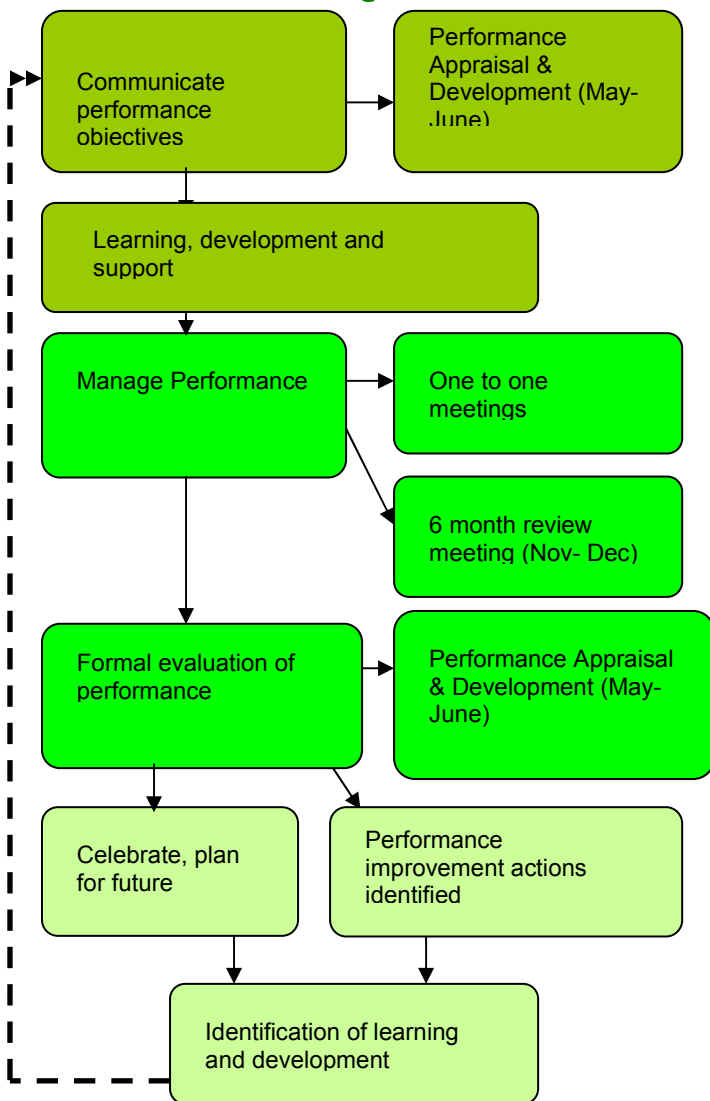


## 1. Introduction to Performance Management

Performance management provides a framework for reviewing and managing an employee's performance in work. Discussion about work and work progress is an important part of the performance management process. The Performance Appraisal and Development meeting is one method for doing this.

## 2. Performance Management Flowchart



## 3. Performance Appraisal and Development Meeting

1. Introduction
  - Set the scene
2. Looking Back
  - Review last year's objectives and agree ratings
  - Recognise and celebrate success
  - Personal development achieved
3. Where you are now
  - Discuss changes, challenges and issues
4. Looking Forward
  - Agree this year's objectives
  - Agree personal development
5. Summarise
  - Check details and understanding
  - Plan next steps, including six month review meeting

The Performance Appraisal and Development documentation will be kept on the employee's personal file and will be kept confidential in line with normal line management arrangements.

## 4. What you will need

- The Corporate Plan
- Departmental and team Plan/objectives
- Wirral Values and Behaviours
- Job description and person specification
- Performance Appraisal form
- Last year's appraisal
- Learning and Development opportunities

## 5. Objectives

1. Objectives should be cascaded from the Departmental Plan. All objectives should be **SMART**:

**S**pecific  
**M**easurable  
**A**chievable  
**R**elevant  
**T**ime bound

2. Objectives should have:

Beginning (active verb)	Middle (what is to be achieved)	End (a measure)
Reduce	the number of follow up callbacks from 1 <sup>st</sup> time telephone enquiries	by 3% this year
Increase	the take up of training through promotion of activity	by 5% each quarter, this year
Produce	a processing system that is user-friendly, sustainable and improves processing	by 150 applications per quarter, this year

## 6. Wirral Values

*“underpin everything we do – what we do and how we do it”*

There are 7 Values:

**P – People first**  
**E – Efficient and effective**  
**R – Responsive to change**  
**F – Flexible**  
**O – Open, honest and transparent**  
**R – Respectful of others**  
**M – Maximise potential**

## 7. Scoring Performance

The following scoring criteria will be used to score performance against each objective:

Score	Description
N/A	<b>Not Applicable</b> – unable to achieve due to other factors
1	<b>Not Achieving</b> – has not achieved the required objective
2	<b>Developing</b> – has partially achieved the required objective
3	<b>Achieving</b> – has achieved the required objective
4	<b>Exceeding</b> – has achieved and exceeded the required objective

## 8. Setting the Standard

**At a good performance appraisal and development meeting:**

- The employee should do most of the talking.
- The manager listens actively to what is said.
- Performance is analysed and appraised, not personality.
- The whole period is reviewed, not just recent or isolated events.
- The manager gives and receives feedback.
- The employee listens to and reflects on feedback.
- Achievement is recognised and celebrated.
- Plans covering future development and objectives are agreed.
- There should be no surprises.

**At a bad performance appraisal and development meeting:**

- The manager controls the meeting.
- The Focus is on failures and omissions.
- The manager does not clearly identify how a score of 3 and 4 can be achieved.
- The meeting ends in disagreement between the manager and the employee.

## 9. Manager's Checklist

To do:	<input checked="" type="checkbox"/>
Agree suitable date and venue, giving sufficient notice to the employee	
Ensure the employee knows where to find the performance appraisal and development form and guidance	
Ensure the employee knows the purpose of the performance appraisal and development	
Prepare for the meeting using the performance appraisal and development form	
Ensure the employee has prepared for the meeting	
Gather information and make notes under each section of the form to help the discussion	
Get feedback from colleagues, internal/external customers, using 360 degree feedback tool (Managers only)	
At the meeting, consider and discuss the employee's future potential and personal development	
Arrange a 6 month review date	
Check dates of 1-2-1 meetings	

## 10. Employee's Checklist

To do:	<input checked="" type="checkbox"/>
Prepare for the meeting using the performance appraisal and development form	
Gather information and make notes under each section of the form to help the discussion	
Check previous performance appraisal and development to review progress against last year's objectives	
Think about Wirral's Values and Behaviours and how they affect performance	
At the meeting, consider your future potential and personal development – what support will you need?	

For further information contact a member of the Organisational Development Team at [www.organisationaldevelopmentteam@wirral.gov.uk](mailto:www.organisationaldevelopmentteam@wirral.gov.uk)



PERFORM  
for Wirral

Quick Guide  
to  
Performance Appraisal and  
Development