

right roles, at the right time and can offer the right opportunities and support.



VALUES-BASED APPRAISALS

Let's talk about your potential



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What is Values Based Appraisal?

Cardiff & Vale UHB is a values-based organisation and as such has developed staff support around these values, recognising the importance of the behaviour of staff demonstrating the values that have been set.

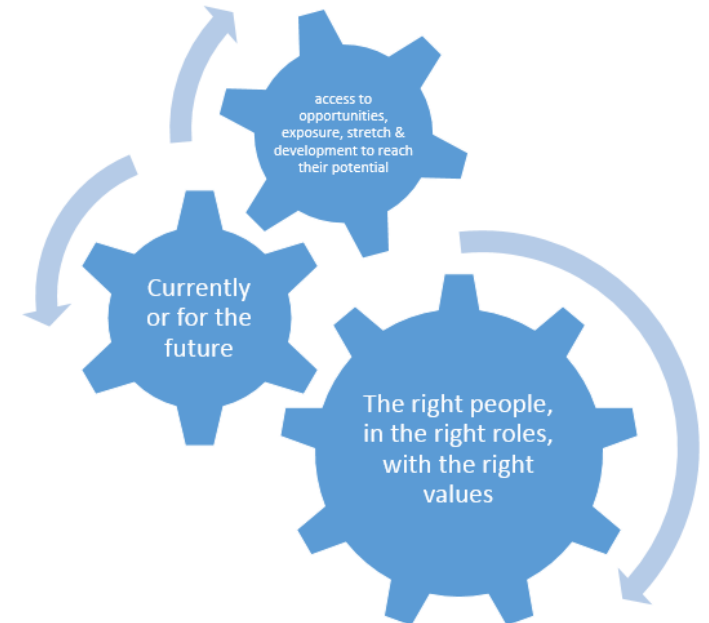
Our staff are our most important asset, and as an organisation we want to develop and nurture you to have the skills and confidence to live up to our values every day.

Supporting and encouraging our staff to explore their career potential is important to allow us to develop a workforce that is sustainable and fit for the future as the way we deliver care changes.

It's all about the right people, in the right roles, with the right values.

Values Based Appraisal (Appraisal) is for everyone and is a focussed conversation around development and recordable outcomes for staff. Your appraisal should cover the development you need, the value you bring, and the position(s) that best suit your skills now and into the future.

Conversations about values, behaviours and performance are an important means of communication and should happen at every meeting between managers and staff but the annual Appraisal is designed to reflect on progress over a longer period and map out the future.



Why should I take part in Values-Based Appraisal?

The key element to any successful Appraisal in maximising your potential is when you are able to have open and constructive conversation with your manager to discuss; where you are now, where you want to be, and how to be supported to get there.

Values-Based Appraisal is one part of Cardiff & Vale's Succession Planning Strategy and as such links directly to the organisations vision and strategic objectives.

The formal Appraisal is not 'in addition' to management responsibilities – it is a fundamental part of every manager's responsibility and every staff member is entitled to an annual review. Appraisal is part of 'how we do things around here' with everyone taking personal responsibility for the success of the organisation as a whole, not just individual jobs or areas.



Key principles

Cardiff & Vale UHB is committed to the personal and professional development of all staff. Making sure that all staff receive a Values Based Appraisal annually and regular one to one's in between is a vital part of this. Taking part in the Appraisal process is compulsory and will be conducted between you and your line manager.

The outcome will be work related objectives that are set for the period of one year and reviewed during your regular one to one meetings. The process seeks to ensure that all staff uphold the Cardiff & Vale UHB values by working and behaving in a way that reflects the values.

Appraisal outcomes will be recorded on ESR to allow any development to be incorporated in the Cardiff & Vale UHB Organisational Development and Training Plan. The Appraisal is one stage of the Cardiff and Vale UHB Talent Management and Succession planning process. There will be equity of access to agreed learning and development regardless of grade, full or part time status, gender, ethnicity, disability and age.

The best practice principles are:

- We will agree and understand what's expected of us in terms of what we should be doing and how we should be doing it
- We will all receive constructive and timely feedback on how we have done
- We will all ensure that we actively seek to develop and improve what we are doing for the benefit of patients



What to Expect

The appraisal tool is an important first step in discussing your potential with your manager; it will guide your conversation about your continuing career journey.

Prepare for the conversation in advance so that you come away from it with a clear sense of direction and the support that you need from your manager.

