



## EVIDENCE SEARCH RESULTS

|                                     |   |
|-------------------------------------|---|
| <b>Question/subject of request:</b> | Looking for evidence as to the efficacy of appraisal in colleague outcomes, focussed on performance, development and role satisfaction.<br>Looking at whether there are exemplar organisations that have managed to get appraisals working to a high standard with measurable benefits and outcomes. OR organisations that have taken an evidence based route to removing the appraisal requirements. |
| <b>Date requested:</b>              | 15/07/2024  |
| <b>Date completed:</b>              | 24/09/2024  |
| <b>Compiled by:</b>                 | Veronica Price  |

### CITING THIS SEARCH

If you reference this search in any paper, publication or presentation, please let us know.

The citation format is:

- Price, V., (2024). *What evidence is available on the efficacy of appraisal in colleague outcomes, focused on performance, development and role satisfaction?* Taunton, UK: Somerset Foundation Trust Knowledge and Library Services.

### CONTACT DETAILS

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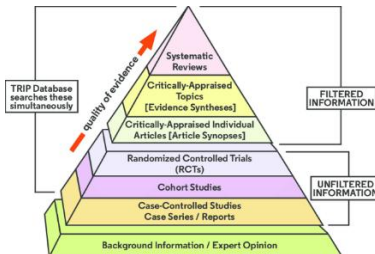


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The results are presented according to the hierarchy of evidence which is used to rank the relative strength of results obtained from scientific research.

The design of the study and the endpoints measured affect the strength of the evidence.

Evidence hierarchies are often applied in evidence-based practices and are integral to evidence-based medicine.

**Contents** (click to jump to each section):

- [INFORMATION FROM OTHER NHS ORGANISATIONS](#)
- [JOURNAL ARTICLES](#)
- [ONLINE RESOURCES](#)

### **Summary of search results:**

I have searched in the healthcare databases and in the grey literature (including investigating employers outside the healthcare industry) to find evidence of the efficacy of the appraisal process in terms of colleague performance, job satisfaction and development and strategies which have been implemented to improve or replace the traditional annual appraisal.

I have organised this summary into the following categories:

- General overview of appraisal efficacy
- Case studies, initiatives and good practice from other healthcare organisations
- Case studies, initiatives and good practice from outside healthcare
- Examples of the removal of appraisal

### **General overview of appraisal efficacy**

A comprehensive and widely cited meta-analysis review article by [Cawley et al. \(1998\)](#), looked at the overall relationship between appraisal participation and employee reactions. They point out that performance appraisals have been widely studied in terms of their effectiveness as a tool for the assessment of work performance, but it is difficult to measure a direct relationship. Therefore, in the research that was included in this review, assessment of appraisal efficacy was generally through the measurement of other criteria. It was suggested by a number of research groups that employee reactions to the appraisal process are usually better indicators of the overall viability of an appraisal system than technical considerations would be, highlighting that even the most technically sophisticated and accurate appraisal system would not be effective if it was not accepted and supported by employees.

Another interesting finding reported in this analysis is that the opportunity for staff to voice their opinions regarding a decision increases the perceived fairness of the process even if it does not influence the decision, they state that this finding is in alignment with literature concerning justice and fairness.

The overall conclusions derived in this review were that increasing employee participation in the appraisal process was positively related to:

- employee satisfaction with the appraisal session
- employee satisfaction with the appraisal system
- perceived utility of the appraisal
- motivation of employees to improve performance





- perceived fairness of the system.

In the context of the healthcare environment [Stonehouse \(2013\)](#) examines the importance of appraisals as a tool for managers to develop and support their staff to deliver quality care. In this paper the negativity which is sometimes felt towards appraisal is recognised, potential difficulties in the process are examined, and the article concludes with advice to increase the training of both managers and their staff to improve the outcome of performance appraisals.

More recently, an article by [Adler et al. \(2016\)](#), recaps the debate which investigated the pros and cons of retaining performance ratings during the 2015 Society for Industrial and Organizational Psychology Conference in Philadelphia. They state the need for a fundamental approach to performance management and mention that Eli Lilly, Adobe and Gap Inc have eliminated annual performance ratings.

