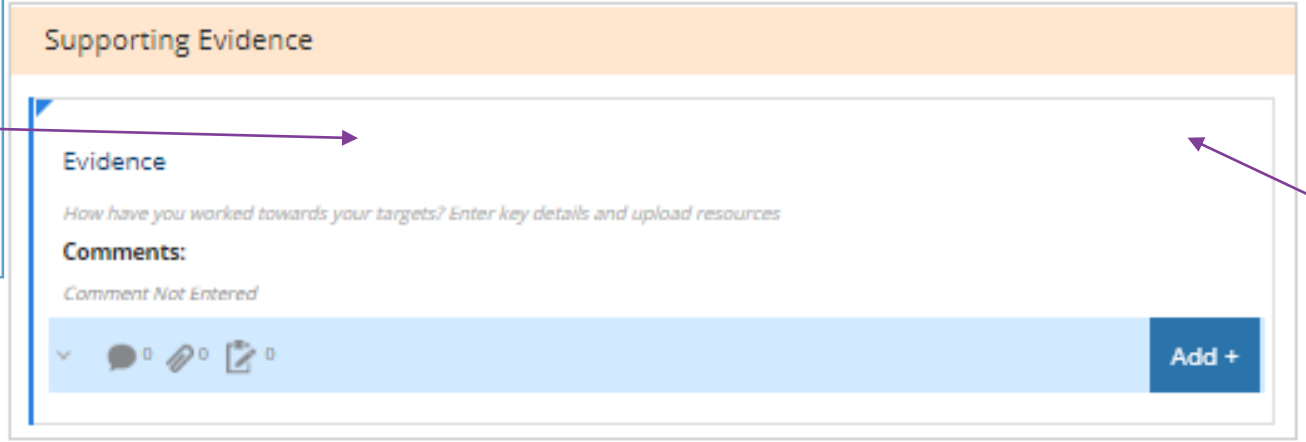
You don't always need a specific "Evidence" focus area – our system will allow you to "Add" resources, reflection and follow up actions onto any focus area. This allows staff to upload supporting evidence for their review and examples of class data and book marking.

Outcome set
"4. Pay Progression Recommended?"

Outcomes:
Yes
No

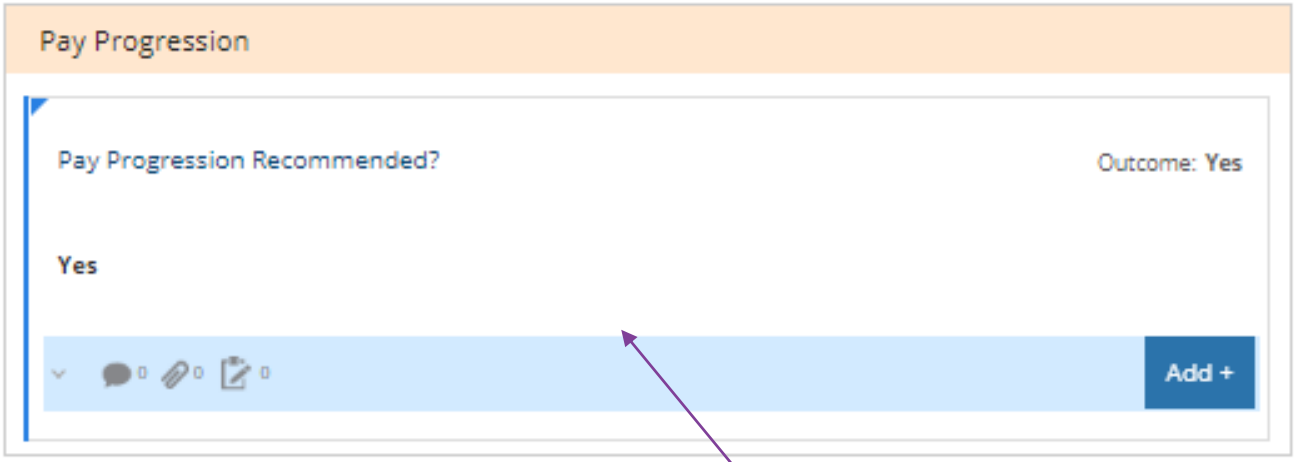


This focus area does not have an outcome set linked to it but the comments entered will pull through into the details reports.

