

Appendix C

Corporate Appraisal Form

Use this form to record the key points of the annual appraisal meeting and the six month appraisal review meeting.

This blank form is designed to be completed electronically.

Name of Employee	
Name of Appraiser	
Date of Appraisal	
Date of Six Month Review	

Guidance Notes

The purpose of the annual appraisal meeting is to:

- A.** Review achievements in the past 12 months against the objectives set at the last appraisal meeting, the six-month review and/or other objective-setting meeting;
- B.** Review individual competencies against the WBC standards framework for employees and, where appropriate, the WBC standards for leaders and managers;
- C.** Determine SMART objectives for achievement over the next year. For managers these will include targets related to Corporate Health Indicators and Key Performance Indicators;
- D.** Review learning and development over the past 12 months, and identify current and future learning needs and how these will met over the next period (the Personal Development Plan);
- E.** Discuss other factors relevant to work performance and planning (career aspirations, retirement plans etc).

The purpose of the six month review meeting is to review progress on the work objectives and the Personal Development Plan, note achievements and set new or revised objectives as necessary.

It is the appraiser's responsibility to:

- **Complete the appraisal form promptly following the annual appraisal meeting and six-month review meeting;**
- **Provide a copy, no later than 10 working days after the appraisal meeting, to the employee for their comments and signature;**
- **Provide a final signed copy of the form to their own line manager after the annual appraisal meeting.**

Part A – Review of objectives and achievements

Objective (set at last appraisal or six month review)	Evidence of achievement		Importance High/Medium
	Appraiser's comments	Appraisee's comments	

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Other significant achievements during the past 12 months	Evidence of achievement		Importance High/Medium
	Appraiser's comments	Appraisee's comments	

Part B – review of competencies against WBC standards framework

WBC Standard (see appendix for full details)	Evidence of competencies	
	Appraiser's comments	Appraisee's comments
Working with people		
Learning and development		
Approach to work		
Managing performance (managers only)		

Part C – Objectives for next 12 months

Objectives should be Specific, Measureable, Achievable, Relevant and Time-bound (SMART)

- *For managers, these should include objectives related to the achievement of relevant Key Performance Indicators (KPIs) and Corporate Health Indicators (CHIs)*
- *For all employees, consider the principles and priorities set out in the Council Strategy*
- *Each objective should be rated High or Medium (identify no more than 3 or 4 with High importance)*
- *New objectives may be added at the six month review meeting*

SMART objectives set at <u>Annual Appraisal</u>			Importance High (H) or Medium (M)	Six month review comments
Objective	Key activities and dates	Expected outcome(s)		

SMART objectives set at <u>Six Month Review</u>			Importance High (H) or Medium (M)
Objective	Key activities and dates	Expected outcome(s)	

Part D – Review of learning and development

Development objective set at last appraisal/six month review, or at other time during the year	Activity undertaken and associated costs	Evidence of impact on individual and team/service/directorate/organisation	
		Appraiser's comments	Appraisee's comments

The following link will take you to the full corporate training matrix [Intranet - Mandatory Training Courses](#) which also includes mandatory courses that do not need to be refreshed.

Personal Development Plan for next 12 months (also use this section for objectives set at six month review)

Development objective	Actions which will achieve the objective	Date(s)	Costs	Six month review comments

Part E – Career planning and other issues

Record discussion points on career aspirations, retirement plans and/or other issues in the box below.

Comments and signature

	Comments on this appraisal review	Signed	Date
Appraisee			
Appraiser			
Appraiser's Manager			

A copy of the completed appraisal should be retained confidentially by the appraisee and appraiser

Appendix 1 – WBC framework standards for competencies

The following competencies are expected of all employees of West Berkshire Council.
Managers and leaders are also expected to display the competencies listed under 'leaders of people'.

	All employees	Leaders of people
When working with people	Display respect for customers/clients/colleagues Work as part of a team to achieve goals Listen to other points of view Deliver a high standard of customer service Communicate effectively	Understand stakeholders' motivation and objectives Be a skilled influencer (communicate the vision and objectives, inspire and motivate, develop buy-in and trust) Expect, encourage and support high standards of performance from team members Use a range of leadership styles appropriate to individual team members and the situation Develop team working and a sense of common purpose; manage conflict
In relation to learning and development	Learn continually through experience Seek opportunities to improve skills and understanding Coach and guide colleagues	Actively develop the team to meet current and future challenges Encourage team members to reflect on experience and learning; actively encourage transfer of learning Seek feedback on own performance to improve self awareness and own development needs
In their approach to work	Focus on priorities Work to the best of his/her ability Strive to deliver high standards Use initiative and seek creative solutions Display integrity and openness Ensure own personal safety and that of others in the workplace	Be a role model (demonstrating drive, purpose, integrity, fairness, enthusiasm, openness, resilience) Adapt to change, taking prompt and appropriate remedial action where required
When managing performance		Set/agree clear objectives, and quality and performance measures (for tasks and staff)

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	All employees	Leaders of people
		Monitor and evaluate budgets, staff performance, and objectives Recognise good performance, and challenge underperformance and conduct Develop and empower team members to make decisions (coaching)