Section 4: Annual Performance and Development Review Completion Forms

4.1: Annual Performance and Development Review Completion Form

If you have completed an appraisal on a 1:1 basis, this is the **only** form you need to complete and return to the Training and Learning Team. The Reviewee (staff member who is having the appraisal) and Reviewer (Line manager or senior staff member conducting the appraisal) should both sign the form to show that everything that has been discussed is in agreement. You should only return the completion form. You should keep a copy of the completed appraisal in the staff members personal file and also share a copy with the reviewee.

4.2: Annual Performance and Development Review Completion Form Team Review

Some departments complete annual performance and development reviews in a team setting. This is common in areas such as catering and domestics. This form is designed to list all the staff members (reviewees) who were present at the team review they should they sign the annual safeguarding declaration.

You should only return the completion form. You should keep a copy of the completed appraisal in the staff members personal file and also share a copy with the reviewees.

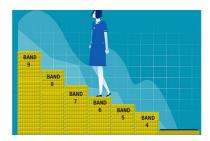
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	Please keep a cop	y of all the APDR document	ation for your records.		
Date of Review:	Department:		**ANNUAL SAFEGUARDING DECLARATION**This <u>must</u> be signed by all staff		
Employee Number:	Name of Reviewee (Please Print)	: Reviewee Signature:	I confirm that I have not received a caution, criminal conviction or been barred from working with children or vulnerable adults since my DBS or my last declaration	I have received a caution, criminal conviction or been barred from working with children or vulnerable adults since my DBS or my last declaration	
			and decourations	aux occorron	
Reviewer Name:		er Job Title:	Reviewer Signature:		

Section 5: Pay Step Progression

The pay step progression review meeting is separate to the appraisal. This section of the appraisal is a check list reminder to ensure that the reviewee is on track to progress to the next pay point when their pay effecting pay point is due.

This section of the paperwork is an opportunity to check the reviewees pay step date. This information can be found on the individuals ESR portal and on the monthly appraisal report that is sent to the manager with compliance responsibility within the department.



Additional Information

The Annual Performance and Development Review Policy can be found on the intranet along with additional guidance from A Kind Life and the appraisal forms.

Submit all appraisal forms to ldh-tr.bh-appraisals@nhs.net





Bedfordshire Hospitals NHS Foundation Trust Non-Medical Appraisal Documentation Guide

This booklet is designed to support both the reviewer and reviewee navigate through the appraisal documentation.

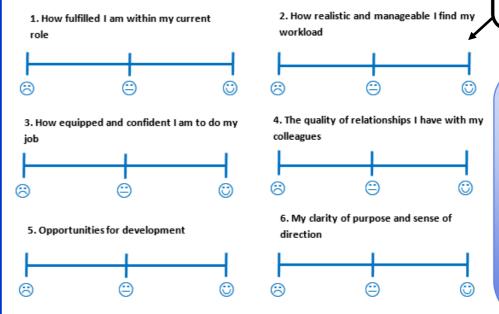
Support for conducting effective appraisals, tools and techniques can be found in the "Appraise with Values Guidance" and the e-learning package on ESR "418 Bedfordshire Hospital NHS FT – Appraise with Values E-Learning".

Section 1: Reflect

Section 1 is designed for the staff member who is undertaking the appraisal to reflect on the previous year.

The reviewee should complete section 1 prior to the appraisal review meeting. This will enable the reviewer and reviewee to have an open and honest conversation about the previous year and the staff members wellbeing.

Section 1:1: About me



The Reviewee should rate on the scale how they are feeling at work.

Reflection point!

The reviewee should answer the 2 questions under this review point around wellbeing and areas of their work they find most rewarding.

This will stimulate discussion at the review.

