

Documentation for appraisals – using an action plan

Instructions for completion of documentation

- Keep one copy for the practice employee record, and give one copy to the general practice nurse (GPN).
- Appraisal documentation should always be accompanied by a copy of the job description, as this is an ideal opportunity to review this at the same time.
- The appraisal documentation should include a date for informal and formal review (ie at 1 year).
- The appraisal documentation should be given to the GPN at least 1 week prior to the appraisal to allow adequate time for reflection and completion.
- It should be made clear that the SWOT analysis **MUST** be completed before the appraisal can take place.
- The action plan should be updated whenever there has been a change – either when a goal is achieved or modified or where a new need is identified. The original version should be retained for discussion at the next review.

The documentation for appraisals includes:

- SWOT analysis
- appraisal for GPNs
- performance review summary
- action plan.

SWOT analysis

Undertaking a SWOT analysis allows the individual to undertake a self-assessment of their performance in the practice. This will provide the appraiser with valuable insight as to how well the GPN thinks he/she is doing.

Instructions to GPN: The following SWOT analysis must be completed prior to your appraisal. This is a self-assessment for you to consider all your strengths and weaknesses in relation to your current role and to identify any barriers to your optimal performance.

STRENGTHS	WEAKNESSES
OPPORTUNITIES	THREATS

Appraisal for GPNs

Practice partnership:

Name:

Name of appraiser:

Date of appraisal:

Date of last appraisal:

Length of time in employment with the practice:

Title of post:

	Comments from appraiser	Comments from appraisee
<ul style="list-style-type: none">• What are the good things about your job?• What do you enjoy?		
<ul style="list-style-type: none">• In what areas do you think you are most skilled?• How can you maintain or improve those skills further?		
<ul style="list-style-type: none">• What are the things you enjoy least about your job?• What could help to improve this?		
<ul style="list-style-type: none">• In what areas do you think you lack skills?• How could you develop these skills for the future?		
<ul style="list-style-type: none">• What courses or training events have you attended over the past year?		
<ul style="list-style-type: none">• What courses or training events would you like to attend in the future?		

Performance review summary

GPN:

Appraiser:

Date:

Instructions to appraiser: To be completed by the appraiser during the appraisal. Attach copies of the current job specification and personal development plan.

	Short-term	Long-term
Personal objectives		
Practice objectives		

Signed: (appraisee)

Signed: (appraiser)

Action plan

What development needs are there? (Explain the need)	How will we meet them? (Explain how you will take action, and what resources you will need)	Date to achieve the development goal? (agreed date between appraisee and appraiser)	Outcome? (How will your work change as a result of the development activity?)	Completed (Agreement from your appraiser that the development need has been met)
1.				
2.				
3.				
4.				