A 2023 blogpost on the McKinsey & Co website, [How to get the most from end-of-year reviews](#), provides useful insights and improvement suggestions for three key areas that can contribute to a successful employee appraisal:

- Growth
- Purpose
- Connection

Within this blog post, there is a link out to [the OILS framework](#) that McKinsey & Co use to structure manager feedback to their employees – Observation, Impact, Listen, Solution and Strategy – which may be helpful within the context of appraisal format..

### **Case studies, initiatives and good practice from other healthcare organisations**

Hertfordshire Partnership University NHS Foundation Trust have been shortlisted for the HSJ awards 2024 in the workforce initiative of the year category for their [development of an appraisal app](#). This has been designed for staff and managers to guide and record appraisal conversations digitally and in real time apparently among the elements built into the app all the opportunity to include well-being conversations in the appraisal discussion. It is claimed that the app improves productivity and the trust hope it will help to improve workforce development and retention. The following [appraisal conversation template](#) is openly available on the HPFT website.

A 2018 case study from the Midwifery team at Sheffield Teaching Hospital NHS Foundation Trust, [A bespoke training package for midwives at Sheffield Teaching Hospital](#) presents a [Listening into Action](#) approach to practice change to enable the improvement in mandatory training and appraisal rates amongst midwifery staff from 70% to 90%. Recognising that the appraisal process needed to be standardised and improved, they developed regular appraisal and structured reflection processes which now include:

- Protected time for appraisal;
- Support with revalidation;
- A chance to progress and develop;
- Access to external courses;
- Post appraisal follow-up.

Furthermore, mandatory training and appraisal processes have been aligned to enable their simultaneous delivery.

In an academic paper from [2016, Wiskin et al](#) report on a case study from **Salford Royal Foundation Trust** after the organisation replaced their staff performance appraisal system with a new 'Contribution Framework' (CF). This change was based on the results of their 2013 annual staff survey which found that only 51% of colleagues felt they had a well-structured appraisal. The article describes the improvements which were incorporated into the new CF performance review:

- Conversation based
- Designed to motivate
- Designed to engender pride in delivery of high standard, safe, clean, and personal, care





- Designed to address deficits in professionalism and communication
- Performance review criteria aligned to trust values
- A resetting of mindset across the trust
- The inclusion of three annual conversations, objective setting, mid-year review, and end rating all contributing to an ongoing dialogue

Pre and post course attitudes towards CF training were analysed. Findings were positive overall, demonstrating a significant change in the attitude of participants towards the new appraisal process.

The abstract of an article by [Norman, Pearson and Knight \(2022\)](#) appears to offer practical advice for nurse managers in how to complement staff appraisal with ongoing performance reviews “which support nurse managers and staff to identify and address issues in a timely manner”. We do not have full text access to this journal and would have to request it for you, if you wish to read the article.

### **Case studies, initiatives and good practice from outside healthcare**

A report on the McKinsey & Co. website, posted May 2024, [In the spotlight: Performance management that puts people first](#), is based on their own research across a number of global companies. The report is fully accessible and downloadable, containing some excellent graphics about designing performance management systems and the disconnect between managers and employees around why employees leave an organisation. There is clear analysis of the four reward categories which are important to employees, compensation, career progression, development opportunities and recognition – which should be incorporated into any performance management format.

From the abstract, it looks as if the study by [Rubin and Edwards \(2020\)](#) would be of interest in answering your question. They conducted an empirical analysis using information on appraisal systems and discrimination complaints from the US federal government and conclude that for managers struggling with performance management it may be better to spend time on improving performance focused interpersonal communication rather than redesigning appraisal systems. We do not have full text access to this article could request it for you if you would like to read the article in full.

Similarly, because these articles come from HR Journals rather than healthcare journals, we do not have full text access to studies by: [Liao et al. \(2024\)](#), [Murphy \(2020\)](#), [Cappelli and Conyon \(2017\)](#) or [Kuvaas \(2006\)](#).

