

PERFORMANCE REVIEW - USER GUIDE

The performance appraisal document combines Objectives, Competencies, Personal Development and Career aspirations.

Prior to the review, please ensure you prepare sufficiently.

LOOKING BACK – HOW HAVE I DONE?

Objectives:

- At the review you will discuss and record current performance against objectives with your line manager.
- Ratings must be awarded based on the guidelines provided.
- If an individual's objective or job has changed during the year, a score should be awarded to reflect the performance up to the point of the change. The revised objective/s should be documented for the remainder of the year within the review document using realistic targets.

Competencies:

There are 4 Core Competencies which apply to all employees – How we communicate, Customer services, Team Work and Partnership, and Continuous Improvement and a fifth Competency – Leadership that applies to Supervisors/ Team Leaders/Specialists and Managers.

- Each Competency has 3 levels. All staff will be expected to display our Core Competencies, if you are a Supervisor/Team Leader/Specialist you'll be expected to display this level including the core competencies, and finally as a manager you'll be expected to display all 3 levels of competence.
- At the review discuss and record current performance against competencies with your line manager using the Competency Framework as a tool for discussion on expected levels of behaviour, it is not a definitive checklist.

Ratings:

- Scoring guidelines are attached for both Objectives and Competencies.
- Scores should be awarded based on demonstrated evidence and examples of what you have done and achieved.
- Each Objective and Competency is scored by selecting one of the 4 categories. The 'Scoring Criteria' is attached.
- Every endeavour should be made to agree the ratings between the line manager and the individual, if this is not possible it should be documented on the form.

Personal Development Looking Back:

Opportunity to record what training/development has taken place in the last 12 months and how it has been used in your job.

Reviewee / Line Manager Comments:

General comments about the last 12 months and /or career aspirations (if any)

LOOKING FORWARD – WHAT AM I GOING TO DO IN THE NEXT 12 MONTHS?

Objectives:

All staff will have up to 5 main objectives; Objectives must be SMART and directly linked to the Service/Corporate objectives.

- Agreed actions must be SMART (Specific, Measurable, Agreed, Realistic, Time bound). Include KPIs (Key Performance Indicators), milestones, timescales etc

Learning & Development:

Any learning and development needed to achieve the objective/competencies should also be discussed.

OBJECTIVE RATING GUIDELINES

EXCEEDED EXPECTATIONS (4):

- Delivered ahead of the expected timescale set for achieving the objective
- Exceeded the requirements of the objective to produce a more positive outcome than expected
- Produced excellent results against the objective with little or no supervision
- Demonstrated the ability to take on board additional responsibilities
- Demonstrated a 'can do' attitude towards the objective, inspiring and encouraging others

MET EXPECTATIONS (3):

- Achieved / delivered against the objective on time
- Performed a full and satisfactory result against the defined objective
- Required a normal/expected level of supervision when working towards the objective
- Could be relied upon to achieve the result
- Did absolutely all that was reasonably expected in relation to the objective, but something happened outside of the person's control to prevent the objective being met

PARTLY MET EXPECTATIONS (2):

- Achieved some of the defined objective, but not all
- Required more supervision/development/support than expected against the defined objective
- Quality of work produced did not fully meet expectations, and/or several amendments were required

DID NOT MEET EXPECTATIONS (1):

- Required constant supervision
- Continually missed the agreed milestones/deadlines against the set objective
- Repeatedly made mistakes or produced inaccurate work

COMPETENCY RATING GUIDELINES

EXCEEDING EXPECTATIONS (4):

- Evidence of working consistently at an exceptional standard.
- Demonstrates competency outside their normal sphere of influence i.e. across the wider council/cross organisational
- Demonstrates competency at next level, e.g. Supervisor/Team Leader/Manager (depending on current level).
- Evidence of delivering outside/above the parameters required within their job role

MEETING EXPECTATIONS (3):

- Evidence of working consistently at a very good standard.
- Demonstrates the expected competency for the level of the job
- For those new to the role, this means performing according to the reasonable expectations for someone with that level of knowledge/experience.

IMPROVEMENT NEEDED (2):

- Some ongoing support is needed in order to demonstrate competency at the expected level.
- This could also be a 'blip' in the performance of a usual good performer.
- Objective linked to this improvement should be established.

UNACCEPTABLE (1):

- Does not display the expected competency level required for the job.
- Improvement plan or capability procedure is required.

The competency ratings measure an individual's behaviour. This rating is measured taking into account what people actually do, thus ensuring 'competence' is clearly demonstrated by actions not perception.

A score of 3 ("Meeting Expectations") is awarded when an individual is demonstrating the level of competence expected for their job.

It is important to note that a score of 4 ("Exceeding Expectations") should only be awarded when an individual has consistently demonstrated behaviour above the requirements of their normal job as reflected in the ratings above.