Here are the steps:



Cardiff & Vale UHB Values & Behaviours Framework

OUR VALUES	OUR BEHAVIOURS	
	How we are with patients, families, carers and colleagues	
	What we want to see from individuals and teams...	What we don't want to see from individuals and teams...
Kind and caring		
Welcoming	<ul style="list-style-type: none"> We will smile, be friendly, welcoming, polite and approachable 	<ul style="list-style-type: none"> We will not be abrupt, rude, show aggressive behaviour, shout or bully
Put people at ease	<ul style="list-style-type: none"> We will put others at ease, be patient, calm and reassuring 	<ul style="list-style-type: none"> We will not ignore people or fail to offer support and we won't leave people scared and anxious
Value other people's time	<ul style="list-style-type: none"> We will make time for people, consider their needs and make people feel comfortable 	<ul style="list-style-type: none"> We will not be 'too busy', in a rush or say we can't make time for others
Compassionate	<ul style="list-style-type: none"> We will be kind, compassionate and look out for others 	<ul style="list-style-type: none"> We will not make people feel stupid, belittled or treat people as an inconvenience
Respectful		
Understanding	<ul style="list-style-type: none"> We will put ourselves 'in other people's shoes' and show empathy and understanding 	<ul style="list-style-type: none"> There will be no hierarchy, no egos, no lack of understanding for others' needs
Attentive and helpful	<ul style="list-style-type: none"> We will be helpful and attentive to the needs of others, protect people's dignity and respect people's time 	<ul style="list-style-type: none"> There will be no poor planning and inefficiency, we will not waste people's time or keep people waiting
Respectful	<ul style="list-style-type: none"> We will value everyone as an individual and treat people equally and fairly 	<ul style="list-style-type: none"> We will not put people under pressure or show favouritism, not be unfair or leave people feeling disempowered
Appreciative	<ul style="list-style-type: none"> We will recognise people's strengths, say thank you and celebrate success, empower and bring out the best in others 	<ul style="list-style-type: none"> We will not blame and criticise or make judgments or assumptions. We will not take people for granted or forget to say 'thank you'
Trust and integrity		
Listen	<ul style="list-style-type: none"> We will take time to listen to and consider other people's views 	<ul style="list-style-type: none"> We will not ignore other people's views or ideas or be dismissive of other's opinions
Clear communication	<ul style="list-style-type: none"> We will communicate honestly and openly, offer clear explanations, keep people informed and updated 	<ul style="list-style-type: none"> We will not have unclear communication, a lack of transparency or give misleading or contradicting information
Teamwork	<ul style="list-style-type: none"> We will involve others, work as a team, share information and follow up 	<ul style="list-style-type: none"> We will not make decisions in isolation and fail to communicate with other teams / services
Speak up	<ul style="list-style-type: none"> We will seek and give feedback, encourage and support people who speak up 	<ul style="list-style-type: none"> We will not make people feel afraid to speak up and constructively challenge or reject feedback
Personal responsibility		
Positive	<ul style="list-style-type: none"> We will be enthusiastic, positive, pro-active and have a 'can do' approach 	<ul style="list-style-type: none"> We will not be negative, moan, complain, and we will not 'sit back'
Professional	<ul style="list-style-type: none"> We will be professional, consistent, a role model and lead by example 	<ul style="list-style-type: none"> We will not be unprofessional, inconsistent or lack pride in our work
Excel	<ul style="list-style-type: none"> We will take ownership and responsibility for providing a safe and excellent service 	<ul style="list-style-type: none"> We will not pass the buck, say 'it's not my problem' and fail to deliver on our promises
Keep improving	<ul style="list-style-type: none"> We will be committed to learning and improving and developing ourselves and others 	<ul style="list-style-type: none"> We will not put up barriers to new ways of learning and doing things

Where are you right now?

Preparing for my values-based appraisal

Before the meeting

We all need to feel that we are listened to, understood and valued in our roles to achieve our maximum potential. Whether you are a key contributor, someone who needs support to be able to reach your potential or someone exceeding expectations who is ready for a change, Values Based Appraisal is about considering everyone as an individual and the development that is right for them. We want you to feel rewarded and able to do a good job within the NHS. The following preparation is best practice and will enable both you and your manager to get the most out of your conversation.

- 1) Complete the self-assessment tool and print out the results page. Your self-assessment will help you get an idea of where you are now. Consider what it tells you and what you would like to change. (*Further details can be found on Page 7 of this document*)
- 2) Seek feedback from a range of people you work with about how they see you and how what you do and say impacts them. People you might ask could include your team, patients, or other people you have contact with in work. (*Further details can be found on Page 9 of this document*). This feedback can also be used for your clinical revalidation.
- 3) Read through these guidelines and think about examples of your work that you can discuss. It might be a good idea to write these down.
- 4) Find and bring any other documentation that may be useful; previous objectives, KSF outline, job description and person specification. Ask your manager if you haven't got copies.

Sitting down with your manager and using your self-assessment and the feedback you have gathered to focus your conversation is an important step in a continuing journey to discover and maximise your potential. It's worth taking the time to prepare for the conversation so that you come away with a clear sense of direction and your manager is able to give you the right support over time.



Employee Self-Assessment Tool

This is a simple tool that will allow you to consider the questions that might be discussed during your Appraisal. If you are not able to access or complete this electronically, contact LED@wales.nhs.uk who can arrange support for you.