### **Examples of the removal of appraisal**

This article, [The Performance Management Revolution](#), published in the Harvard Business Review by Cappelli and Tavis (2016) provides analysis and a timeline of developments in performance management, outlining the decisions taken by Silicon Valley employers and several management consultancy firms to abandon the traditional performance appraisal in exchange for more agile feedback mechanisms. Employers cited as having replaced annual reviews with frequent, informal check-ins between managers and employees are:

Adobe  
Juniper Systems  
Dell  
Microsoft  
IBM  
Deloitte  
Accenture  
PwC  
Gap  
Lear  
Oppenheimer Funds  
General Electric

The main argument for the change is to stop “holding staff accountable for past behaviour at the expense of improving current performance and grooming talent for the future”





I will just focus on Adobe as a case study for replacing traditional performance appraisal with a system of check-ins, because as one of the first corporations to make this switch, their case has been well documented.

From the [Adobe website](#) there is a clear comparison table of performance management under the traditional system pre-2012 and the Check-in system which replaced it. Donna Morris, the Executive Vice President of Customer & Employee Experience who initiated the change was named a [Fellow by the National Academy of Human Resources \(NAHR\)](#), a designation that is considered among the most prestigious honours in the human resources field, in part for her innovation which led to a more agile and engaged workforce. This article, [How Adobe Scrapped Its Performance Review System And Why It Worked](#), published in Forbes (2016) outlines the process of employee consultation and feedback that Donna Morris undertook during the transformation from traditional appraisal to the Check-In model. At the time of publication, it was reported that Adobe saw a 30% decrease in the number of employee resignations and a 50% increase in involuntary departures following the change.

This report, [HR Lessons from the Adobe Performance Management Overhaul](#), is published on the website of PerformYard, the company that supplies the new check-in software, but it seems to give a factual outline of the reasons and outcomes of the switch. For example in 2012, it was calculated that 80,000 working hours were taken up by the review cycle annually. Clearly employee and manager training in the new system has had to be implemented, along with an IT system being implemented, however a 2016 estimate showed that the company was saving more than 100,000 manager hours each year under the new structure.

I hope this is helpful. Please do let us know if you need any further information.

The library keeps a repository of evidence searches on the inSPIRE institutional repository. These results will only be shared in the repository if you have given your permission to do so.

Thank you.

## Other NHS organisations

**Hertfordshire Partnership University NHS Foundation Trust, 2024**

[HPFT shortlisted for HSJ Awards 2024 - Appraisal app](#)

LinkedIn post from Nicola King Assoc. CIPD:

[https://www.linkedin.com/posts/nicolaking10\\_hsjawards-activity-7230154407252824065-vu4L?utm\\_source=share&utm\\_medium=member\\_desktop](https://www.linkedin.com/posts/nicolaking10_hsjawards-activity-7230154407252824065-vu4L?utm_source=share&utm_medium=member_desktop)

**Sheffield Teaching Hospital NHS Foundation Trust, December 2018**

Case Study: [A bespoke training package for midwives at Sheffield Teaching Hospital](#)

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## Journal Articles

**The utility of performance review systems: A total quality management perspective**

[Full text access will need to be requested]

DOI: <https://libkey.io/10.1002/jsc.2580>



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**Authors:** Liao, Ying Ying;Soltani, Ebrahim;Iqbal, Abdullah and van der Meer, Robert

**Publication Date:** 2024

**Journal:** Strategic Change 33(4), pp. 287–310

**Abstract:** Abstract Scholars and practitioners alike have argued that performance review is prone to destructive effects and negative outcomes in progressive work organizations with a total quality management (TQM) orientation. Despite its pervasive use and significant consequences at individual, team, and organizational levels across contemporary workplaces, it has remained inadequately explored for its current operational systems and their role in helping employees achieve job mastery and enabling organizations to attain desired quality outcomes. To address this lacuna, this study aims to explore how performance review systems can align with continuous quality improvement in contemporary workplaces that espouse a culture of continuous learning and quality improvement. Given the exploratory and broad scope of the research, it adopts a multiple case study design which offers benefits both in terms of process and outcomes. The findings are indicative of two different performance review systems with very different implications for managing employees and achieving quality outcomes in line with TQM: tactical system with a focus on employee obedience to rigid top-down control system for achieving conformance quality measures, and a dynamic system with a focus on employee ownership of the quality process for achieving desired quality.

