

Proposed change to the appraisal form

Introduction

The Library has redeveloped the staff appraisal form to ensure it is as accessible as possible. The existing Microsoft Word form is not optimal for colleagues who require, for example, screen-reading software, or who have hand motor impairment. Facilitating appraisal via Microsoft Word is also challenging to manage as a collaborative document between an appraisee and an appraiser. Versioning is poor and documents can be misplaced by appraisees between appraisals.

There is no change to the appraisal process itself, which has been in place for several years and has the support of staff.

The Library has consulted the following appraisal stakeholders to ensure there are no concerns about the change to the form: HR, Organisational Development, and the MyHR team. All are content that the proposed changes are within the existing University policies and system parameters.

Revised form

The revised form has been developed as a template in OneNote. An access-controlled version can be made for each colleague.

Data protection

Only the appraisee and their appraiser will have access to the form. Once completed, the form can be saved as a PDF and added to the colleague's MyHR record. Both the original OneNote version of the appraisal form, and the PDF version within MyHR will be stored and accessed in compliance with GDPR, as is the case with the current form.

Advantages of Microsoft OneNote

Microsoft OneNote allows colleagues to complete the appraisal form by typing or dictating responses. It also facilitates the use of multimedia, including the use of audio or video for any staff wishing to use this. The OneNote version of the appraisal will be safely stored in the cloud, allowing appraisees and appraisers to access it on any device, secured behind their Microsoft 365 login.

Staff consultation

The form has been shared with a number of colleagues within the Customer Experience and Insight team. This follows initial consultation with members of the Library's Service Delivery and Improvement Team (SDIT). Feedback was positive about changing the format, and suggested a few minor changes which have subsequently been made to the form.

Next steps

SDIT is asked to formally approve the OneNote form, and to seek formal feedback from the Library's Trades Unions.