You should consider each statement in the self-assessment in relation to how you feel and how you are currently acting in work. Answer as honestly and objectively as possible – consider how you really feel and act now rather than how you would like to.

The self-assessment explores how you are feeling against eight areas;

- Desire or ambition
- Current performance.
- Readiness to develop
- Skills into practice
- Teamwork.
- Relationship building.
- Drive to change.
- Self-belief

Cardiff and Vale UHB Employee Self-Assessment Tool

You should consider each statement in the self-assessment in relation to how you feel and how you are currently acting in work. Answer as honestly and objectively as possible – consider how you really feel and act now rather than how you would like to.

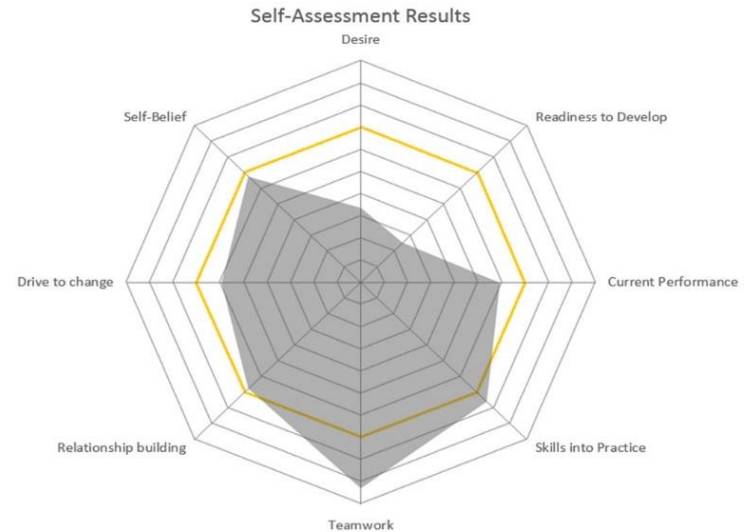
	Self-Assessment
1) Desire	
I have an ambition to develop myself in work	Sometimes True
I want to progress my career by taking on new challenges	Rarely True
I feel like I have more to offer	Rarely True
2) Current Performance	
I show enthusiasm and motivation in work	Sometimes True
I fulfil all the objectives and demands of my current role	Mostly True
I offer suggestions and ideas for workplace improvements	Sometimes True
3) Readiness to Develop	
I am currently able to fit new challenges into my work and life	Never True
I feel like the time is right to take a step into a new future	Rarely True
My current role isn't fulfilling me any longer	Sometimes True
4) Skills into Practice	
I have all the skills necessary to fulfil my current role	Always True
I have a desire to learn and develop my knowledge and skills	Sometimes True
I often support others by offering advice or guidance	Mostly True
5) Teamwork	
I always involve others, share information and follow up	Mostly True
I always demonstrate the organisational values when working towards my objectives	Always True
I am helpful and attentive to the needs of others and respect people's time	Always True
6) Relationship building	
I am able to develop effective relationships with peers, team members and other people in the organisation	Sometimes True
I value the individuality of everyone and always treat people equally and fairly	Always True
I am able to put others at ease, be patient, calm, and reassuring	Sometimes True
7) Drive to change	
I am enthusiastic, positive, pro-active, and have a can do approach to my work	Sometimes True
I am a role model and lead by example	Rarely True
I make time to listen to people's suggestions and give them credit for ideas	Always True
8) Self-Belief	
I am open to feedback, and encourage others to speak up	Mostly True
I always stand up for what is right, even when it is difficult	Mostly True
I show a good understanding of risk taking and take calculated risks through measured judgement	Sometimes True
<div style="border: 1px solid black; display: inline-block; padding: 5px 10px; color: white; background-color: #007bff;">See my results</div>	

Employee Self-Assessment Tool (continued)

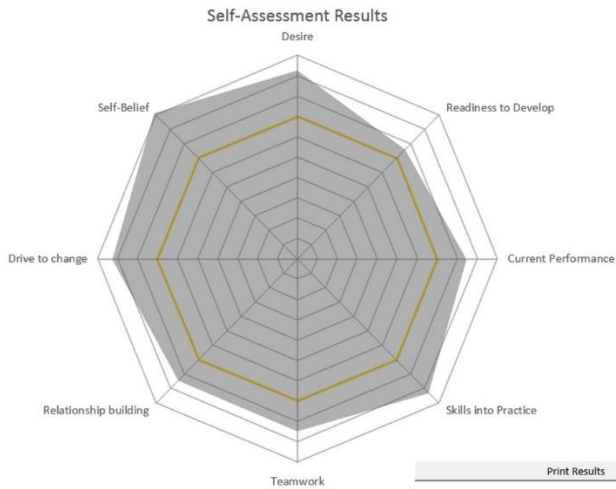
This self-assessment can be used at any time but the results should be the starting point for your conversation with your manager during your Values Based Appraisal (Appraisal). You should print out the results page and take it with you to your appraisal. You may also want to use it to ask for feedback from your team or other people.

