# Values Based Appraisal

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 currently and into the future on your career journey.

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| --- | --- | --- | --- | --- | --- | --- |
| **Date of Appraisal** | Click here to enter text. | | | | | |
| **Next Pay Progression Date** | Click here to enter text. | | **Is Pay Progression to be awarded at this time?** | Choose an item. | | |
| **Revalidation Date** (If applicable) | Click here to enter a date. | | | | | |
|  | **Name** | **Job Title** | | | **Clinical Board** | **Department** |
| **You** | Click here to enter text. | Click here to enter text. | | | Click here to enter text. | Click here to enter text. |
| **Your Manager** | Click here to enter text. | Click here to enter text. | | | Click here to enter text. | Click here to enter text. |

**Your appraisal** - will involve discussion around the following;

* Values and Behaviours – evidence your demonstration of UHB values and behaviours
* Your Performance – review of previous work based objectives
* Talent Management – your aspirations for the future and agreement of your position on the Career Conversation Framework

**Before your Appraisal** - 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. Therefore, in advance of the meeting please;

1. Complete the self-assessment\* and print out the results page to bring with you.
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.
3. Read through the Values-Based Appraisal guidelines\* and think about examples of your work that you can discuss. Record these in this document.
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.
5. Start to think about what you need to achieve in the year ahead and what support you need to reach those achievements.
6. Return this Appraisal documentation to your manager at least one week in advance of your meeting

\* documents are available on the on the Cardiff and Vale UHB Internet Site.

# Where are you now?

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| **Please think about how what you do links to the aims of Cardiff & Vale UHB, which are:**  **What We Want to Achieve**  Our mission: Caring for People, Keeping People Well  Our vision: A person’s chance of leading a healthy life is the same wherever they live and whoever they are.  **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; & * excel at teaching, research, innovation and improvement and provide an environment where innovation thrives. |

# Where are you now?

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 how you’ve used your values and behaviours to meet your objectives over the last 12 months.

The answers you record here will help you to discuss and share your progress with your manager. As you write and talk about where you are now, use any feedback you have and your self-assessment to support your responses.

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.

| Questions | Staff Responses | Managers Comments |
| --- | --- | --- |
| What do you consider are the most important aspects of your present job?  What do you believe you have accomplished in the past year? | Click here to enter text. | Click here to enter text. |
| 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? | Click here to enter text. | Click here to enter text. |
| 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? | Click here to enter text. | Click here to enter text. |
| 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? | Click here to enter text. | Click here to enter text. |
| 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? | Click here to enter text. | Click here to enter text. |
| What do you suggest you need to learn or have experience of in the year ahead? | Click here to enter text. | Click here to enter text. |
| Any other comments? | Click here to enter text. | Click here to enter text. |

# Career Conversation Framework

This framework is designed to enable a conversation about your role in the NHS. Think of it as a map you can use to plot your position and direction.

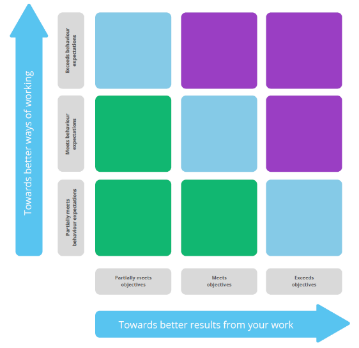
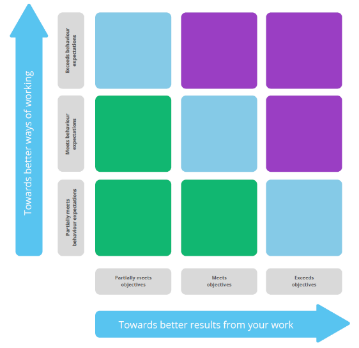
Where you’re placed on the framework is decided by the previous scores on the horizontal scale for performance (towards better results) and the vertical scale for behaviour (towards better ways of working).

