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| Appraisal and Development Review |
| Employee Template B (To be completed by the line manager) |

**DATA LABEL: OFFICIAL - Sensitive**

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



**⮹ Review Process**

This process is all about ensuring employees are clear about what’s expected of them, how they’re expected to do it and how well they’re doing it. It also ensures that all aspects of their job are considered when giving feedback and agreeing any performance development action required. The process has three parts:

**⮹ Work Review**

This section should be completed based on mainactivitiesset out for the review period to date and should review progress against targets

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| **Main Activities**  | **Progress made against targets/objectives/standards**  | **Review Notes/Comments** |
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**⮹ Behavioural/ Competency Assessment**

Behaviours/competencies are the essentially what the employee needs to do well to perform effectively. Tick the box that applies at the end of each competency area.

| Job Knowledge and Skills | Core Behaviours and Competencies | Points to Consider | Line Manager Comments |
| --- | --- | --- | --- |
| * Displays effective levels of the required job knowledge and skill when performing role
 | * Able to work alone producing high quality work
* Competent worker
* Good problem solving skills
* Carries out the work as asked in the timescales given
 |  |
| * Actively promotes and applies good practice and standards as an example to others
 | * Complies and promotes good workplace practice
* Service delivered meets the expectations of customer
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| * Willingly learns, develops and shares where the opportunity arises, learning from their mistakes and useful feedback
 | * Receptive to feedback and willing to improve
* Evidence of improvement in skill/competency
* Develops others through coaching/ mentoring
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| 5 | Evidence CONSISTENTLY EXCEEDS competency requirement | 4 | Evidence MEETS AND SOMETIMES EXCEEDS the competency requirement | 3 | Evidence MEETS the competency requirement | 2 | SOME evidence of competency but GAPS or development required | 1 | NO evidence or evidence fails to meet competency requirement |
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| Service and Customer Focus | * Engages effectively with customers/ clients, prioritising their needs when delivering a service
 | * Implements actions based on customer feedback
* Gets the job done right first time with no rework
* Demonstrates good customer care, and encourage colleagues to do the same
* Neat and tidy WLC attire
 |  |
| * Respond effectively to operational problems ensuring the service meets quality and consistency standards
 | * Deals with customer problems preventing escalation
* Reports any customer concerns to manager as required
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| * Demonstrate a willingness to embrace change and new ways of working
 | * Willingly accept the need for change and adapt to new ways of working
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| Core Behaviours and Competencies | Points to Consider | Line Manager Comments |
| --- | --- | --- |
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| Communicating and Influencing  | * Provide information that is accurate and use language relevant and appropriate
 | * Communicates information effectively with colleagues
* Demonstrates good communication skills
* Communicates effectively when resolving an issue
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| * Actively contributing to team decision-making
 | * Participates in the team decisions
* Works supportively as part of a teams
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| Working Together | * Comply with health and safety standards and practices at all times, taking personal responsibility
 | * Takes responsibility for H&S and complies with Risk Assessments, Safe Systems of Work
* Anticipates H&S issues and acts to address them
* Reports Near Misses and Incidents
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| * Respects the views of others treating everyone with dignity encouraging others to do the same
 | * Treats everyone with dignity and respect, encouraging others to do the same
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| Delivering Effective Outcomes | * Achieves work targets and delivers agreed outcomes
 | * Consistently good timekeeping
* Consistently meets work deadlines and targets
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| * Works consistently to performance standards and service requirements
 | * Consistently produces good quality of work
* Works to service standards
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**⮹ Occupational Competencies**

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| --- | --- | --- | --- |
| **Core Occupational Competencies** | **✓** | **Optional Occupational Competencies** | **✓** |
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**⮹ Performance Development Plan**

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|  | **Development Need**  | **Action** | **Timescale** | **Desired Outcome** | **Evidenced by** |
| 1. |  |  |  |  |  |
| 2. |  |  |  |  |  |
| 3. |  |  |  |  |  |
| 4. |  |  |  |  |  |

**⮹ 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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| Signature: Date:  |