There are no right or wrong scores, this is just a starting point for a conversation with your manager about how they can support you to get to where you want and need to be.

If you are particularly low in one or more area you will want to discuss this. You may be new to the role or post, comfortable about not making a change, not quite getting the support you need, or it may be that the role isn't quite right for you.



for



Scoring above the yellow line in all areas could show that you need to discuss where you go next and how to get there, whether that's to excel further in your current field or move on to a new chapter.

In either case, you and your manager will talk about what you can do together to make your role work better for you.

Getting Feedback from others

Getting feedback isn't always easy but it is worthwhile. Clearly, the thought of requesting feedback on your work can be scary. After all, constructive criticism can be hard to accept, especially when you've done your best. Just remember, good feedback is what will help you improve your performance and enhance your skills.

- **Ask colleagues**

Asking colleagues for feedback means you get a wider picture of yourself – not just what your manager sees. Asking each person for constructive criticism on specific things will allow you to form a good overview of your behaviours and performance. Be brave and don't just ask those who you know will say nice things. Compare your self-assessment with their comments.

- **Ask straight away**

It's good to speak to people about your work while it's still fresh in their minds, not just when your appraisal is due. That way, they'll be in a better position to remember what you're talking about without having to go back and review it again. The easier you make it for them to help you, the more useful the feedback will be.

- **Consider what's been said**

Think about the feedback you've received and ask yourself if there is any truth in it. Even if you were amazing, you will want to think about how you can repeat that. While it's great to receive positive feedback, you're more likely to learn from feedback that shows you where you can improve. Concentrate on the message, not the way it's being said or who's saying it. Some people have a more tactful way of expressing themselves than others, but they're not the only ones with useful feedback. Always thank the person and say you'll take his or her feedback under consideration.

- **Take what you need to your appraisal**

The more feedback you get, the more useful it will be. Start with one or two people and get more as you gain confidence. Your manager will be eager to hear about how you've used your feedback to improve through the year. Even if it's negative, they are there to support you and help you discover how to improve. Ask them for help during the discussion.

Career Conversation Framework

This is a great chance to share with your manager your thoughts about the difference you're making now, what you do best, what's holding you back, where you want to be and what can help you get there.

As you talk about where you are now, the self-assessment results, your feedback from colleagues and examples you write down will help to evidence this support that conversation. You will be using the Career Conversation Framework to bring that information together. There are no right or wrong places to be, the most important thing is the quality of the conversation and the insights that you gain.

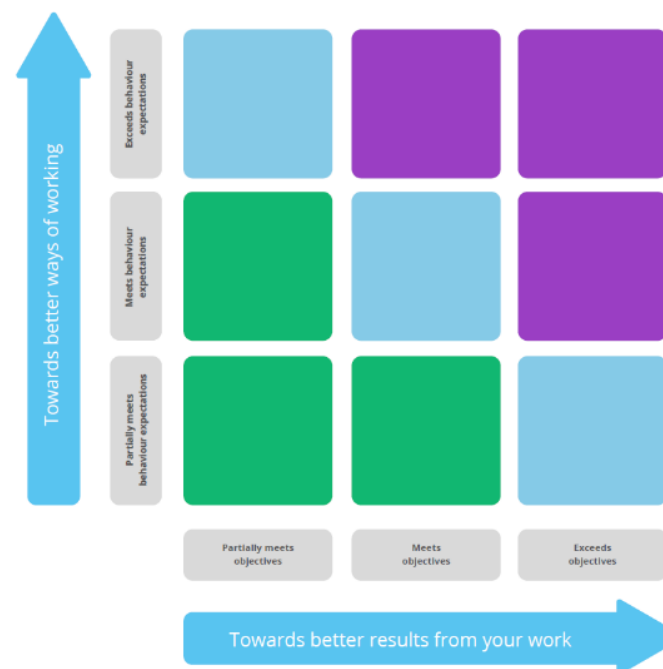
Your manager will be coming to the conversation with information they have gained from discussing expectations and performance of all staff at your level with their peers.

This framework is designed to enable a conversation about your role in the NHS and plot your position and direction. You will begin by answering the first question...

- **Where are you right now?**
- **Where do you need to be?**
- **What will it take to get there?**

During your Appraisal you and your manager will decide together where you're placed on the framework by agreeing a score on the horizontal scale for performance (towards better results) and the vertical scale for behaviour (towards better ways of working).

