

## Staff Performance Appraisal System

The system of appraising staff at Imperial College Union is designed to praise in a timely fashion, raise concerns as well as to monitor and support individuals against targets set and budgets allocated. We believe that as an organisation we work more effectively and efficiently and with a clearer unity of purpose if all staff get the opportunity to be appraised, and that ultimately this should be a mechanism to develop a better working environment for all employees of the Union. We should strive to develop a system that gets the best out of everyone, through recognition of achievements, addressing shortcomings and incorporates feedback from the line manager, all other members of staff and a self-assessment.

### Target setting

1. Yearly targets should be set for all staff at the beginning of the College financial year (August)
2. Targets should be developed using the Union's Strategic Plan as a guide, as well as the manifesto points and ideas of the new Sabbatical Officers; each target should be questioned as to where it fits into the Strategic Plan.
3. Each staff member should have their targets agreed with their line manager
  - a. The Operations Manager and Deputy Presidents shall have their targets agreed with the President
4. Targets can be qualitative and/or quantitative and may include personal as well as professional development
5. Where necessary, the staff training budget for each area can be earmarked for specific training to help meet targets

### Appraisal

1. Appraisals for all staff will happen three times each year (November, April and July). The July appraisal shall be the formal appraisal to cover the whole year's performance[, and on which any performance-related salary adjustment shall be based].
2. The aim of each appraisal is to review the targets set and overall performance and to modify the targets according to results. Methods of action are outlined below for exceeding or failing to meet targets.
3. The timeline and method for an appraisal shall be:
  - a. Each staff member shall submit a self-assessment on what they've achieved against their targets to their line manager two weeks before the date of the appraisal using Form 1
  - b. All staff members are invited to give evidence-based feedback about each other's performance to the line manager of the member of staff concerned. This should also be submitted to the line manager one week before the appraisal date. These comments will remain anonymous.
  - c. During the appraisal meeting, the line manager will appraise the staff member using personal knowledge, feedback from other staff and the self-assessment and check performance against that year's established targets.

- d. In cases where targets have not been met the line manager should take action as appropriate to make allowances for unknowns but also to use the warning system detailed in Appendix 1. In the event of persistent failure to meet targets this may lead to disciplinary action (as detailed in the College disciplinary policy which can be found at <http://www3.imperial.ac.uk/hr/procedures/a-z/disciplinary>).
  - e. In cases where targets have been met and/or exceeded the line manager may consider referring the member of staff to receive an increase in salary (performance related pay). This system is detailed in Appendix 2.
  - f. Targets may be reconfigured at each appraisal stage.
  - g. Should the staff member require it, the appraisal system should identify if further training is needed and, if so, finances for this should be sought from the training budget.
  - h. After the interview, notes should be written up and logged as a record of comments and reconfigured targets for the next appraisal. These shall remain confidential to the staff member and their line manager though individual projects and targets should be discussed with colleagues.
  - i. There should be a sign off officer for each appraisal who shall be a member of staff at the same level as the line manager of the member of staff being appraised. They should check that the notes and actions reflect a realistic view of performance. Issues regarding the fairness of the appraisal should be brought to the line manager of the staff member giving the appraisal.
4. The Deputy Presidents and President review their targets and projects weekly. They are required to submit a report to each monthly Council where they are questioned on this report.