



My Appraisal Document

Best NHS Acute Trust in the Midlands to work for since 2018.

Employee:	<input type="text"/>	Line Manager/ Appraiser:	<input type="text"/>
Job Title:	<input type="text"/>	Job Title:	<input type="text"/>
Department:	<input type="text"/>	Department:	<input type="text"/>
		Date of Conversation:	<input type="text"/>

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.

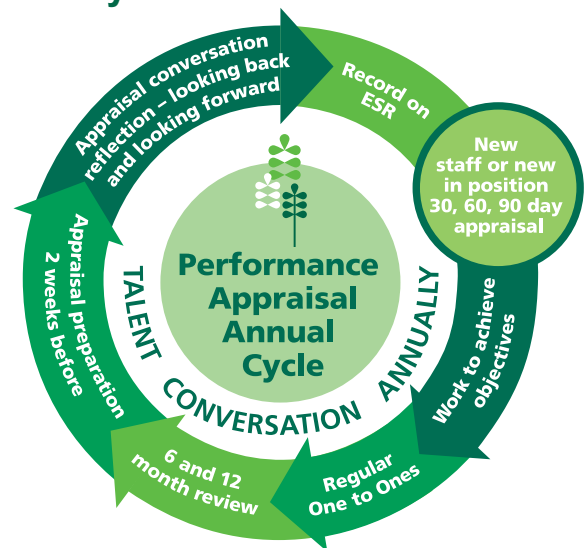
Manager Tips:

- 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.

Care Values

- C Communicating and working together**
We will work as one compassionate and inclusive team, involving, informing and listening to all colleagues and local communities.
- A Aspiring and improving**
We will choose to work or be cared for by Sherwood as we focus on improving patient care and staff well-being.
- R Respectful and caring**
We will show kindness to all, embrace diversity and challenge inappropriate behaviours.
- E Efficient and safe**
We will be consistent and do the right thing at the right time, first time.

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



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

If not, move to Section 1

Date started in post:

Expectations of the role clarified:

Local Induction completion:

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





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:


Employee: Notes before 


Manager: Verbally give feedback, capture key points below 

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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:


Employee: Notes before 


Manager: Verbally give feedback, capture key points below 

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90 Day Chat - How is it going? What's gone well? What are you most proud of? Any challenges and further support?

Chat date:

Employee: Notes before 

Manager: Verbally give feedback, capture key points below 

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


If not, move to Section 1

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.



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

< Section 1: Looking Back

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



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

Employee: Notes before 	Manager: Verbally give feedback, capture key points below 

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

Employee: Notes before 	Manager: Verbally give feedback, capture key points below 

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


Employee: Notes before 	Manager: Verbally give feedback, capture key points below 

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


Employee: Notes before 	Manager: Verbally give feedback, capture key points below 

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

> Section 2: Looking Forward - New Objectives

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

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



Section 2: Looking Forward- Personal Development

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


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

✓ Section 3: Final Comments and Sign off

Final Discussion Comments

Employee Comments:		Manager Comments:	
Signature:	Date:	Signature:	Date:

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