We all naturally move around on this framework during our careers. Many of the staff in our organisation will find themselves at the centre meeting performance outcomes using the right values and behaviours. When you start to move away from the centre, it may mean you need a new challenge or you're ready for a new stage in your career. [See Page 16 for further details.](#)



Using evidence to rate your values and behaviours / performance

You will need to use the Cardiff and Vale Values and Behaviours framework for this section (*see page 5 of this document*). Consider how you act both on a day-to-day basis and when under stress. Your feedback will have given you some information to use and your manager will help by sharing their observations. Be prepared to discuss examples of how you used the values to meet your objectives.

As part of your appraisal you will be asked to complete a number of questions. The answers you record will help you to discuss and show what you've done to your manager.

As you write and talk about where you are now, there are a number of different things that can help you evidence your values and behaviours / performance;

- Your answers to the questions below
- Feedback from others
- your self-assessment results
- Reviewing previous objectives and how you completed them
- Looking at your KSF outline, job description and person specification and checking what you do.
- Examples of projects or work you may have completed.



Using evidence to rate your values and behaviours / performance (continued)

Not all the questions will be relevant to you and your manager might want to change them or add more to make them more suitable for you. You don't have to answer everything but the more information you include, the better the discussion will be. As you answer the questions consider how you would rate yourself using *the scale on page 15* - this will help you find your position on the Career Conversation Framework.

- What do you consider to be the most important aspects of your present job?
- What do you believe you have accomplished in the past year?
- How do you feel about your performance & behaviours over the last 12 months?
- What do other people say about you, your performance, and your behaviour, what you bring?
- What motivates you and makes you feel valued at work?
- What do you find most interesting in your job?
- How do you motivate or pass your expertise on to others?
- What have you done to motivate your team / colleagues / networks?
- What do you consider your strengths to be? How do you use them in your work?
- What gets in the way of you doing a good job?
- What, in your opinion, have been the real difficulties you have had to overcome in the past year?
- What changes should be made so that you can achieve your objectives in the year ahead?
- What ambitions do you have for the future? What do you see as your next move? Or are you happy what you are doing?
- How do you feel about your development so far? Do you wish to develop further?
- What do you suggest you need to learn or have experience of in the year ahead?

Using evidence to rate your values and behaviours / performance (continued)

How to rate your values and behaviours / performance		
Rating	<i>Values and behaviours</i>	<i>Performance</i>
<i>Partially meets expectations</i>	You can show evidence that you sometimes use the values and behaviours in your work but there are times, such when you are stressed, when you sometimes behave in ways that aren't ideal. Discuss what that looks like and what support you need to develop.	You can show evidence that you've met some, but not all of the objectives, tasks or responsibilities you've been set. If you have not completed your objectives you can talk about how that happened – has the direction of your work changed or were you having difficulty?
<i>Meets expectations</i>	You can give clear evidence of how you are using the values and behaviours in your work to meet your objectives. You're able to deliver tasks using the best practice behaviours with little, if any support. You are recognised among your colleagues as someone who demonstrates the values and behaviours of the organisation.	You can give clear evidence of how you are meeting the objectives, tasks and responsibilities set for your role — for example, completing a project or providing a service. You're able to deliver tasks and meet objectives and responsibilities with little, if any supervision. You are recognised among your colleagues as a reliable person who will get things done.
<i>Exceeds Expectations</i>	You can give clear evidence of how you are modelling the organisational values and behaviours and going further, working with others, and spreading the behaviours. You only need to be given the vision or expectations of what needs to be achieved, and you do the rest. You're one of the high-impact people that others go to when they need something achieved with creative flare and added value.	You can give clear evidence of how you are not only meeting the objectives, tasks and responsibilities set for your role, but going further, achieving more and adding your own individual touch. You only need to be given the vision or expectations of what needs to be achieved, and you do the rest. You're one of the high-impact people that others go to when they need something achieved with creative flare and added value.

Finding your place on the Career Conversation Framework

Towards better ways of working

Exceeds behaviour expectations

You're a committed, hardworking team member waiting to prove what you're capable of.

You need some help to focus where your strengths lie, so that you can turn your energy into great results.

You're a committed, hardworking team member and a valuable asset for the future.

You may want a greater challenge and stretch goals to allow you to focus on your increasing performance.

You're making your mark as a high performer and role model in the work that you do.

You will need to discuss where you go next and how to get there, whether that's to excel further in your current field or move on to a new chapter.

Meets behaviour expectations

You are showing potential and working hard, but may need support to meet your objectives.

Focus on meeting your performance objectives so that your efforts match your results.

You are clearly able to demonstrate how you meet objectives and are doing a great job!

You are an expert in your role and have the potential to do more in the long term if ambition and development allows.

You're getting great results and leading in your field of expertise, bringing added value to tasks.

You are ready for exposure to a wider remit with supported growth and development. Focus on specific development gaps needed to move to the next level.

Partially meets behaviour expectations

Your job isn't working out as well as it could for you yet. You may be new to the role or post, or not quite getting the support you need. Or it may be that the role isn't quite right for you.

Let's talk about what we can do to make your role work better for you.

