

11.10: Presenting an Appraisal

Learning Outcomes

- Discuss how to present an appraisal



One of the best ways to ensure an effective—and legally defensible—appraisal is to prepare in advance. For a traditional annual appraisal, well in advance. In her Muse article “A First-Time Manager’s Guide to Performance Reviews,” Pepperdine University Career Center Director Amy Adams lays out a one year preparation plan. As Adams notes “Planning will help you deliver more comprehensive [read: effective] feedback.”^[1] An employee should never be blindsided by a review. If you’ve been providing feedback on a regular basis, the appraisal will be constructive or, on the downside, end in closure. Ongoing dialog also builds trust and a willingness to hear feedback as developmental coaching rather than a personal attack.

Here’s a step-by-step guide to presenting an appraisal:

1. Schedule an appraisal meeting in advance. An appraisal should be presented—ideally, in person or at least via videoconference—and discussed, not handed off for signature.
2. Optional, but recommended: Ask the employee to complete and submit a self-evaluation prior to the appraisal meeting. This will allow your employee time to reflect and will give you a heads up on any significant differences in opinion.
3. Decide on the desired outcome and plan accordingly. Assuming you’ve been provided feedback on an ongoing basis, the substance of the meeting won’t be a surprise. Have the information or resources you need on hand or on call.
4. Develop your talking points.
 - Focus on the most significant success factors and, based on the data you’ve collected, identify specifics that warrant recognition as well as development opportunities.
 - Relate your findings to organizational or departmental goals.
 - Based on the above, identify next steps, including future SMART goals and associated action items. The objective is for the employee to come out of the meeting with a clear sense of where they stand, a renewed sense of purpose and a clear sense of direction.
5. Conduct the appraisal meeting
 - Provide your employee with a written copy of his or her appraisal. Discuss your observations and expectations. Invite comments. Keep feedback focused on performance, rather than the person and emphasize opportunities for improvement.
 - At a minimum, the meeting should include the employee’s acknowledgement of the appraisal. Ideally, the meeting will be a springboard to the next review or appraisal period.

Practice question

<https://assessments.lumenlearning.co...essments/18187>

1. Adams, Amy. "A First-Time Manager's Guide to Performance Reviews." The Muse. Accessed August 20, 2019. ←

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