

**Employee: Job Title:**

**Line Manager/ Appraiser:**

**Job Title:**

**Department: Department:**

**Employee Tips:**

* This document is about your development and reflections.
* Include key points you'd like to discuss in the 'employee notes before' boxes.
* Bring the document along, your Manager will complete this on the day with you.

# Care Values

**Communicating and working together**

**C**

We will work as one compassionate and inclusive team, involving, informing and listening to all colleagues and local communities.

**Aspiring and improving**

**A**

We will choose to work or be cared for by Sherwood as we focus on improving patient care and staff well-being.

**Respectful and caring**

**R**

We will show kindness to all, embrace diversity and challenge inappropriate behaviours.

**Efficient and safe**

**E**

We will be consistent and do the right thing at the right time, first time.

**Date of Conversation:**

**Manager Tips:**

* This is a tool to support the conversation between you both.
* Allow time for you both to prepare, two weeks is recommended.
* Include key points of the discussion in the manager sections on the day.

# Annual Cycle

Do you feel able to ask for and receive support from colleagues and managers? Including a Wellbeing Conversation yes / no, if no what would help? Scan the QR code for the SFH Wellbeing and Welfare Support page.



**Employee:** Notes before

**Before the Appraisal begins: How are you? -** It's okay to reschedule, ensure it's the right time for the conversation.



**Manager:** Ask and capture key points below

**Date started in post:**

**Local Induction completion:**

**Expectations of the role clarified:**

**Mentor / buddy agreed and in place *(if needed):***

**90**

**First 90 Days in Role** *Including staff transferred internally or returning after 12 months*

If **not,** move to Section 1

**Employee:** Consider and bullet point notes before to discuss on the day.

**Manager:** These are to support the employee’s induction. Documenting a summary of the chat and agreed actions is good practice.

**30 Day Chat -** How is it going? Any further support or queries?

**Chat date:**



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**60 Day Chat -** Identify any additional support required and both discuss and agree on performance objectives for the year ahead. Write these on the next section.

**Chat date:**



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**90 Day Chat -** How is it going? What's gone well? What are you most proud of?

Any challenges and further support? **Chat date:**



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**Performance Objectives for the year -** Agree on performance objectives for the next 12 Months. Ensure they are specific, measurable, achievable, realistic and have a timeframe.

**90**

**First 90 Days in Role** *Including staff transferred internally or returning after 12 months*

If **not,** move to Section 1

|  |  |  |
| --- | --- | --- |
| **Performance Objectives (Task)** Link these to your role, the team and strategic priorities | **How will you do this? What support is needed?** | **When** |
|  |  |  |
|  |  |  |
|  |  |  |

## **Next** Work through, discussing at 1-2-1's and the 6-Month Review. When your Appraisal is due, move to Section 1: Looking Back

**Employee:** Consider and bullet point notes on what you would like objectives for the year to be.

**Section 1:** Looking Back

**Successes and Achievements -** What's gone well? What are you most proud of? What do you like about your role?



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**Performance Objectives -** Have they been achieved? Any challenges and key learnings?



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**Personal Development -** Have they been achieved? Any further development you have completed? Any challenges and key learnings?



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

**Emerging and Current Leaders -** How have you engaged, shared the vision and developed the team? Any further support needed?



**Manager:** Verbally give feedback, capture key points below

**Employee:** Notes before

## **Next -** Once completed continue to Section 2: Looking Forward - New Objectives

**Employee:** Consider and bullet points notes in the new performance objectives before.

**Section 2:** Looking Forward - New Objectives

**Complete Before: New Performance Objectives -** Consider what you would like your objectives to be for the next 12 Months.



**Employee:** Notes before

**Day of Discussion: New Performance Objectives -** Agree on performance objectives for the next 12 Months. Ensure they are specific, measurable, achievable, realistic and have a timeframe.

|  |  |  |
| --- | --- | --- |
| **Performance Objectives (Task)** Link these to your role, the team and strategic priorities | **How will you do this? What support is needed?** | **When** |
|  |  |  |
|  |  |  |
|  |  |  |

## **Next -** Once completed continue to Looking Forward - Personal Development

**Employee:** Consider and bullet point notes in personal development section before

**Section 2:** Looking Forward- Personal Development

**Complete Before: Personal Development -** Consider training opportunities for the next 12 Months to help you reach your full potential



**Employee:** Notes before

**Personal Development Plan -** Discuss and agree steps that help you develop.

|  |  |  |
| --- | --- | --- |
| **Area for development:**  The knowledge skills or behaviour to help you to your job better | **How will you do this? What support is needed?** | **When** |
|  |  |  |
|  |  |  |
|  |  |  |

**Talent Conversation -** Discuss and agree your 2 year plan that helps you develop and share knowledge with others.



**Manager:** Verbally give feedback, capture key points below

**Next -** Once completed continue to Section 3: Final comments and sign off

**Final Discussion Comments**

**Section 3:** Final Comments and Sign off

Date:

Signature:

Date:

Signature:

**Manager Comments:**

**Employee Comments:**

**Manager to complete**

**Date logged onto ESR: 6 month review date:**

|  |  |  |
| --- | --- | --- |
| **Question** | **Y/N** | **Information** |
| Subject to a live disciplinary sanction? |  | If yes then incremental pay progression should be stopped |
| Subject to sickness targets? |  | If yes then incremental pay may be stopped as part of the target discussion |
| 100% compliant with their mandatory training? |  | If no then incremental pay progression should be stopped |
| Being / been managed in line with the formal stages of the Trust's Capability Policy? |  | Incremental pay progression will stop for the period of the formal stages |
| Completed their annual criminal convictions Model of Declaration form? |  | If any concerns are presented on the form contact Operational HR |
| Completed their annual declaration / submitted a nil return on the Declaration of Interest system? |  | All staff are required to annually review and update their declaration of interests. Bands 7 or above employees with nothing to declare, must submit a nil return. |
| Copy of the document been logged in the employees personal file? |  |  |
| Copy of the paperwork been given to the employee within 14 days of completion? |  |  |

**Next -** Once completed have regular 1-2-1's and review at 6 Months