**Focus on YOU**

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| Annual Review & Plan | |
| YOUR NAME: |  |
| POSITION: |  |
| SERVICE / AREA: |  |
| REVIEWER’S NAME: |  |

Please fill in all the parts relating to you and then send it back to your Manager at least 3 days before your Review & Planning session.

**The most important Question for YOU**

**WHY have this meeting at all?**

If this review goes really well for me, l will…

* (*e.g. have a better understanding of our service direction/my role/what you expect of me*)

# 

Annual Review Process

Your review document has three sections.

Some you prepare ahead and some parts you will complete together.

|  |  |
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| **Section 1**  **Review and discuss the past year**  **Section 1:**  **Review and rate the past year** | **Reflect on the past year**   1. Check and review your PD – does it reflect well the ‘what’ and the ‘why’ of your role? 2. Review your achievements this year against agreed Objectives, Project Deliverables & KPIs 3. Review professional development & progress 4. Agree on one or two areas of opportunity, for you to support and model our values |
| **Section 2**  **Plan for the year ahead** | **Set your objectives for the coming year**   1. Discuss the broad priorities for your role, how it fits into the wider SCDHB priorities and set Objectives, Project Deliverables & KPIs for the coming year 2. Set your Personal Development Plan including a discussion about career objectives and where appropriate progression planning for your role 3. Identify and discuss any issues of health and well-being / work-life balance 4. Ensure potential barriers and needed supports are discussed and planned for |
| **Section 3**  **Summarise and confirm outcomes** | **Record the commitments**   1. Complete the summary and Record of Discussion section (i.e. sign off the document) 2. Manager to return a copy to the completed form to HR for your Personal File 3. Manager to send career and development goals to SDU |

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**Page 3**

**Self and Manager Assessment of Performance against Accountabilities, Deliverables & KPIs**

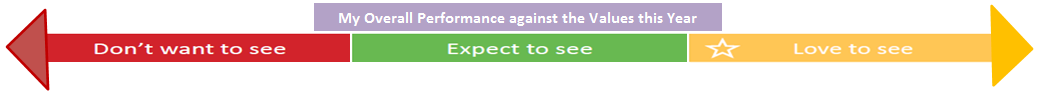
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| --- | --- | --- | --- |
| **REFLECT & REVIEW - Professional Development (including mandatory training)** | | | |
| **My Confirmation:** | **Please list:**  Privacy and Confidentiality Yes / No  Fire Training Yes / No  Moving & Manual Handling Yes / No  **Other (list any development/training during the review period)** | **My Managers’ confirmation that all training completed as required:** | **Please circle one:**  Yes / No |
| **My Comments on how I have generated improvements and shared learning following professional development activities:** | | **My Manager’s Observations:** | |

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| **REFLECT & REVIEW – Key Accountabilities (from your PD)** | | |
| **KEY ACCOUNTABILITIES** | **KPIs (for discussion)** | **EVIDENCE /NOTES for joint discussion by EXCEPTION (areas of particular concern or focus)** |
| **e.g. Strategic Leadership** | * Relevant, effective service plans in place * Policies & practices reflect best practice * Enhanced integration of service delivery |  |
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| **My Comments on areas of particular concern, focus or achievement:** | | **My Manager’s Comments on areas of concern, focus or achievement:** |

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| **REVIEW & REFLCT – Specific Objectives & Project Deliverables for the Previous Year** | | |
| **OBJECTIVE/DELIVERABLE** | **Measures** | **EVIDENCE /NOTES for joint discussion by EXCEPTION (areas of particular concern or focus)** |
| **e.g. Efficiency Project 1** |  |  |
| **e.g. Efficiency Project 2** |  |  |
| **e.g. Service Improvement Project 1** |  |  |
| **My Comments:** | | **My Manager’s Comments:** |

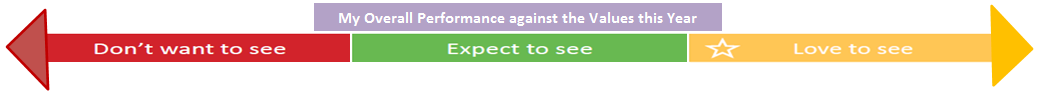
**Values in Action – A Framework to indicate HOW you may improve performance**

