

Appraisal form template

There is no legal requirement to hold appraisals in the UK, but Acas says employers should conduct regular performance reviews and that it is a good idea to do them at least once a year. A good appraisal form has five parts: the employee's self-assessment, a review of last period's objectives, the manager's assessment against the role, objectives for the next period, and a development plan. Acas says to keep a written record of what is discussed and share it with the employee afterwards. Those records are also the evidence an employer needs if performance later becomes a capability issue.

Download the form ? PDF • one per person, per review

What should an appraisal form include? The template

The employee completes Parts 1 and 2 before the meeting. The manager drafts Part 3 beforehand and completes Parts 4 to 6 with the employee in the room.

Details

Name: [name]. Job title: [role]. Manager: [name]. Review period: [from] to [to]. Date of meeting: [date]. Date of last review: [date].

Part 1. Self-assessment (employee)

What are you most pleased with from this period, and why? What did not go as well as you wanted? What got in the way of doing your best work? What have you learned? What would you like to do more of, or less of, in the next period? Is there anything about your workload, hours or wellbeing you would like to discuss?

Part 2. Objectives from last period (employee, then manager)

For each objective: Objective: [text]. Measure agreed: [how success was to be judged]. Outcome: [achieved / partly achieved / not achieved / no longer relevant]. Evidence: [facts, figures, examples]. Employee comment: [text]. Manager comment: [text].

Part 3. Manager's assessment against the role

For each of [four to six] areas taken from the job description or competency framework, such as quality of work, reliability, working with others, customer focus and [role-specific skill]: Strengths shown, with an example: [text]. What to develop, with an example: [text]. Summary: [exceeds what the role requires / meets it / partly meets it / does not yet meet it].

Part 4. Objectives for the next period

[Three to five] objectives. For each: Objective: [specific outcome]. Measure: [how we will both know it is done]. Support or resources needed: [text]. Review date: [date]. Each objective should be within the employee's control, achievable in their contracted hours and linked to what the team is trying to do.

Part 5. Development plan

Development need: [skill or knowledge]. Action: [course, coaching, shadowing, project]. Who arranges it: [name]. By when: [date]. Longer-term aims the employee would like to work towards: [text].

Part 6. Summary and sign-off

Manager's overall summary: [text]. Employee's comments on the review: [text]. Any adjustments or support agreed: [text]. Signed by employee: [name, date] - signing confirms you have seen this record, not that you agree with all of it. Signed by manager: [name, date]. Copy given to employee on: [date]. Next review: [date].

Are appraisals a legal requirement?

No. The Equality and Human Rights Commission's guidance for employers says: "It is not a legal requirement for you to use a formal appraisal system." What Acas says is guidance, not law: "Employers should conduct regular performance reviews for anyone with the legal status of employee. It's a good idea to do them at least once a year."

The legal weight comes later. Poor performance is a potentially fair reason for dismissal, but Acas says "employers should support employees to improve first. Dismissal should be a last resort", and that the employer "must have evidence of" the employee's poor performance and "any steps taken to support them to improve". It gives as an example "records of regular, fair performance reviews showing consistent performance issues".

That evidence will matter to more employers soon. The qualifying period for unfair dismissal falls from two years to six months for dismissals from 1 January 2027, so an employee who is struggling in their first year will be able to challenge a dismissal that today they could not. See the six-month rule guide.

What makes a performance review fair?

- Judge against the job description and objectives agreed in advance - Standards the employee first hears about in the meeting
- Give an example for every rating - Adjectives with nothing behind them
- Cover the whole period - Reviewing only the last month
- Adjust objectives for part-time hours, family leave and disability-related absence - Marking someone down for time away that the law protects
- Write the record up and share it - A verbal review with nothing on file
- Raise problems when they happen - Saving criticism up for the annual meeting

Acas's own points are that "objectives should be fair and reflect the employee's usual tasks and workload", and on the record: "It's important to keep a written record of what is discussed. This should be shared with the employee afterwards."

How do you run the appraisal meeting?

- Give two weeks' notice and send the form, last year's objectives and the job description.
- Book an hour in private and do not move it. Rescheduling a review tells the person where it ranks.

- Let the employee go first. Their self-assessment sets the agenda and usually names the problems for you.
- No surprises. Anything critical should already have come up in a one-to-one. The guide to one-to-ones covers that habit.
- Agree the objectives together and write the measure down while you are both in the room.
- Send the completed form within a week, and put the review dates in both diaries.

What if the review shows serious underperformance?

The appraisal is not the place to start a formal process, and a poor rating is not a warning. If informal support has not worked, move to a structured plan with clear targets, support and a timescale, using the performance improvement plan template. Acas says that whatever procedure is used "must be in line with the Acas Code of Practice on disciplinary and grievance procedures". First decide whether the issue is ability or behaviour; capability vs conduct explains why it matters.

For the areas to assess in Part 3, a competency framework gives every manager the same yardstick, and a training needs analysis turns Part 5 into a plan for the whole team.

A free template from CoDash - codash.co.uk/templates. Edit it to match how your company actually works, and take advice on anything unusual.