

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.

4.1 Annual Performance and Development Review Completion Form

Once the APDR is completed and signed, please send a copy of this page **only** to the Training and Learning Team: ldh-tr.bh-appraisals@nhs.net

Please keep a copy of all the APDR documentation for your records.

Date of Review:	Employee No:
Reviewer Full Name:	Reviewer Job Title/ Department:
Reviewer Signature:	
Reviewee Full Name:	Reviewee Job Title/ Department:
Reviewee Signature:	

****ANNUAL SAFEGUARDING DECLARATION**** This must be signed by all staff

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. Confirm this statement by ticking the box provided.

I have received a caution, criminal conviction or been barred from working with children or vulnerable adults since my DBS or my last declaration. Confirm this statement by ticking the box provided.

Has a discussion regarding revalidation taken place during this APDR? Yes No N/A

Band 7 and above only:
Has the Declaration of Interest for Year 20.../... been completed on ESR? (Band 7 and above are required to complete the DOI each year on ESR. If you have nothing to declare you are still required to confirm on ESR that you have 'none to declare') Yes No N/A

If the Reviewee is a band 7 or above, would they like to be nominated for a SSOP approval? Yes No N/A

Summary of Overall Performance:

Has Exceeded Expectations
Pay Step Progression Meeting to go ahead as planned. No foreseen circumstances to stop pay progression at time of the review.

Has Met Expectations
Pay Step Progression Meeting to go ahead as planned. No foreseen circumstances to stop pay progression at time of the review.

Has Not Met Expectations
The Reviewee has not met expectations. If the Reviewee is due for a Pay Step Review, they will not be incrementing onto the next pay step. In order to approve or suspend pay progression, a Pay Step Submission Form should be completed and returned to Training & Learning.

Upheld Capability sanction(s)

Upheld Disciplinary sanction(s)

Not performed job role to required standards

Not performed Trust Core Values as required.

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.

4.2 Annual Performance and Development Review Completion Form TEAM REVIEW

Once the APDR is completed and signed, please send a copy of this page **only** to the Training and Learning Team: ldh-tr.bh-appraisals@nhs.net

Please keep a copy of all the APDR documentation for your records.

Date of Review:	Department:	Reviewer Signature:	**ANNUAL SAFEGUARDING DECLARATION** This must be signed by all staff
Employee Number:	Name of Reviewee (Please Print):	Reviewer 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. <input type="checkbox"/> Confirm this statement by ticking the box provided. I have received a caution, criminal conviction or been barred from working with children or vulnerable adults since my DBS or my last declaration. <input type="checkbox"/> Confirm this statement by ticking the box provided.
Reviewer Name:	Reviewer Job Title:	Reviewer Signature:	

Pay step review meetings should be held on a 1:1 basis.

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

Appraise with values

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

1. How fulfilled I am within my current role



2. How realistic and manageable I find my workload



3. How equipped and confident I am to do my job



4. The quality of relationships I have with my colleagues



5. Opportunities for development



6. My clarity of purpose and sense of direction



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.

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** • What are you proud of, what are your successes?
- HOW** • How did you achieve this?
- ✓ 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?
- ✗ Your skills
 - ✗ Your strengths
 - ✗ Your experience of EDI
 - ✗ Living up to our values



Set goals

- What goals should we set together for 6 – 9 months?
- How will you develop?
- + Your skills
 - + Your strengths
 - + Growth through EDI
 - + 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 progression

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 / exceeded	Met or meeting	Exceeded / exceeding	Not Applicable
Employees with supervisory responsibilities for staff must lead and support their teams effectively			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To deliver or support safe and up to date patient care and services			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
To deliver or support the Trust objectives through demonstrating the Trust Values			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

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) co-ordinator on CPD@ldh.nhs.uk. CPD is now co-ordinated 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.

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.

Goal and objective setting for the next 12 months

Summarise the key goals, priorities or objectives for you over the next 12 months. This includes goals that relating to your career, personal development and wellbeing. Corporate objectives are already set out in this paperwork.

Objective (What needs doing?)	Target Date (By when?)	Action Plan including milestones (How will you achieve this objective?)	Success Measures (How will you know you have achieved this objective?)	Review Date
Employees with supervisory responsibilities for staff must lead and support their teams effectively	Throughout the coming 12 months	Undertake regular performance supervision of staff through team or 1-1 meetings Undertake all annual performance and development reviews (appraisals) for all staff within the required time scale.	Staff will report in their annual reviews that they feel supported. Appraisal compliance will be 90% or more. Records will show 1-1/ team supervision has taken place. Audits will show quality reviews and meetings have taken place	
To deliver or support safe and up to date patient care and services	Throughout the coming 12 months	By undertaking all statutory and mandatory training requirements	Evidenced by an up to date Electronic Staff Record (ESR) learning history.	
To deliver or support the Trust objectives through demonstrating the Trust Values	By the next annual review (12 months)	Demonstrating the values and behaviours in day to day working	Successful demonstration of values	

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?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
All Annual Performance & Development reviews are completed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

