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| **Appraisal and Development Review** |
| **Manager/Team Leader (B)** |

**DATA LABEL: OFFICAL -Sensitive**



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| **Employee:** |  |
| **Line Manager:** |  |
| **Date:** |  |

**⮹ Review Process**

The review process is designed to ensure that managers/team leaders are achieving agreed objectives, targets and outcomes and are developing the necessary knowledge, capabilities, leadership and management skills.

The process has three parts:

Managers/Team Leaders should complete the process with their line manager using the documentation provided in accordance with the accompanying guidance notes.

**⮹ Work Review**

**Work Plan Actions (Current Review Period)**

This section should be completed based on the mainwork plan actions assigned in the current review period and should summarise progress against targets and achievements to date.

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| **Main Actions** | **Progress made against targets and comments/issues arising** | **Review Notes/Comments** |
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**Work Plan Actions (Next Review Period)**

This section should be completed based on objectives, actions and targets planned for the coming review period as discussed and confirmed with the line manager.

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| **Main Actions** | **Target Outcomes** | **Timeline** |
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**Key Objectives and Results**

Key objectives and result areas describe the essential leadership and management performance outcomes required - what you need to do consistently well to perform effectively. Along with core competencies and behaviours, they bring together both aspects of your job – what is expected of you and how you are expected to do it. Both parts are important and effective performance means doing each part equally well. In

Discussion should focus on the overall impact and performance of the postholder across these areas in addition to the achievement of specific workplan outcomes.

| Key Objectives and Results | Brief comments on related actions/outcomes | Comments and actions agreed |
| --- | --- | --- |
| Managing Performance  Are key targets and outcomes being achieved and is performance being managed effectively? | | |
| * Achievement of targets and outcomes in accordance with council values and expected behaviours. |  |  |
| * Regular review of employee performance with appropriate feedback, and a drive for continuous improvement. |  |  |
| * Monitoring and review of customer service, performance measures and indicators. |  |  |

| Key Objectives and Results | Brief comments on related actions/outcomes | Comments and actions agreed |
| --- | --- | --- |
| Developing Team Capacity  What is being done to improve and develop team and individual capability and capacity? | | |
| * Reviewing and monitoring employee performance related to service outcomes and standards. |  |  |
| * Planned approach to employee development and succession planning. |  |  |
| * Improving the abilities of team members through effective task sharing, delegation and team working. |  |  |
| * Enabling teams and individuals to deal effectively with change and to take responsibility for operational problem solving and continuous improvement. |  |  |

| Key Objectives and Results | Brief comments on related actions/outcomes | Comments and actions agreed |
| --- | --- | --- |
| Cost Monitoring  Are cost targets being met and effectively monitored? | | |
| * Achievement of cost targets as a core management responsibility. |  |  |
| * Ensuring that everyone understands their accountability for meeting cost targets. |  |  |

| Key Objectives and Results | Brief comments on related actions/outcomes | Comments and actions agreed |
| --- | --- | --- |
| Working Together  What outcomes are being achieved through effective team and collaborative working? | | |
| * Working with internal and external partners and the benefits for customer service and performance/effectiveness. |  |  |
| * Encouraging collaborative working to foster team and cross service co-operation. |  |  |

| Key Objectives and Results | Brief comments on related actions/outcomes | Comments and actions agreed |
| --- | --- | --- |
| Emergency and Business Continuity Planning  Are teams and individuals fully aware of the service contingency provisions in place as part of the council’s emergency and business continuity plan? | | |
| * Team emergency contingency plans align with overall service and council contingency plan. |  |  |
| * Contingency plans regularly rehearsed and effectively communicated to team members. |  |  |

**⮹ Leadership Evaluation Framework**

Each of the following six competencies describes a number of behaviours and outcomes relating to your management and leadership role:

The competency evaluation framework below sets this out in greater detail and you are required to provide practical examples as evidence of how you have been able to demonstrate these behaviours in your day to day management role.

You should concentrate on relevant and meaningful key actions/events under each competency heading rather than attempt to list general examples against each of the core behaviours.

You should assess yourself on the following five point scale in respect of each of the leadership competencies as a basis for discussion with your manager:

