**PERFORMANCE REVIEW DISCUSSION**

**Introduction**

It is a mandatory requirement that everyone within Dudley MBC will have an annual Performance Review Discussion (PRD). Each PRD should take place between April and July. A business case needs to be presented and signed off by the Chief Officer for any service not able to comply within this time frame. There are separate Guidance Notes to aid this process. The PRD is comprised of 3 sections with extra space provided for any additional comments. There are separate supplementary guidance notes to support managers and employees with completing the PRD.

**Section 1 - Looking back – Employee & Managers Feedback**

In this section employees and their managers are asked to separately describe how the employee has performed over the last 12 months. Both should complete this section **before** the PRD takes place to allow full discussion around the employee’s objectives and how they have performed during the period under review. When bought together this guides the discussion and allows dedicated time to review the employees work. Managers will make notes of the employee’s comments and include them on their paperwork. This will reflect both versions to create one PRD document.

**Section 2 - Communicating the Fundamentals**

This section has been specifically designed to allow managers to choose and discuss only the relevant organisational, directorate and team fundamentals that are applicable to each employee’s role. There is space to record any additional comments made. **This section will be regularly updated to reflect the Councils current priorities.** Managers are asked to ensure they are using the most up to date PRD form by always downloading the current version off the website.

**Section 3 – Looking Forward – PRD Action Plan**

The PRD Action Plan which should be completed together **during** the PRD meeting, will record the employees objectives for the next 12 months together with any learning needs.

## YEAR:

**One Council building an effective and dynamic organisation**

*Employee's Name*

*Job Title ­­­­*

*Line Manager*

*Date of Discussion*

**This is intended to be a "working framework" for the Performance Review Discussion. It is the minimum requirement expected. However it is not a rigid guideline; both employees and** **managers may add for themselves whatever detailed arrangements suit them best.**

**Section 1 - Looking back – Employee & Manager’s Feedback**

**Employees** need to answer each question about their work performance over the last 12 months. **Managers** need to answer each question based on how they think the employee has performed over the last 12 months; this forms the basis of discussion.

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| **Employees feedback** | | **Questions** | **Managers feedback** |
|  | **1** | Describe Performance over the last 12 months with examples of main achievements & the impact on customers colleagues and the service |  |
|  | **2** | Areas where performance could have been improved |  |
|  | **3** | Any agreed objectives not achieved and why |  |
|  | **4** | What has been learnt during the last 12 months and what could be done differently as a result |  |

**Any additional comments**

**Section 2 – Communicating the fundamentals**

1. **Organisational fundamentals – discuss with all employees**

* Discuss the ‘Golden Thread’ - Council/Directorate/Divisional/Team plans
* Values & Behaviours ([Link to Values & Behaviours Self Assessment Toolkit](https://connect.dudley.gov.uk/documents/_layouts/15/WopiFrame.aspx?sourcedoc=/documents/shared/Learning-and-Development/Values%20and%20Behaviours%20self%20assessment%20tool.xlsx&action=default) – *for optimum use, please select the ‘Open in Excel’ Option and select ‘Edit’.)*
  + Use the framework to consider how values & behaviours have been applied by the individual in the workplace
* Any safeguarding issues to be considered
* Information Governance - discuss considerations needed to protect the council
* Feeling Valued
  + explore if the employee feels they have a voice and are able to contribute ideas and feel valued
  + does the employee feel they have the information they need to undertake their job

1. **Directorate fundamentals – explore with employees dependant on role**

* Wellbeing
  + discuss any issues that have an impact on the wellbeing of the directorate e.g. reduction of staff/teams/office accommodation
* Health & Safety
  + are there any issues to be explored that has an impact on the directorate
* Political Awareness
  + raising the employees awareness of anything that has a direct impact on the Directorate
* Equality
  + Impact assessments following any changes to service provision
  + training
* Systems
  + discuss any system changes or requirements for the role
    - Aggresso, TalentLink etc
  + learning requirements

1. **Team fundamentals – discuss anything that affects the individual or team**

* Discuss any service changes now and for the next 12 months
  + the impact on the employee
  + any implications for the team
  + implications for the future any moves etc
* Individual Wellbeing
  + how the employee feels about anything discussed
  + any ongoing support required by the manager
* Any other headlines
* Now you are more aware of what the future holds, is there anything more you need from me or anything that I need to do differently.

**Any additional comments**

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| **Performance Review Discussion**  **Part 1: – Looking forward - Objectives for 20­­ /20** | | | | | | | | | | |
| **Name:** | | | **Directorate:** | | | | | **Payroll No:** | | |
| **Job Title:** | | | **Division:** | | | | | **Telephone No:** | | |
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| **What do I need to do (Objectives)** | | | **When do I need to do it by (Target Date)** | **How will I know when I have achieved this? (success criteria)** | | | | **What support do I need? (development, 1-1, training)** | **Review dates** | |
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| **Part 2: - Further support or development you need to help you achieve your objectives?** | | | | | | | | | | |
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| **Part 3: - Any other comments by: Manager and/or Employee** The manager can record any comments to support the detail of this plan including comments from the employee. | | | | | | | | | | |
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| **Employee’s signature:** |  | **Print name:** |  | | **Date:** |  | **Are there any performance issues that need to be actioned?** | | |  |
| **Manager’s signature:** |  | **Print name:** |  | | **Date:** |  | **Date meeting arranged to discuss Performance issues:**  **(please insert date)** | | |  |