You are clearly able to demonstrate how you meet objectives and you are a consistent contributor to the role.

You need some support to develop the behaviours and attributes that you need in the role at this level.

You're getting good (maybe great) results, but things don't quite click with those around you. Your skills are vital for developing others.

You may need to challenge yourself to find your own comfortable place as part of our shared working culture.

Partially meets objectives

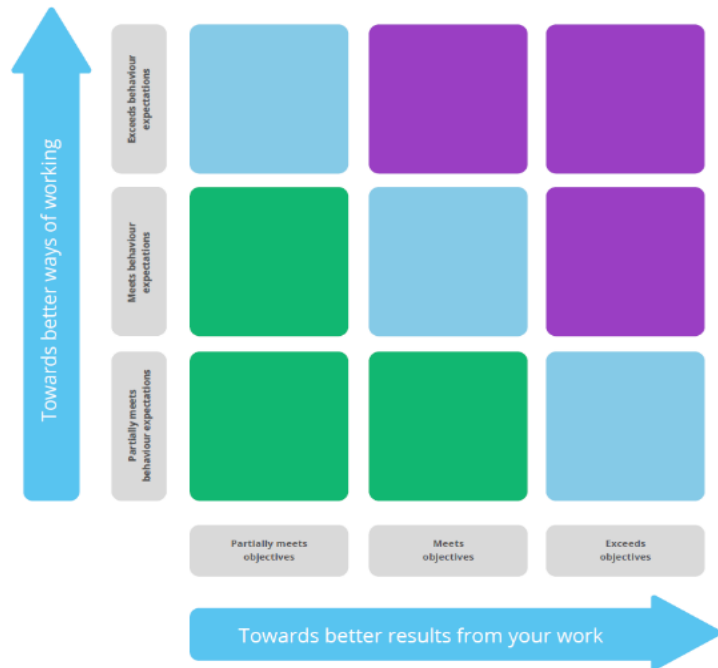
Meets objectives

Exceeds objectives

Towards better results from your work

Documenting and Following Up

Following your Appraisal, your manager will record the outcome on ESR based on your ratings for behaviours and performance and the outcome of your discussions. This information focuses on developing you, whether maintaining your development to continue doing the good job you are currently doing, addressing specific development needs identified within your current role, or tapping into potential strengths and talents to prepare you for your next role.



Purple:

Staff who fall into the purple areas should be exposed to leadership development opportunities to reach their next goal / potential. You may be offered additional projects or stretch goals to allow a greater challenge and will need to consider your specific development gaps to allow further progression.

Blue:

Staff who fall into the blue areas are doing a good job and have potential to do more. They may be clearly meeting both behaviour and performance and behaviour objectives or be focussing too much on one or the other. Either way, it's important to remember without you the NHS would not continue to deliver and remind you how to turn your energy into great results.

Green:

For staff in green areas, it's about acknowledging that you need targeted development to reach your potential in your current role, whether you are new to post and need development or you just need support to utilise your skills and reach your potential

Disagree

If you and your manager aren't able to agree about how well you have met your objectives and your place on the framework, you will want to discuss why your expectations aren't the same. What did your feedback tell you? Is your manager expecting something that you didn't know about? If you really can't reach an agreement you can ask their manager for a further review and final decision.

Where do you need to be?

Setting future objectives

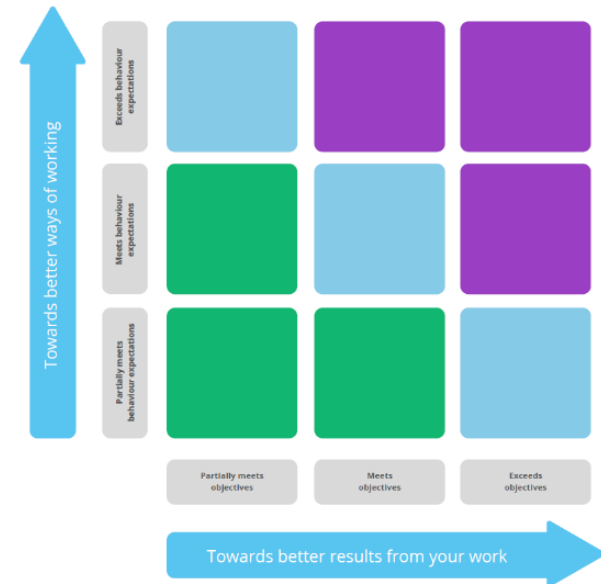
Once you have agreed where you are right now, you are now ready to plan for the next 12 months. Your objectives should clearly set out what is to be done, and how well. You should be clear how you will know if you are doing a good job.

You may need to develop your objectives completely from scratch or you may want to use previous ones as a starting point.

You will also discuss what support you need to meet those objectives and agree all of this in your development action plan (*see page 12 of this booklet*).