Move the **X** on each line to show where **you see yourself.** Your Manager will move the **O** to showwhere **they see you**



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| **Speak up**  for others | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Speak up for Others** | | |
|  | | |
| * ‘Walks by’ or ignores poor or unsafe care or behaviour | * Speaks up every time they see poor or unsafe care or behaviour | * Encourages colleagues to speak on behalf of others |
| Demonstrate **Compassion** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Demonstrate Compassion** | | |
|  | | |
| * ‘Is dismissive of other peoples’ concerns, feelings or pain * Stands back until someone asks for help – “not my patient / job” * Walks past people in obvious need | * Checks in to see people are OK * Notices pain, and does everything they can to reduce it | * Is thoughtful about other people and takes time to ‘put themselves in other peoples’ shoes’ * Always wants to make a difference for other people, even if it means putting themselves out |
| Foster  **Trust** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Foster Trust** | | |
|  | | |
| * Has hidden agendas and works in silos * Track record of failing to follow through on promises | * Transparent, open and honest * Clearly works for the common good and puts patients first | * Facilitates trusted professional relationships between staff, services and organisations |

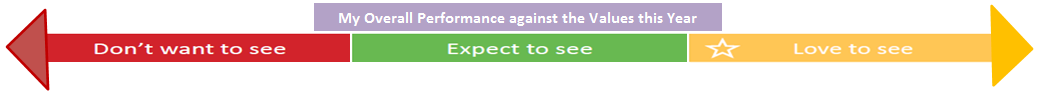
Integrity



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| **Communicate**  effectively | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Communicate Effectively** | | |
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| * Keeps information that other people need to themselves * Demonstrates dismissive behaviours and language when others express ideas | * Keeps people informed so they know what is happening * Is prepared, reads notes in advance * Explains clearly, using appropriate language, so people can understand | * Connects teams and services, inside and outside our organisation, so they can work better together * Is willing to negotiate and embraces challenges to their ideas |
| Promote involvement &  **Teamwork** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Promote Involvement** & **Teamwork** | | |
|  | | |
| * Silo-working. Acts without involving people in issues that affect them * Let’s hierarchy get in the way of care | * Involves patients, families and colleagues in everything they do | * Involves people to make informed choices about things that affect them |

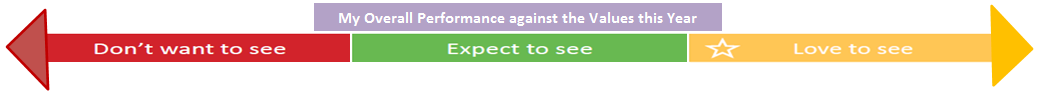
Collaborate

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Accountability

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| Give and  receive **Feedback** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Give and Receive Feedback** | | |
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| * Is not open to hearing or acting on feedback themselves * Blames other people | * Appreciates good work, says ”thanks” * Speaks up when people don’t live up to our values or give their best | * Encourages feedback from their service users |
| **Safe**  practice | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Safe Practice** | | |
|  | | |
| * Covers up errors * Doesn’t follow agreed safe practice | * Follows safe practice, is vigilant about risks, and challenges unsafe practice | * Embraces and shares evidence based practice * Shares lessons learned * Supports others to improve safely |
| Take  **responsibility** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Take Responsibility** | | |
|  | | |
| * Covers up errors * Doesn’t follow agreed safe practice * Fails to meet agreed objectives, project milestones and KPIs | * Adheres to legislations, protocols standards and procedures * Reliably meets KPIs and owns up to mistakes and learns from them * Is punctual, committed and fully focussed | * Inspires accountability and self-responsibility in their team and others * Champions change and improvement |



