

Guidance for Managers: Using Appraisals Effectively During Organisational Change

During periods of change and uncertainty, such as organisational restructures, appraisals remain a vital tool to support individuals, ensure clarity, and enable future planning. While the landscape may be shifting, the Appraisal offers a structured opportunity to reflect, realign, and help individuals navigate the transition.

Purpose of the Appraisal

The Personal Appraisal and Development discussion is not just a formal process—it is a meaningful conversation designed to:

- Ensure a shared understanding of objectives
- Celebrate successes and achievements
- Identify and address any obstacles to achieving objectives
- Identify strengths and areas for development
- Enable open discussion of career aspirations

These aims remain relevant and valuable, even (or especially) in times of change.

Timing and Flexibility

The appraisal window runs from **May through to the end of November**, allowing significant flexibility in when to hold these conversations. Managers are encouraged to choose a time that is **most useful for the individual** and for the team, based on workload, and role clarity.

Appraisals **do not need to be a single meeting**. For example, you might focus initially on celebrating successes and addressing current priorities, discussing support the team member may need including development and return to future objectives or development planning once more is known. It should be noted that objectives are always open to change.

Using the Appraisal During Change

When roles may be evolving or uncertain, consider using the appraisal conversation to:

- Reflect on **what has gone well** in the current role—what can be carried forward into future roles.
- Discuss how the individual is **experiencing the change**—what support or clarity they need. You may find the [wellbeing pages](#) useful.
- Explore **skills and strengths** that could be transferable to emerging roles or responsibilities. Our values in action and leading together in [Flourishing at Queen Mary](#) toolkit may help.
- Consider **short-term objectives** and areas for growth that are relevant now, even if longer-term planning is less certain.
- Begin or continue conversations about **career direction**, readiness for change, or interest in potential future opportunities. There are [guides and tools for PS, technical and operational staff](#), the [academic careers framework](#) and information on different [development providers](#) and [CPD training](#)

Practical Tips for Managers

- **Communicate early:** Let your team members know how and when you plan to hold their appraisal conversation and what they may want to prepare for it e.g. looking at shorter term objectives of development needs.
- **Tailor the conversation:** Use the flexibility of the format to focus on what's most helpful to the individual at that time.
- **Acknowledge uncertainty:** It's okay not to have all the answers—transparency and empathy build trust.
- **Follow up:** Use notes from the appraisal to guide future 1:1s or adapt plans as the situation develops.