

1 2 3 4 5
Living our values

This is how we do things around here, This is how we Live Our Values.

**Performance & Development
Conversation**

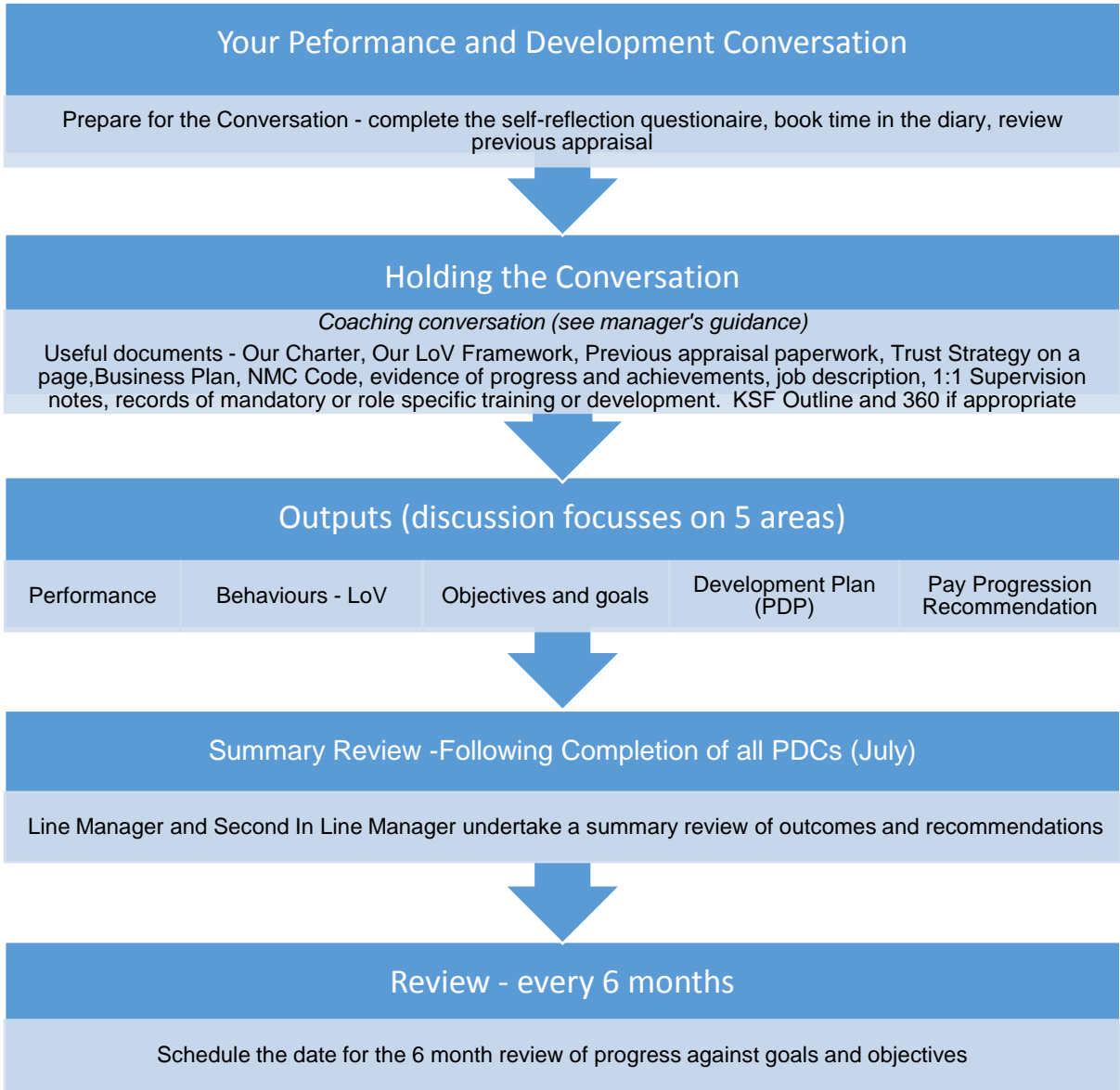
- Employee's Guidance

Employee Guidance - Your Performance and Development Conversation (PDC)

Before your next PDC please use the following guidance to help you to prepare and help ensure that the experience you have is a positive and meaningful one.

- Ensure you have familiarised yourself with the process by reading through the PDC paperwork; your manager will give you a copy beforehand. **The paperwork is available on the Trust website in the Policies section and there is also an online dvd briefing about the process.**
- Your manager will allocate some individual protected time beforehand to allow you some time to reflect on how you have progressed since your last review and will encourage you to complete the **self-reflection questionnaires, there are 2 of these to complete**
- Consider what additional information and evidence you might need to help prepare you for your PDC – this might include previous appraisal documents, job description, KSF outline or 360 feedback as appropriate, a copy of Our Charter, LoV Framework, the Trust Strategy on a page, Business Plan, NMC Code, notes of any 1:1s or supervision meetings, mandatory training or development or role specific training records, evidence of progress and achievements. **Consider the need for support in tri-angulation of information with a relevant professional lead if the person who is carrying out your appraisal is not from the same professional discipline as yourself.**
- Be mindful of the environment where you hold this conversation – use quiet and comfortable surroundings
- Once your line manager has completed the PDCs for all of your team, he or she will meet with their own line manager to undertake a summary review of all outcomes and recommendations within your team / department / directorate.

The flowchart on the next page will act as a useful reminder about the process.