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| 5 | CONSISTENTLY EXCEEDS competency requirement | 4 | MEETS AND SOMETIMES EXCEEDS the competency requirement | 3 | MEETS the competency requirement | 2 | SOME aspects of competency requirement met | 1 | INSUFFICIENT evidence or evidence fails to meet competency requirement |
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| 1. Leading  Guiding and supporting the team to achieve agreed outcomes; creating a shared sense of common purpose for the team; delivering outcomes in ways consistent with the council’s values andguiding principles. | | |
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| Core Behaviours   * Take a clear and positive approach and work with the full support and involvement of the team * Build the team’s capacity to improve through working effectively together and sharing tasks * Act in ways that reflect the values of the council and encourage others to do the same * Encourage and promote a culture of high performance and improvement * Champion healthy working lives   Target Outcomes/Impact   * The team has clear leadership and direction which is improving the competency and performance capacity of employees | **Practical examples** | **Development Notes** |
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| 2. Motivating and supporting people  Building a supportive and productive relationship with team members to achieve team/service outcomes; focussing on achieving results through others; making the best use of the skills, knowledge and capabilities of others | | |
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| Core Behaviours   * Delegate wherever possible and enable team members to broaden their experience and capacity * Work actively to improve and maintain team morale and relations * Look for opportunities to develop individual and team capacity * Recognise success and ensure positive individual and team feedback * Promote the benefits of diversity and challenge discrimination, prejudice and bias   Target Outcomes/Impact   * ADR outcomes are positive/showing improvement * Team performance capacity is improving | **Practical examples** | **Development Notes** |
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| 3. Communicating and influencing  Communicating clearly and concisely and ensuring that information is understandable and relevant; building productive working relationships to support buy-in for team and service objectives; actively contributing to team decision-making; championing the goals and values of the council. | | |
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| Core Behaviours   * Engage effectively with customers and actively encourage the team to do the same * Earn the respect and confidence of others through supportive, fair and consistent behaviour * Build a culture that encourages two-way discussion and information sharing * Help team members to understand the bigger picture context of priority setting and policy decisions * Regularly review the effectiveness of communication channels   Target Outcomes/Impact   * Information is exchanged effectively through regular two way communication * The team and individual team members have a positive and productive relationship with customers * Engagement feedback from team members and customers is positive | **Practical examples** | **Development Notes** |
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| 4. Working together  Actively encouraging team members to work towards shared outcomes and aims; fostering team co-operation to achieve common goals; utilising the different skills and expertise within the team to achieve optimum customer service. | | |
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| Core Behaviours   * Encourage the team to work effectively with others * Use the diversity within teams to optimise customer outcomes * Use team/cross team discussion and dialogue to develop new ideas * Work and collaborate with others to build relationships that improve service provision and customer outcomes * Encourage and develop team awareness of wider service issues   Target Outcomes/Impact   * The team uses available resources effectively to achieve outcomes and performance standards * Team effort is focussed on delivering customer value and achieving service and council objectives | **Practical examples** | **Development Notes** |
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| 5. Managing change and problem solving    Reacting positively to workplace change and supporting individuals through the change process; anticipating problems that may affect performance and customer service and taking appropriate preventative/corrective action; implementing alternative approaches to improve customer service outcomes. | | |
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| Core Behaviours   * Ensure that teams are kept aware of planned changes * Anticipate the likely impact of change and plan accordingly * Encourage an open atmosphere and exchange of ideas when looking for solutions to problems * Gather and distribute information to support team decision making and problem solving * Monitor the progress and outcomes of change   Target Outcomes/Impact   * Change programmes are effectively managed and implemented * Solutions are found which effectively meet customer and business needs | **Practical examples** | **Development Notes** |
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| 6. Delivering effective outcomes    Focussing on team outcomes and customer service delivery; contributing effectively to overall service delivery; improving team service quality and effectiveness for customers; ensuring that the team delivers in ways consistent with the council’s values and strategies. | | |
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| Core Behaviours   * Give the team clear direction on delivery of service objectives * Make sure that team plans tie in effectively with service objectives * Ensure that team links with service priorities are communicated and understood * Use customer feedback to improve service quality and effectiveness * Develop flexible team structures that enhance customer service   Target Outcomes/Impact   * The team has delivered key outcomes and priorities * Team resources are managed effectively and efficiently * The standard of customer service is improving * The service has retained the Customer Service Excellence standard and has improved compliance against the standard | **Practical examples** | **Development Notes** |
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**⮹ Essential Knowledge/Skills Checklist**

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| --- | --- | --- | --- | --- |
|  | Knowledge and Skills | Meets job needs | Requires further development | Comments |
| 1. | Managing performance |  |  |  |
| 2. | Developing team capacity |  |  |  |
| 3. | Cost/budget monitoring |  |  |  |
| 4. | Change management |  |  |  |
| 5. | Delegation |  |  |  |
| 6. | Workforce management and planning |  |  |  |
| 7. | It literacy |  |  |  |
| 8. | Data and performance analysis |  |  |  |
| 9. | Customer orientation |  |  |  |
| 10. | Presentation and communication |  |  |  |

**Note**

The above categories represent the core knowledge and skill sets associated with your role profile and are intended to assist in identifying any development needs for inclusion in your Performance Development Plan. In assessing your current levels of competency in respect of each category, you should consider what is needed for effective performance in relation your job role e.g. you do not need to have an “expert” level of IT skills if your role does not require this.

However, you should aim for levels of competence in all categories to ensure you meet all of the job needs.

**⮹ Performance Development Plan**

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|  | **Development Need** | **Action** | **Timescale** | **Desired Outcome** | **Evidenced by** |
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**⮹ Process Sign Off**

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|  | **Manager’s Comments** |
|  | Overall Review Comments |
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|  | Specific Action Points |
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|  | Summary and Concluding Comments |
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|  | **Employee’s Comments** |
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