**How to undertake annual appraisals and ongoing performance reviews.**

[Full text access will need to be requested]

**DOI:** [10.7748/nm.2022.e2065](https://doi.org/10.7748/nm.2022.e2065)

**Authors:** Norman K, Pearson L, Knight K

**Publication Date:** 2022

**Journal:** Nursing Management.

Annual appraisals, which are mandatory in most healthcare organisations, are crucial for enhancing staff performance and embedding a culture of continuous improvement within teams. Appraisals can be usefully complemented by ongoing performance reviews, which support nurse managers and staff to identify and address issues in a timely manner. The term ‘performance management’ often has negative connotations, but it can be a powerful tool for staff development and positive learning experiences. This article supports nurse managers to understand how to adequately prepare for and conduct appraisals and performance reviews.

**Performance evaluation will not die, but it should**

[Full text access will need to be requested]

**DOI:** <https://libkey.io/10.1111/1748-8583.12259>

**Authors:** Murphy, Kevin R.

**Publication Date:** 2020



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**Journal:** Human Resource Management Journal 30(1), pp. 13–31

**Abstract:** Abstract A wide range of systems for evaluating performance have been used in organisations, ranging from traditional annual performance appraisals to performance management systems built around informal, real-time evaluations, and these systems almost always fail. Rather than continuing to make cosmetic adjustments to this system, organisations should consider dropping the practice of regularly evaluating the performance of each of their employees, focusing rather on the small subset of situations in which evaluations of performance and performance feedback are actually useful. Four barriers to successful performance evaluation are reviewed: (a) the distribution of performance, (b) the continuing failure to devise reliable and valid methods for obtaining judgments about performance, (c) the limited utility of performance feedback to employees, and (d) the limited utility of performance evaluations to organisations. In this paper, I propose ways of managing performance without relying on regular performance evaluation, refocusing managers' activities from performance management to performance leadership.

**The performance of performance appraisal systems: understanding the linkage between appraisal structure and appraisal discrimination complaints**

[Full text access will need to be requested]

**DOI:** <https://libkey.io/10.1080/09585192.2018.1424015>

**Authors:** Rubin, Ellen V. and Edwards, Amani

**Publication Date:** 2020

**Journal:** The International Journal of Human Resource Management 31(15), pp. 1938–1957

**Abstract:** Employee perceptions of the fairness of performance evaluations are critical to the success of any appraisal system. Research on performance management includes extensive studies on how bias emerges in the appraisal process. Despite this, there is no empirical evidence linking formal discrimination complaint filings ? a key measure of bias - and performance appraisals. To close this gap, we conduct an empirical analysis using information on appraisal systems and discrimination complaints from the US federal government. Our findings suggest that agencies with better-designed appraisal systems will experience higher appraisal-related discrimination complaints, contrary to expectations. In particular, an expansion of training and voice opportunities are associated with an increase in appraisal discrimination complaints, while increased differentiation between performers is not consistently associated with complaints. For managers struggling with performance management, it may be better to spend time on improving performance-focused interpersonal communication rather than redesigning appraisal systems.

**What Do Performance Appraisals Do?**

[Full text access will need to be requested]

**DOI:** <https://libkey.io/10.1177/0019793917698649>

**Authors:** Cappelli, Peter and Conyon, Martin J.

**Publication Date:** 2018

**Journal:** ILR Review 71(1), pp. 88–116



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**Abstract:** Performance appraisals, the evaluation of an employee's job performance over the previous period by one's supervisor, are a standard practice in virtually every organization. They are one of the most important, time-consuming, and unpopular tasks in management. Despite this, remarkably little is known about how performance appraisals operate, especially their consequences. Indeed, much of what is written from a practitioner perspective typically suggests that they do little. By contrast, we document empirical evidence of the importance of performance appraisals using data from a large US corporation. The results in this case show that appraisals are informative and directly influence many dimensions of employee outcomes, including employee bonuses, merit pay, employee promotions, and decisions to exit the firm. The evidence shows that the appraisal process here is consistent with a relational, open-ended view of employment. It is not consistent with the common economic view that performance appraisals simply settle-up contractually based employment relationships.;