The framework is a map to plot your position and direction. You are now considering the second question...

- Where are you right now?
- Where do you need to be?
- What will it take to get there?



Now you will need to discuss where you want and need to be in 12 months time. Both you and your manager will need to be comfortable with your plans. Where on the grid would you like (or need) to be? When do you need to get there? How often are you and your manager going to meet to discuss your progress??

Setting future objectives at this point will make sure the expectations of both you and your manager for the coming year are clear and provide the basis for next year's appraisal.

It is important for you to understand how your personal objectives fit into your team objectives, departmental objectives and the overall organisational objectives. Your manager will have information about these if you don't.

How to set your own objectives

Your objectives should reflect, in a way you can measure, the results expected, not just the actions to be performed. This will be the same whether your work is routine or different every day. When you're writing objectives with your manager, consider how you will know if you have achieved them, and how will you know if you have done a good job?

Your objectives need to say exactly what you are expected to do and by when. Then you can consider what knowledge you need to complete them.

A good work objective has two parts: a verb, indicating what is to be done, and a standard, indicating how well.

Checklist for objectives – do you know;

- What is expected
- What it will look like if it is complete
- When it should be complete
- What the end results should be
- If you have the skills to do it well
- How you will know if you have done it well

One of the main goals of writing objectives for people is to motivate them to succeed. Objectives that include outcomes that you can't directly influence or change will have the opposite effect. Aim for objectives that will challenge you in a reasonable way.

EXAMPLE OBJECTIVES IN HERE (BECKY)

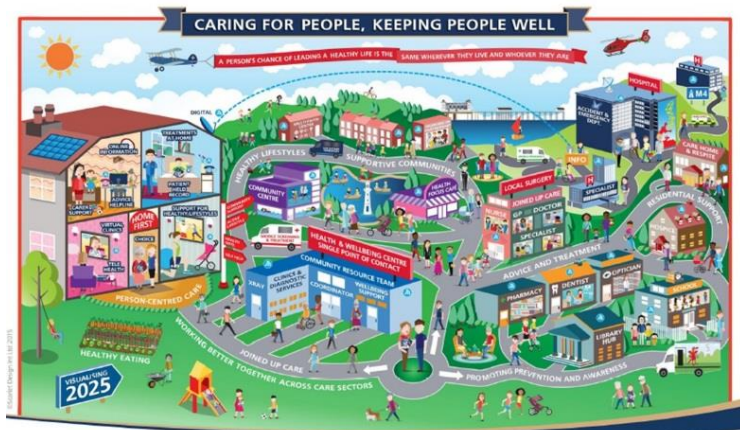


Linking your objectives to others

Every one of us contributes to the outcomes of the overall organisation. It is important you understand how your personal objectives support the organisation to reach its goals.

To help us give the best possible care and services, whatever our role, it is important that we understand what is expected of us, how our contribution helps the organisation achieve its aims and that we are rewarded for doing the right things well.

Speak to your manager about how you support them with their objectives and the team objectives / department, etc so that you can see the importance of your place in the organisation.



Cardiff and Vale University Health Board
Shaping Our Future Wellbeing Strategy
2015 - 2025



Our strategic objectives are:

For Our Population - we will:

- reduce health inequalities;
- deliver outcomes that matter to people; and
- all take responsibility for improving our health and wellbeing.

Our Service Priorities - we will:

- offer services that deliver the population health our citizens are entitled to expect.

Sustainability - we will:

- have an unplanned (emergency) care system that provides the right care, in the right place, first time;
- have a planned care system where demand and capacity are in balance; and
- reduce harm, waste and variation sustainably making best use of the resources available to us.

Culture - we will:

- be a great place to work and learn;
- work better together with partners to deliver care and support across care sectors, making best use of our people and technology; and
- excel at teaching, research, innovation and improvement and provide an environment where innovation thrives.

What will it take to get there?

Development and training

You are now at the final of the three questions;

- Where are you right now?
- Where do you need to be?
- What will it take to get there?

When you consider what it will take to allow you to meet your new objectives, you can gain support, learning and development in a number of ways;

- 70% job-related experiences
- 20% interactions with others
- 10% formal educational events

Job related Experiences

Hands-on experience is the most beneficial for staff because it enables them to discover and refine their job-related skills, make decisions, address challenges and interact with influential people such as managers and mentors within work settings. They also learn from their mistakes and receive immediate feedback on their performance. You might want to consider new projects or stretch goals to learn more in this way.

Learning from others

This includes a variety of activities such as social learning, coaching, mentoring, collaborative learning and other methods of interaction with peers. Encouragement and feedback are prime benefits of this valuable learning approach.