Respect

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| --- | --- | --- | --- |
| **Value**  each individual | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Value each Individual** | | |
|  | | |
| * Ignores or avoids patients or colleagues * Is aggressive, rude or impolite * Takes credit for the efforts of others * Talks over people, doesn’t let them express views | * Is courteous and polite, engages people, makes eye contact, smiles * Is interested in what others say * Values people’s time | * Makes everyone feel positively welcomed and valued |
| **Respect**  diversity | Make your mark on this line to show your progress in supporting our shared values and behaviours for - **Respect Diversity** | | |
|  | | |
| * Makes assumptions, is judgemental or disrespectful of other people * Gossips | * Remembers peoples’ names * Welcomes different views / cultures * Clearly demonstrates cultural competence | * Brings the best out in others by recognising their different abilities * Seen as a champion for diversity and culture |
| Protect  **dignity** | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Protect Dignity** | | |
|  | | |
| * Does / says things that make people feel unsafe, undervalued or bullied * Takes their stress out on others via tone, language or behaviour | * Always acts if they see someone’s dignity or privacy being harmed * Is aware of the impact of things they say and do on other people | * Encourages everyone to support the privacy and dignity of patients, families and colleagues |

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| **Positive**  we can make a difference | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Positive we can make a Difference** | | |
|  | | |
| * Uses negative, pessimistic language * Accepts poor performance | * Uses best practice to deliver their best outcomes, whatever their role * Celebrates and shares success | * Is positive about what we can achieve * Has high standards, and motivates others to meet them |
| **Improve**  services and ourselves | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Improve Services and Ourselves** | | |
|  | | |
| * Resists change for the better * Doesn’t look to learn or improve their own skills or knowledge | * Reviews performance and evidence to look for better ways to do things * Proactively finds ways to improve their own knowledge and skills | * Inspires others to be creative in finding better ways to do things * Supports other people to learn, develop & progress |
| **Best**  Value | Make your mark on this line to show your progress in supporting our shared values and behaviours for – **Best Value** | | |
|  | | |
| * Self-serving behaviours * Demonstrates lack of awareness of the experience of patients and others * Wastes resources | * Ensures resources within their control are used responsibly and wisely * Doesn’t tolerate waste and participates in improvement activities | * Actively drives improvement towards delivering the right care at the right time and in the most appropriate setting by the right people |
| **My Comments on one or two things I want to focus on to model and support our values:**   * . | | **My Manager’s Comments and Examples or one or two areas to focus on to model and support our values:** | |

Excellence



**Plan for the Year Ahead**

**Performance Objectives – next 12 months**

* Objectives should be measurable
* Objectives should be linked to your PD and/or service plan
* Every objective should be aligned with one of SCDHB’s Strategic Goals.
* **Review KPIs against your Key Accountabilities** and set just a few meaningful objectives below (2-5).

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| **Strategic Goal** | **Objective and Outcomes** | **Measure** |
| Productive Partnerships |  |  |
| Fit for Future |  |  |
| Health Equality for All |  |  |
| Valuing our People |  |  |
| Integrated Person Centred Care |  |  |

**Career Development Plan**

This is the part of the conversation where you talk about aspirations and future goals and look at joint actions towards achieving them.Your Manager will discuss the option of involving others in these discussions and sharing your identified development goals with the SDU depending on your goals.

| **Goals**  For work next year | **Career Development Goals**  What competency / skills area are you focusing on? | **Development Required**  Detail what actions you will take to achieve your required level of skill / knowledge (On the job, observation and feedback, attending a course, further tertiary study, etc…) | **Resources**  Who has a part to play? What resources are needed? | **By When** |
| --- | --- | --- | --- | --- |
| **Development**  **Priority 1** |  |  |  | June 2018 |
| **Development**  **Priority 2** |  |  |  | June 2018 |



**Where do YOU want to be?**

**Final Thoughts**

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**3**

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| **Your final thoughts on your performance and development over the past year** |
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| **Your Manager’s final thoughts on your performance and development over the past year** |
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**Final Signoff on Completion of the Process**

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| --- | --- | --- |
|  | **Signature** | **Date** |
| **Employee** |  |  |
| **Reviewer** |  |  |

**Signed copies to be given to:** The Employee, their Manager and HR for your personal file

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