



proud to make a difference

Annual Appraisal (including the PROUD values)

Appraisee's Name

Appraisee's Role

Department

Appraiser's Name

Appraiser's Role

Date of Review

Period under review

Date Entered on ESR

Statutory/Mandatory training completed

Yes/No

Relevant **job specific competency** packages/CPD requirements completed

Yes/No/Not applicable

Performance Score

(1-5)

(see scoring criteria on page 2)

PROUD Values/behavioural score

(1-5)

(see scoring criteria on page 2)

Appraisal is an opportunity for the individual and those concerned with their **performance** – most usually their line manager - to get together to engage in a dialogue about the individual's performance, development and the support required from the manager

Appraisals provide an opportunity to reflect on past performance but are also a basis for making development and improvement plans.

Chartered Institute for Personnel Development 2010

Guidance for Appraisers

Appraisers should consider the following when discussing the employee's performance and setting future objectives and development needs. For further guidance on appraisals, see the appraisal web pages on the Learning and Development intranet site. It is important that all members of staff work towards achieving the Trust's aims and objectives as outlined in the Trust's Corporate strategy, Making a difference and individual objectives should reflect this i.e.

- Deliver the best clinical outcomes
- Provide patient centred services
- Employ caring and cared for staff
- Spend public money wisely
- Deliver excellent research, education and innovation

All staff are expected to demonstrate the PROUD values in all that they do.

| PROUD VALUES | EXAMPLES |
|---|---|
| Patients First Ensure that the people we serve are at the heart of what we do | <ul style="list-style-type: none"> • Gives outstanding service to patients/clients directly or through their supporting services • Includes patients/clients in making decisions to enhance their care • Cares for patients/people with courtesy, compassion, dignity and empathy • Ensures that the patients/people we serve are at the heart of all we do |
| Respectful Be kind respectful, fair and value diversity | <ul style="list-style-type: none"> • Contributes to open and honest culture • Listens and communicates respectfully towards patients, staff and visitors • Conduct themselves in a professional manner • Is kind, respectful and fair • Ensure inclusivity, valuing and respecting people's differences • Maintains patient and staff confidentiality |
| Ownership Celebrate our successes, learn continuously and ensure we improve | <ul style="list-style-type: none"> • Is committed and displays a 'can do' attitude • Takes responsibility for their own actions • Supports initiatives that help to deliver department and organisational goals • Celebrates successes • Invites and acts upon feedback received • Seeks to continually improve • Taking ownership of own personal development |
| Unity Work in partnership with others | <ul style="list-style-type: none"> • Commits to team values and goals • Shares skills and knowledge • Actively contributes to team performance • Supports and encourages colleagues • Works in partnership with wider teams • Inspires, positively influences and motivates colleagues |
| Deliver Be efficient, effective and accountable for our actions | <ul style="list-style-type: none"> • Delivers professional, efficient and effective services • Ensures value for money is considered in all they do • Works towards agreed objectives • Considers people and task to get results • Treats and cares for people in a safe environment • Is accountable for own actions |

SCORING CRITERIA

| Score | Performance | Score | PROUD Values |
|-------|--|-------|--|
| 5 | Excellent Performance / Exceeded Objectives Not only met all agreed objectives but delivered over and above by taking on and delivering additional objectives. | 5 | Exemplary example of displaying consistent PROUD behaviours |
| 4 | Good Performance / All objectives achieved Met all agreed objectives set at previous appraisal. | 4 | All positive PROUD behaviours observed |
| 3 | Satisfactory Performance / Majority of objectives achieved Most objectives met as set at previous appraisal. | 3 | Majority of positive PROUD behaviours observed |
| 2 | Poor Performance / Some of the objectives achieved Less than half the objectives met. | 2 | Some positive PROUD behaviours observed |
| 1 | Unsatisfactory / No objectives achieved None of the last years objectives met. | 1 | No positive PROUD behaviours observed |

Summary of Appraisal Discussion:

This summary should reflect the discussion and include as much detail as the appraiser feels necessary. However, it should record comments on performance for the period under review ie. objectives, PROUD behaviours, identified strengths and areas for improvements. Future work objectives and development needs should be recorded on the Performance & Development Objectives table attached.

Appraiser's comments

At the end of the appraisal discussion, overall scores for

- *performance*
- *demonstration of PROUD values/behaviours*

must be entered on the front sheet based on the scoring criteria

Career Aspirations

Please tick

- Continued development of current role
- Ready for progress now
- Potential in 3+ years

Comments :-

Appraiser's Signature

Appraisee's comments

Signature

**Senior Manager's Comments
(Appraiser's Line Manager)**

Signature

Performance & Development Objectives for forthcoming year from to
 (including PROUD behaviours, development and job related training needs)

| Objective | When will I achieve it? | How will I achieve it? | How will I know if I have been successful? |
|-----------|-------------------------|------------------------|--|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

NB photocopy this page if required

(to be photocopied and issued 2 weeks in advance of appraisal)

The employee guidance should be given to the appraisee at least 2 weeks in advance to enable them to prepare fully for their appraisal.

Employee Guidance

Preparing for your Appraisal

The questions below are intended to help you prepare for your Appraisal. It is not a form to be filled in but can be used to help you think about the past year and make notes to take to the appraisal meeting.

You can also review your job description and person

1. What were your work objectives for the last year?
 - a. What did you do well?
 - b. What examples can you think of to demonstrate this?
 - c. What has been less successful this year and why?
 - d. What examples can you think of to demonstrate this?
 - e. What could you have done differently?
2. Have you made progress in developing skills and knowledge?
 - a. In relation to your job
 - b. In relation to mandatory training
3. How have you demonstrated the PROUD values in your role in during the year?
4. What do you think your work objectives for the next year should be?
5. What are the job related skill and knowledge development needs that you have?
How can you fill your development gaps/learning needs?
6. What are your career aspirations?
7. Is there anything else you want to discuss at the meeting?