The discussion is now about not just what you do (better results) but how you do it (better ways of working).

See ‘Values Based Appraisal Guide’ for the complete framework and the descriptions of the boxes.

# Finding your place on the Career Conversation Framework

“There are no right or wrong places to be – the most important thing is the quality of the conversation, in helping you understand and maximise your potential.”



Tick the area that best represents where you feel you currently sit. Your position can, and will, change over time.

Tick the area that best represents where your manager feels you currently sit. This again can, and will, change over time.

Confirm the area that you and your manager have AGREED best represents where you currently sit.

Your manager will record on ESR where you are right now based on your ratings for behaviours and performance and the outcome of your discussions. This information will be used to direct you towards appropriate support, development opportunities and succession planning.

# 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 should also discuss how that links together with the objectives of your manager, team, department and Cardiff & Vale UHB (see page 3).

You will also discuss what support you need to meet those objectives and agree this. As you complete your objectives with your manager, add any required support or training into the Development Action Plan.

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Team objective 1:** | | | | Click here to enter text. | | |
| **Individual objective:** | | | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | | | **Date for completion:** | **How will you know if you are doing well?** |
| 1.1 | | Click here to enter text. | | | Click here to enter a date. | Click here to enter text. |
| 1.2 | | Click here to enter text. | | | Click here to enter a date. | Click here to enter text. |
| 1.3 | | Click here to enter text. | | | Click here to enter a date. | Click here to enter text. |
|  | |  | | | |

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| --- | --- | --- | --- | --- |
| **Team objective 2:** | | Click here to enter text. | | |
| **Individual objective:** | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | **Date for completion:** | **How will you know if you are doing well?** |
| 2.1 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 2.2 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 2.3 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |

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| --- | --- | --- | --- | --- |
| **Team objective 3:** | | Click here to enter text. | | |
| **Individual objective:** | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | **Date for completion:** | **How will you know if you are doing well?** |
| 3.1 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 3.2 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 3.3 | Click here to enter text. | | Click here to enter a date. |  |

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| --- | --- | --- | --- | --- |
| **Team objective 4:** | | Click here to enter text. | | |
| **Individual objective:** | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | **Date for completion:** | **How will you know if you are doing well?** |
| 4.1 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 4.2 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 4.3 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |

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| **Team objective 5:** | | Click here to enter text. | | |
| **Individual objective:** | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | **Date for completion:** | **How will you know if you are doing well?** |
| 5.1 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 5.2 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 5.3 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |

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| **Team objective 6:** | | Click here to enter text. | | |
| **Individual objective:** | | Click here to enter text. | | |
| **Key tasks identified in achieving the objective:** | | | **Date for completion:** | **How will you know if you are doing well?** |
| 6.1 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 6.2 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |
| 6.3 | Click here to enter text. | | Click here to enter a date. | Click here to enter text. |

# How will you get there? - Development Action Plan

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | Individual Objective No: | Support needed or development opportunities identified | How are support / development needs going to be met? | By when: |
| 1 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| 2 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| 3 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| 4 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| 5 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |
| 6 | Click here to enter text. | Click here to enter text. | Click here to enter text. | Click here to enter a date. |

Your manager will record your Development Action Plan on ESR. This information will be used to direct you towards appropriate support, development opportunities and succession planning.

# Final comments

This is an opportunity to cover anything else you want to talk about, including your health and wellbeing at work and any relevant issues outside of work. What else could you share that would allow your manager to support you better?

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| Staff Member comments | | Manager comments | |
| Click here to enter text. | | Click here to enter text. | |
| Manager has recorded on the Electronic Staff Record (ESR): | |
| Appraisal completion date | |
| Placement on Career Conversation Framework | |
| Development Action Plan | |
| Signature Staff Member | Click here to enter text. | Signature Manager | Click here to enter text. |
| Date | Click here to enter a date. | Date | Click here to enter a date. |