**DATA LABEL: OFFICAL -Sensitive**

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| **Appraisal and Development Review** |
| **Employee Template (A)**  **(To be completed by the employee prior to annual review meeting)** |



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

**⮹ Review Process**

This process is all about ensuring you are clear about what’s expected of you, how you’re expected to do it and how well you’re doing it. It also ensures that all aspects of your job are considered in giving you feedback and agreeing any performance development action required.

The process has three parts:

Employees should complete the process with their line manager using the guidance and documentation provided in accordance with the accompanying guidance notes.

**⮹ Work Review**

**Workplan Actions 1**

This section should be completed based on mainactionsset out inworkplans for the review period to date and should summarise progress against targets and objectives.

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| **Main Actions** | **Progress made against targets/objectives** | **Review Notes/Comments** |
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**Workplan Actions 2**

This section should be completed based on mainactionsplannedover the next review periodbased on agreed service/ workplan targets as discussed with the line manager.

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| **Main Actions Planned** | **Target Outcomes** | **Timeline** |
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**⮹ Key Result Areas and Core Competencies**

Key result areas and core competencies are the essential performance outcomes of your job – what you need to be doing well to perform effectively. 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.

This section requires the job holder to provide relevant examples of actions relating to each of the key result areas and associated behaviours.

*Line Managers should use their judgement to incorporate additional competencies and behaviours as appropriate to professional and/or technical competencies and standards required, using language that is familiar and appropriate to the employee concerned.*

*Care should be taken to ensure that all competencies and behaviours attributed to a job are relevant and necessary for the job to be performed to the required standards. Any additions should be discussed with HR in the first instance to ensure consistency with expected council competencies and behaviours.*

The levels below should be used to assess employee performance in each key result areas, following discussion with the line 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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| Job Knowledge and Skills  A consistent demonstration and application of required levels of job competency and skill. Developing knowledge and skill customer/client requirements. | | |
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| Behaviours and Competencies | Practical examples | Line Manager Comments |
| * Displays effective levels of required job knowledge and skill when performing role |  |  |
| * Actively promotes and applies good practice and standards as an example to others |  |  |
| * Willingly learns, develops and shares where the opportunity arises, learning from their mistakes and useful feedback. |  |  |
| * Uses knowledge and expertise to take the initiative in suggesting service improvements |  |  |
| * Follows work instructions and asks for explanations where needed to finish work within specific quality guidelines and timescales. |  |  |

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| Service and Customer Focus  Using skills and expertise effectively for the benefit of customers/clients taking account of customer feedback. | | |
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| Behaviours and Competencies | Practical Examples | Line Manager Comments |
| * Engages effectively with customers/clients and prioritising their needs when delivering a service |  |  |
| * Apply knowledge, skill and expertise in the best interest of customers/clients |  |  |
| * Respond effectively to operational problems ensuring the service meets quality and consistency standards |  |  |
| * Show respect and courtesy to customers and clients at all times, listening to their views |  |  |
| * Demonstrate a willingness to embrace change and new ways of working |  |  |

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| Communicating and influencing  Building productive working relationships to support a collaborative approach to effective service delivery | | |
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| Behaviours and Competencies | Practical Examples | Line Manager Comments |
| * Engage effectively with customers and actively encouraging other team members to do the same |  |  |
| * Earn the respect and confidence of colleagues through supportive and positive behaviour |  |  |
| * Share information readily and willingly in the best interests of service delivery and customers |  |  |
| * Provide information is accurate and use language relevant and appropriate |  |  |
| * Actively contributing to team decision-making |  |  |

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| Working Together  Working effectively as part of a team to deliver service outcomes and a “one service” approach to meet customer needs. Showing consideration and respect to others, complying with workplace health and safety standards. | | |
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| Behaviours and Competencies | **Practical Examples** | **Line Managers Comments** |
| * Work supportively with colleagues to ensure a “one service” approach |  |  |
| * Participate actively in team/cross team discussion to develop new ideas |  |  |
| * Keep colleagues informed on relevant issues in a timely |  |  |
| * Comply with health and safety standards and practices at all times, taking personal responsibility |  |  |
| * Respects the views of others treating everyone with dignity encouraging others to do the same |  |  |

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| Delivering Effective Outcomes  Achieving performance targets and outcomes in accordance with council values, standards and expected behaviours. Delivering agreed outcomes to time and quality standards. | | |
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| Behaviours and Competencies | Supporting Actions/Evidence | Line Manager Comments |
| * Achieves work targets and delivers agreed outcomes |  |  |
| * Works consistently to performance standards and service requirements |  |  |
| * Responds effectively to operational problems ensuring the service meets quality and consistency standards |  |  |
| * Meets all job-related performance standards and encourages other people to do the same. |  |  |
| * Acts in ways that reflect the values of the council and encourages others to do the same |  |  |

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| Use this section for any additional Key Result Areas and Competencies/Behaviours not covered by above | | | | | |
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| Behaviours and Competencies | Level | Supporting Actions/Evidence | Line Manager Comments | |
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**⮹ Performance Development Plan**

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|  | **Development Need** | **Action** | **Timescale** | **Desired Outcome** | **Evidenced by** |
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| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
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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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|  | Signature:  Date: |

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|  | **Employee’s Comments** |
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