Focus Areas

Evidence

Pay Progression Recommended?



This section allows employers to generate at-a-glance information in relation to employees pay progression. They are able to see it in a neat table and make their final judgements based on the collective staff data. Comments have been disabled for this focus area but you can choose to leave them on.

What would this look like in reports?

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Your outcome set name is the title of the chart

The Outcome values are the columns of your table.

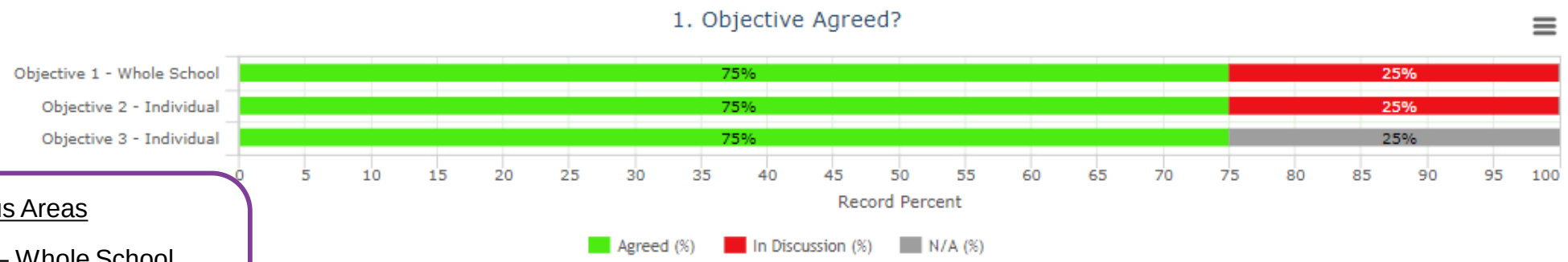
Outcome set
"1. Objectives Agreed?"

Outcomes:
Agreed
In Discussion
N/A

1. Objective Agreed?

Focus Area Name	Agreed (%)	In Discussion (%)	N/A (%)	Record Count
Objective 1 - Whole School	75.0	25.0	0.0	4
Objective 2 - Individual	75.0	25.0	0.0	4
Objective 3 - Individual	75.0	0.0	25.0	4
Total	9	2	1	
	0%		100%	

Focus areas are the rows of your table.



Focus Areas

Objective 1 – Whole School

Objective 2 – Individual

Objective 3 - Individual

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Having the separate outcomes allows for neater reports.

Focus Areas

Objective 1 – Whole School (Mid-Year Review)

Objective 2 – Individual (Mid-Year Review)

Objective 3 – Individual (Mid-Year Review)

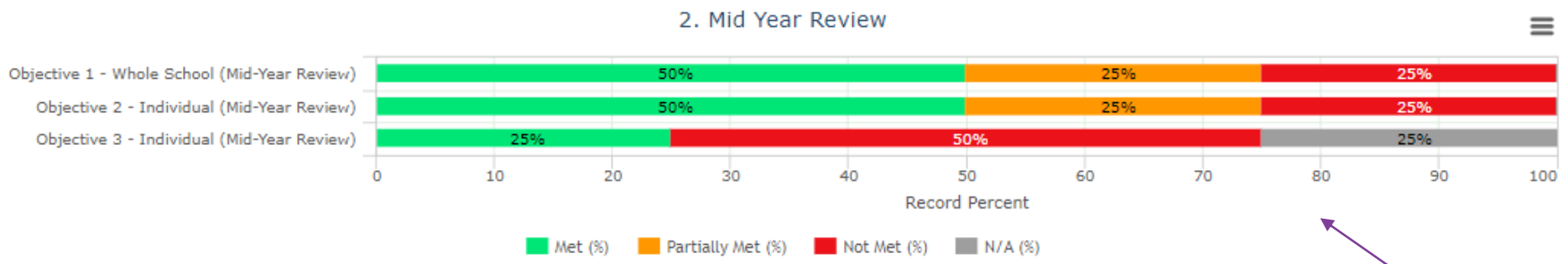
Outcome set
"2. Mid-Year Review"