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**[Getting Rid of Performance Ratings: Genius or Folly? A Debate](#)**

**Authors:** Adler, Seymour;Campion, Michael;Colquitt, Alan;Grubb, Amy;Murphy, Kevin, et al

**Publication Date:** 2016

**Journal:** Industrial and Organizational Psychology 9(2), pp. 219–252

**Abstract:** Despite years of research and practice, dissatisfaction with performance appraisal is at an all-time high. Organizations are contemplating changes to their performance management systems, the most controversial of which is whether to eliminate performance ratings. The pros and cons of retaining performance ratings were the subject of a lively, standing-room-only debate at the 2015 Society for Industrial and Organizational Psychology conference in Philadelphia (Adler, ). Given the high interest in this topic, this article recaps the points made by the panelists who participated in the debate. The arguments for eliminating ratings include these: (a) the disappointing interventions, (b) the disagreement when multiple raters evaluate the same performance, (c) the failure to develop adequate criteria for evaluating ratings, (d) the weak relationship between the performance of ratees and the ratings they receive, (e) the conflicting purposes of performance ratings in organizations, (f) the inconsistent effects of performance feedback on subsequent performance, and (g) the weak relationship between performance rating research and practice in organizations. The arguments for retaining ratings include (a) the recognition that changing the rating process is likely to have minimal effect on the performance management process as a whole, (b) performance is always evaluated in some manner, (c) "too hard" is no excuse for industrial–organizational (I-O) psychology, (d) ratings and differentiated





evaluations have many merits for improving organizations, (e) artificial tradeoffs are driving organizations to inappropriately abandon ratings, (f) the alternatives to ratings may be worse, and (g) the better questions are these: How could performance ratings be improved, and are we conducting the entire performance management process properly? The article closes with questions organizational members have found useful for driving effective performance management reform.

**Mindset, confidence and skill: The impact of a development intervention**

**Authors:** Wiskin, Connie;Duffy, John;Weetman, Katharine;Skelton, John and Swindells, Carole

**Publication Date:** 2016

**Journal:** British Journal of Healthcare Management 22(6), pp. 315–324

**Abstract:** This article reports changes in mindset and attitudes of a cohort of 798 NHS managers in relation to the implementation of a new NHS trust-wide performance appraisal system. This was measured through two methods: the statistical analysis of data collected before and after an intensive training/orientation intervention by means of 22 tests; and a corpus linguistic analysis of word associations and text comments that is novel to the literature.

**Appraisal: a key tool to delivering quality care**

**Authors:** Stonehouse, David

**Publication Date:** 2013

**Journal:** British Journal of Healthcare Management 19(7), pp. 338–341

**Abstract:** In this article the author will examine the important role that the appraisal system, or performance review, plays in ensuring and improving quality care. As a manager it is your responsibility to support and develop your staff. Through appraisal you can identify good practice and support the achievement of organisational goals. It is also your opportunity to sit down with your staff on a one to one and discuss short falls and problems in performance. This article will start by highlighting the benefits and importance of appraisals, before examining why they have also generated such bad press in the past with both managers and staff? It will then identify the role and purpose that appraisal brings when performed correctly. Why difficulties may arise in performing appraisals will be highlighted. The importance of training for both managers and staff, in the appraisal process will be discussed as a key element to success.; In this article the author will examine the important role that the appraisal system, or performance review, plays in ensuring and improving quality care. As a manager it is your responsibility to support and develop your staff. Through appraisal you can identify good practice and support the achievement of organisational goals. It is also your opportunity to sit down with your staff on a one to one and discuss short falls and problems in performance. This article will start by highlighting the benefits and importance of appraisals, before examining why they have also generated such bad press in the past with both managers and staff? It will then identify the role and purpose that appraisal brings when performed correctly. Why difficulties may arise in performing appraisals will be highlighted. The importance of training for both managers and staff, in the appraisal process will be discussed as a key element to success.





