NESC Matching Process

1. Ensure that the list of appraisers is up to date and includes all newly trained appraisers, and excludes any appraisers who have retired.

2. Ensure that the list of appraisees is up to date and includes all newly trained doctors who are having their first NHS appraisal after completion of training, and excludes all doctors removed from the performer’s list because they have retired or for any other reason.

3. Check whether there are any other appraisees who are known NOT to need an appraisal during the year due to maternity, illness, sabbatical etc. and make a note on their record. This information may not always be available.

4. Once the lists are complete, contact all appraisers and ask
   - if there is anyone they cannot appraise (partners in practice or life, own GP, own patient, etc. – there must not be a formal relationship that could appear to interfere with the ability to conduct a non biased appraisal, or alter the balance of power in the appraisal) This information should be held year on year and added to the notes for each appraiser but it should still be double checked annually as it may be subject to change.
   - how many appraisals they would like to and have capacity to do in the year (minimum 5, maximum to be balanced out with the other appraisers in the area to be fair)
   - who they have already appraised 3 times, and cannot therefore do again within the next 10 years.
   As NESC gets organisational memory this will automatically be collected on the database but it is not currently available for all PCTs.

5. Incorporate responses into the notes for each appraiser on the table.

6. Ensure that the vetos historically recorded by each appraisee are noted on file so that the same appraiser cannot be allocated in error. In particular, note the appraisees who have said on their feedback form that they do NOT want the same appraiser.

7. Reallocate the appraisees that have not had the appraiser three times yet to the same appraiser.

8. Proceed to active matching, using the following criteria
   - Appraiser has not vetoed appraisee
   - Appraisee has not vetoed appraiser
   - Local knowledge suggests this is a suitable match in terms of geography etc
   - Ensure vulnerable appraisees (where known to NESC) have experienced appraisers
   - Ensure new appraisers have a range of experienced appraisees
   - Appraisers have the number of appraisals requested above the minimum of 5
   - Appraisers have equal numbers of appraisals, except where they have specifically requested less than the norm (but still need to do 5 or above)
   - There is a spread throughout the year in terms of appraisal due dates

9. Advise appraisers of the appraisees they have been allocated for a further check that they are all acceptable to the appraiser.

10. Once appraisers have confirmed that the allocations are appropriate for them, advise appraisees of their allocated appraiser for the year and ask them to confirm that they are also happy with the allocation.
CONGRATULATIONS – the matching process is now complete for the year!

EXCEPTIONS TO THE ABOVE
For the appraisal leads, there is a potential difficulty with being appraised by appraisers where there is a performance review responsibility, so NESC will arrange cross border appraisals in these cases.

Normally in view of geography:
Dorset Local Lead to be appraised by Bournemouth and Poole appraiser
Bournemouth and Poole Local Lead to be appraised by Dorset appraiser
Portsmouth City Local Lead to be appraised by a south Hampshire appraiser
North Hampshire Local Lead to be appraised by a Hampshire appraiser outside their area
South West Hampshire Local Lead to be appraised by a Hampshire appraiser outside their area
South East Hampshire Local Lead to be appraised by a Hampshire appraiser outside their area
(or other appropriate match based on geography)

NESC Appraisal and Revalidation Lead to be appraised outside NESC

The Taskforce Lead can be appraised within NESC as this role has little / no line management responsibility for individual appraisers, but appearances of collusion must be avoided. (allocate to someone with whom there is little / no relationship in any sphere)

Other cross border appraisals can be organised within NESC at the request of the Local Lead who may know of individual circumstances that make this appropriate