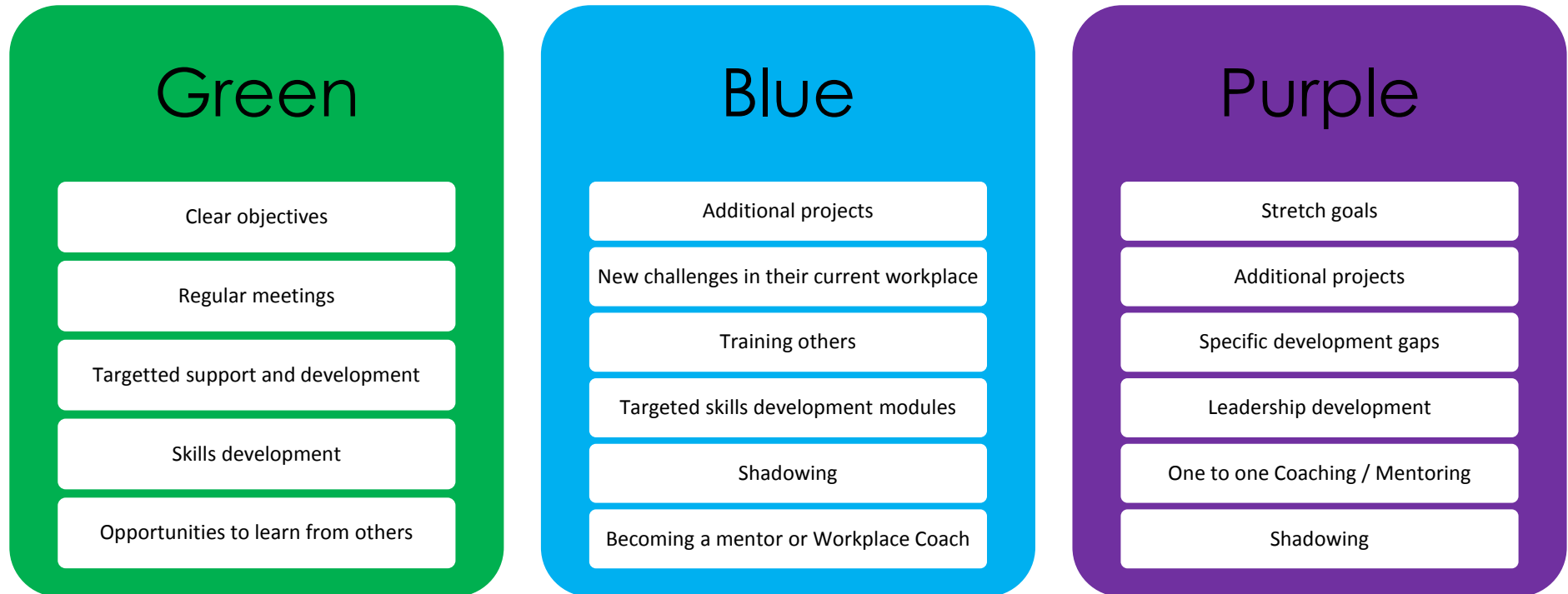
Formal Training

Skills development programmes are available. If you require access to these documents from home or do not have access to a computer please contact the LED Department for more information LED@wales.nhs.uk or Telephone: 02921 847834.

What will it take to get there?

How to complete the Development Action Plan

When you have considered what support you need to meet your objectives you can start to complete the Development Action Plan which will record the support, learning and development you need to be able to do your job well. Each development opportunity should be clearly linked with a specific objective. Your Manager will be able to direct you towards some suggestions, but you have to take personal responsibility to develop to meet both your objectives and any future plans. Your personal development will be very personal to you but some options might include;



Further information about both classroom training and other development opportunities can be found on the LED website.

Recording on ESR

There are some core pieces of information that your manager must record on ESR.

FURTHER INFORMATION TO BE INCLUDED HERE ON THE ESR PROCESS (BECKY)

- 1) Date of your Appraisal
- 2) Placement of the Career Conversation Matrix
- 3) Development Action Plan
- 4) Pay progression

The Pay Progression policy applies to all members of staff on NHS Terms and Conditions of Service must be used in conjunction with local Appraisal policies and principles. Your pay step submissions will only take place after two, three or five years depending on your pay band. Your appraisals will continue to take place annually. As part of your Appraisal documentation, you will have included on the front page the next date that you are due a pay step. If this date is within 12 weeks of your Appraisal, your manager will be able to include this discussion in your appraisal meeting.

If not, you will have to have another Pay Progression discussion closer to your Pay Step date.

Your manager **MUST** make **and** record a decision about your Pay Progression no later than 8 weeks before it is due.

To meet the requirements to receive your Pay Progression you will have to meet five specific pay progression standards:

- i. The appraisal process has been completed within the last 12 months and outcomes are in line with the organisation's standards.
- ii. There is no formal capability process in place.
- iii. There is no formal disciplinary sanction live on your record.
- iv. Statutory and/or mandatory training has been completed.
- v. For line managers only – appraisals have been completed for all your staff as required.

Flowchart: Appraisal & annual staff review process