## Performance appraisal satisfaction and employee outcomes: mediating and moderating roles of work motivation

[Full text access will need to be requested]

DOI: <https://libkey.io/10.1080/09585190500521581>

**Authors:** Kuvaas, Bård

**Publication Date:** 2006

**Journal:** The International Journal of Human Resource Management 17(3), pp. 504–522

**Abstract:** The purpose of this study was to explore alternative relationships between performance appraisal satisfaction and employee outcomes in the form of self-reported work performance, affective organizational commitment and turnover intention. A cross-sectional survey of 593 employees from 64 Norwegian savings banks showed that performance appraisal satisfaction was directly related to affective commitment and turnover intention. The relationship between performance appraisal satisfaction and work performance, however, was both mediated and moderated by employees' intrinsic work motivation. The form of the moderation revealed a negative relationship for employees with low intrinsic motivation and a positive relationship for those with high intrinsic motivation. Implications for practice and directions for future research are discussed.

## [Participation in the performance appraisal process and employee reactions: A meta-analytic review of field investigations](#)

**Authors:** Cawley, Brian D.; Keeping, Lisa M. and Levy, Paul E.

**Publication Date:** 1998

**Journal:** Journal of Applied Psychology 83(4)

**Abstract:** The relationship between participation in the performance appraisal process and various employee reactions was explored through the meta-analysis of 27 studies containing 32 individual samples. The overall relationship ( $\rho$ ) between participation and employee reactions, corrected for unreliability, was .61. Various conceptualizations and operationalizations of participation and employee reactions also were discussed and analyzed. Overall, appraisal participation was most strongly related to satisfaction, and value-expressive participation (i.e., participation for the sake of having one's "voice" heard) had a stronger relationship with most of the reaction criteria than did instrumental participation (i.e., participation for the purpose of influencing the end result). The results are discussed within the framework of organizational justice. (PsycINFO Database Record (c) 2016 APA, all rights reserved) (Source: journal abstract)

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## Online Information from Grey Literature Sources

McKinsey & Company, People & Organization Blog



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[In the spotlight: Performance management that puts people first](#), report May 2024

[How to get the most from end-of-year reviews \(mckinsey.com\)](#) blogpost November 2023

**Harvard Business Review**

[The Performance Management Revolution](#)

Cappelli and Tavis, 2016

**Adobe**

[How Adobe continues to inspire great performance and support career growth](#)

**Forbes Magazine**

[How Adobe Scrapped Its Performance Review System And Why It Worked, 2016](#)

David Burkus, 2016

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|--|---------|---|----------------------------|--|
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|  | Medline |   | Social Policy and Practice | Cochrane Library   |
|  | Emcare  |   | CINAHL                     | ✓ TRIP   |
|  | Embase  |   | PsycINFO                   | ✓ Grey Literature – Google Advanced Search, The King’s Fund, Future NHS, NHS England |
|  | AMED    |   | UpToDate                   | ✓ Other – Co-pilot, SciSpace, LitMaps  |

**PURPOSE OF SEARCH**



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|   |                                  |  |   |
|---|----------------------------------|--|---|
|   | Patient info/health & well being |  | Clinical decision making (inc. patient care)      |
|   | Executive Team support           |  | Research/Education/Professional development       |
|   | Quality Improvement              |  | Primary Care & Neighbourhoods Directorate support |
| ✓ | KM/Management decision making    |  | Other   |

| USER CATEGORY OF REQUESTOR |                             |   |                             |
|----------------------------|-----------------------------|---|-----------------------------|
|                            | Medical students            |   | Patients/public             |
|                            | Nursing/midwifery students  |   | Physician Associates        |
|                            | Junior doctors              |   | Public Health (Somerset CC) |
|                            | Nurses/Midwives             | ✓ | Other - People Services     |
|                            | Allied Health professionals |   |                             |

| HAS PERMISSION TO SHARE THE RESULTS BEEN OBTAINED FROM THE REQUESTOR? |             |  |                   |
|---|-------------|--|-------------------|
| ✓   | YES - share |  | NO – do not share |

| KEY WORDS/SEARCH STRATEGY INCLUDING MESH HEADINGS   | LIMITS USED      |
|---|------------------|
| Appraisal OR “performance review*” OR “personal development”<br>Barrier* OR problem* OR improv* OR strateg* | English language |





| METADATA (TAGS) |  |  |  |
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