4

Section 1.2: The 4 S's

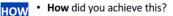
- Appraise with Values is intended to be a helpful conversation
- First talk about successes: what's gone well in the previous period, where the employee has successfully supported our ethos and met their objectives or development goals
- Then review together examples of where the employee has struggled to meet objectives or development goals, and has not been able to support our ethos and in the context of these examples together discuss, identify and set goals to be achieved in the coming year, along with any development needed to meet those goals
- Discuss the support that might be need including support from your manager, your health and wellbeing and for potential career progression

In the context of our Trusts ethos "every patient matters" ...



Successes

What are you proud of, what are your successes?



- √ Your skills
- √ Your strengths
- √ Your promotion of EDI
- ✓ Living up to our values



Struggles

- What have you struggled, with / not met your goals?
- How come this happened?
- X Your skills X Your strengths
- X Your experience of EDI

Set goals

- What goals should we set together for 6 – 9 months?
- How will you develop?

+ Living up to our values

- + Your skills
- + Your strengths
- + Growth through EDI
- X Living up to our values



Support

- What support do you need to meet your goals?
- How can we help?
- Support from your manager
- Support for your wellbeing
- Support for promotion or

Further detail on the 4's can be found in the Kind Life "Appraise with Values" guidance and also on the e-learning package on ESR: 418 Bedfordshire Hospital NHS FT - Appraise with Values E-Learning

Section 1.3: Reviewing my goals and work objectives

As a reviewee, you should reflect on your achievements against the objectives set at the previous annual performance and development review. The reviewer should also reflect on the reviewees achievements and areas for improvement. A informative discussion can then be had to reflect on the previous year.

Previous Objective	What did I achieve to complete/ work towards this?	Are there any additional actions to achieve/ further develop this objective?	Partially or not met / meeting	Met or meeting	Exceeded / exceeding	Not Applicable
Employees with supervisory responsibilities for staff must lead and support their teams effectively						
To deliver or support safe and up to date patient care and services		_				
To deliver or support the Trust objectives through demonstrating the Trust Values						

Section 2: Summary of appraisal conversation

2.1: Individual Goals and Objectives

In this section you should consolidate previous discussions from the 4's and reflections from the previous years objectives to set new and agreed objectives for the next 12 months.

2.2: Personal Development Plan

This section of the Annual Performance and Development Review documentation allows you to reflect on your development and/or learning needs for your own personal development within your job role and beyond. Maintaining skills and keeping up to date with current practices is just as important as further development.

Any development that requires funding should be put on the annual Training Needs Analysis, if this is an in year requirement please contact the Continued Professional Development (CPD) coordinator on CPD@ldh.nhs.uk . CPD is now coordinated centrally irrespective of a staff members-based site.

2.3: Mandatory / Statutory Training and

Appraisal Compliance

Ensure that all statutory and mandatory training is completed prior to the appraisal. If the reviewee is responsible for managing others, all appraisals that they are responsible for must be up to date.

erformance supervision of staff through team or 1 To deliver or support safe and up to date patient care and services I 2 months

To deliver or support the Trust objectives through demonstrating the Trust Values

To deliver or support the coming statutory and mandatus, and the comin

What do I want to learn?	What do I have to do?	What support & resources will I need?	How will I measure success?	Target date for review?	

Training	Yes	No	N/A	Comments/ Mitigating Circumstance
Is 90% of training up to date at the				
time of review?				
All Annual Performance &				
Development reviews are				
completed				

Section 3. Additional Clinical Review forms – These forms may not be applicable to all staff. If not applicable, please progress to section 4

3.1: Student Mentors, Practice Supervisor/ Assessor and/or Practice Educators

If you fall in one of the above categories then you should review how you have performed in the last 12 months against the educational equity and excellence framework

3.2: NMC Revalidation

If you are an NMC registrant you should have a conversation regarding your portfolio and anything you need to do to ensure that your registration does not lapse.

3.3: HCPC Revalidation

If you are an HCPC registrant you should have a conversation regarding your portfolio and anything you need to do to ensure that your registration does not lapse.