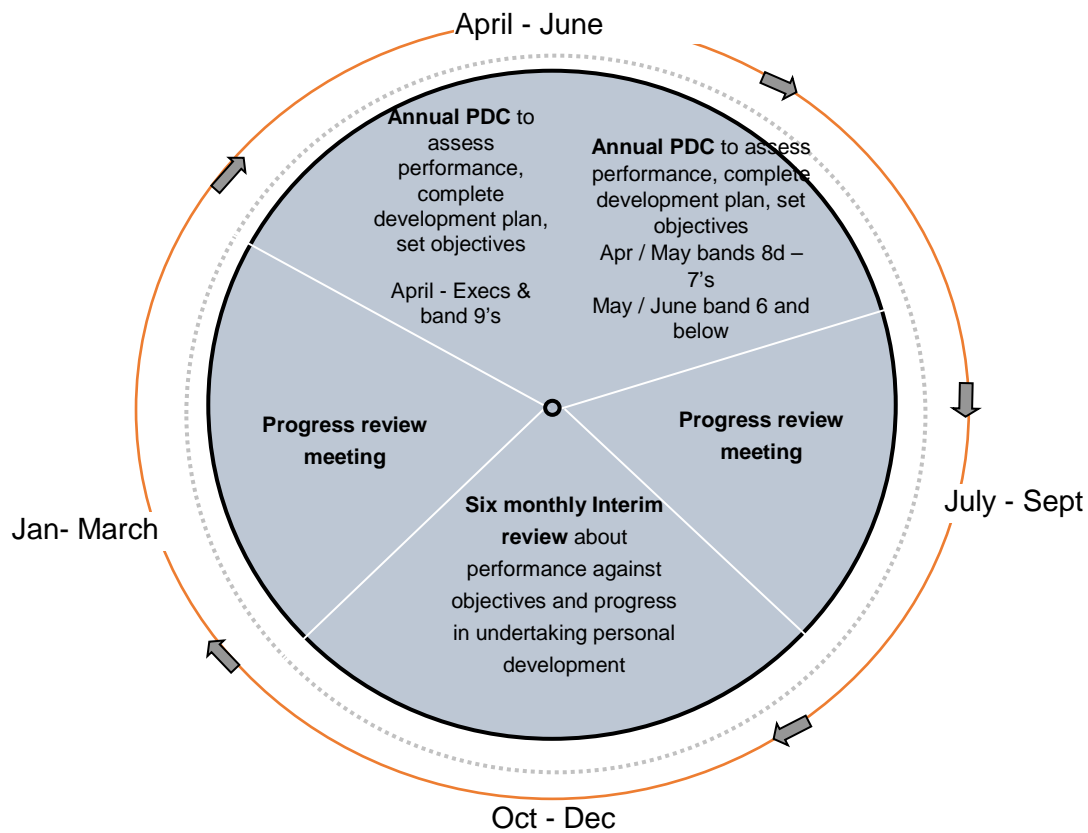
Evidence Based Behaviour Review (completed by manager / supervisor during PDC)

This section of the document should be completed by your manager before your PDC takes place but you should then be prepared to discuss it openly and honestly during the PDC and it might be helpful to refer back to the self-reflection questionnaire Part 2 in preparation.

Your manager will discuss with you where they have observed specific examples of behaviour (positive and negative). Any issues that have been identified previously should have been raised before and definitely should not be raised for the first time during the PDC.

Timeline of actions for PDCs and the annual review of pay awards

The PDC process has been streamlined with a structured timeline for the completion of PDCs and this is outlined in the diagram below.



PDCs and Pay Progression Recommendations / Decisions should be completed as follows;

If you are:-

- In an Executive or Band 9 role
- In a role at Bands 8a – 8d and 7
- In a role at Bands 1- 6

Your PDC should be completed in:-

- April, followed by progress reviews and a 6 monthly interim review
- April / May, followed by progress reviews and a 6 monthly interim
- May / June, followed by progress reviews and a 6 monthly interim review

Discussion regarding your overall performance

In this section of the PDC, your manager will discuss your overall performance with you and this will include referencing both your performance in role (objectives etc) and your behaviour in line with the Living our Values Framework (details of which are included in the PDC paperwork).

Performance + Values/Behaviours = Overall evaluation

Both you and your manager should discuss and complete the evaluation by marking a cross on the matrix on page 5.

There should be no surprises during the PDC. Any performance or behaviour issue / concern should have been raised with you as soon as they are observed to give you an opportunity to reflect and address them.

Pay Progression – Manager’s Recommendation

In this section of the PDC your manager will confirm their recommendation regarding your pay progression, again referencing both your performance in role (objectives etc) and your behaviour in line with the Living our Values Framework (details of which are included in the PDC paperwork).

The recommendation regarding pay progression will be effective on your next incremental date.

Setting Objectives

When it comes to performance objectives, your manager should try to limit these to around 6 and will use the SMART acronym to help ensure that they are clear and precise – by following these principles it should be easier to ensure that your objectives are clearly understood and therefore will be easier to measure and ultimately for you to deliver.

SMART stands for;

- **S**pecific to the individual
- **M**easurable
- **A**chievable
- **R**elevant and meaningful to the individual
- **T**ime-bound

Your objectives should consist of a mixture of those designed to stretch or develop you and some maintenance objectives. Your manager will have given some consideration to these before the PDC takes place and it will be helpful if you do the same.

Personal Development Planning (PDP)

In this section you will need to discuss and agree what learning and development interventions are appropriate for you for the next 12 months in line with the Trust’s Learning and Development Policy (Strategy). Any funding requests will need to be discussed as appropriate with the budget holder or senior manager prior to approval.

Comments

The form allows for comments by both the employee and your manager / supervisor and it is important that this section is completed with honest comments about the process and any particular issues that need to be addressed.