Outcomes:
Met
Partially Met
Not Met
N/A

2. Mid Year Review

Focus Area Name	Met (%)	Partially Met (%)	Not Met (%)	N/A (%)	Record Count
Objective 1 - Whole School (Mid-Year Review)	50.0	25.0	25.0	0.0	4
Objective 2 - Individual (Mid-Year Review)	50.0	25.0	25.0	0.0	4
Objective 3 - Individual (Mid-Year Review)	25.0	0.0	50.0	25.0	4
Total	**5**	**2**	**4**	**1**	

0% 100%



Colours of outcomes can be changed

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Focus Areas

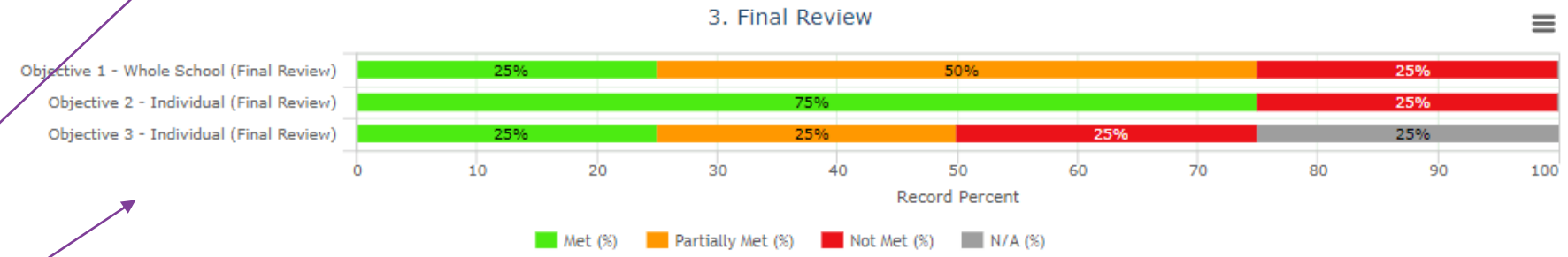
Objective 1 – Whole School (Final Review)

Objective 2 – Individual (Final Review)

Objective 3 – Individual (Final Review)

3. Final Review

Focus Area Name	Met (%)	Partially Met (%)	Not Met (%)	N/A (%)	Record Count
Objective 1 - Whole School (Final Review)	25.0	50.0	25.0	0.0	4
Objective 2 - Individual (Final Review)	75.0	0.0	25.0	0.0	4
Objective 3 - Individual (Final Review)	25.0	25.0	25.0	25.0	4
Total	5	3	3	1	
	0%			100%	



Outcome set
"3. Final Review"

Outcomes:
Met
Partially Met
Not Met
N/A

% and Charts can be toggles on and off

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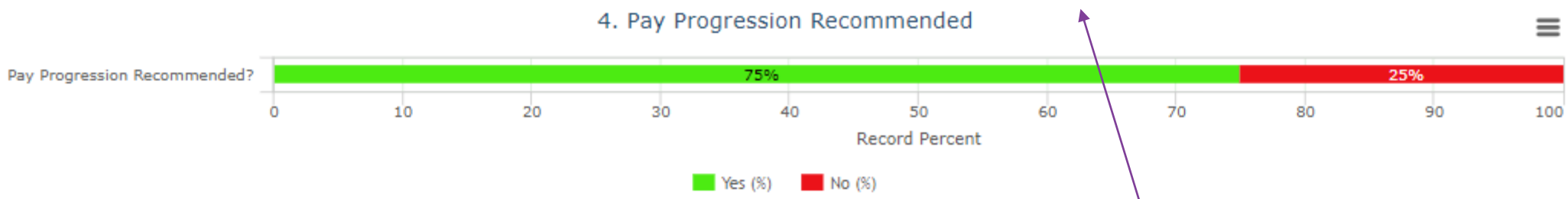
Outcome set
"4. Pay Progression Recommended?"

Outcomes:
Yes
No

4. Pay Progression Recommended

Focus Area Name	Yes (%)	No (%)	Record Count
Pay Progression Recommended?	75.0	25.0	4
Total	3	1	
	0%	100%	



This chart makes pay progression less of a headache. See your information in a simple chart. You can also "drill down" into the counts and focus area reports to get more detailed information