

Goal Setting and Quarterly Reviews

1) Will the goal setting and coaching meetings be different if I'm on probation?

If you are new to Buckinghamshire Council then you will be set probationary goals. You will still meet regularly with your manager and there is a formal signing off process for probationary goals.

2) What happens if I'm new to a team or role?

If you are new to a role your manager your manager will want to know more about what you have done in your previous role as it relates to your new role. It is likely that your new goals will focus on getting up to speed in your new role.

3) Does anything need to be recorded on SAP about goal setting?

There is no formal goal setting stage on SAP although it is advisable to keep a record between yourself and your manager about your agreed goals so that you are both clear about expectations and these can be referred to at the mid and end of year reviews. At review time you may choose to upload the agreed goals to your SAP record for reference.

4) What if I don't agree with my goals?

It is not the intention for every aspect or detail of your role to be captured in your short term goals. It is about being clear about your immediate and most important priorities over the coming period and that your goals are reasonable and fair in comparison to your colleagues. Goals should be set with the expectation that you will be able to achieve the majority of your set goals within the next period. If you think that is unrealistic or unfair then you need to discuss this with your manager and if necessary refer to your grandparent manager.

5) Do my goals have to be different each quarter?

No. There are many operational roles where the performance standards are clearly laid out and these are not likely to vary from quarter to quarter. However we recommend that you review these each quarter to ensure that they are still reasonable and achievable in the circumstances and to review progress, difficulties, challenges and any personal development goals.

In addition Managers may ask:

6) What does a good goal look like?

A common tool for setting objectives or goals is the SMART acronym. This is still a good way of testing the quality of goals or objectives but sometimes makes the process of defining goals overly complicated. We have shorted this popular tool into 3 steps - good goal needs to be relevant, realistic and in reach. It needs to be relevant to the priorities of the team plan, realistic in terms of the role and the context and in reach (deliverable) during the review period. The ultimate test of a good goal is do you and your team member have a clear shared view of what needs to be done by when.

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7) Do you have any examples we can look at?

We do not hold any central record of goals. Goals should support and flow from team plans and goals so the best way of testing out whether a goal is fair and reasonable is to shape the goal with the team or individual and then check and compare with one of your own manager colleagues or your own manager whether that is fair and consistent with what others in the wider team are being asked to do.

8) How many goals should I set?

Ideally you should aim to set 3 or 4 key goals for the person to focus on. Remember this does not cover everything that this person needs to do in this role. These are just their top priorities for this next period which will help the team to deliver their wider goals and plans.

Performance Review Meetings

1) Do I need to collect and upload evidence on to SAP?

We expect you to take an active part in your review. This means that you will need to do some advance preparation before your review meeting and be prepared to discuss on how well you think you have achieved your goals and how you have shown the values. You may want to refer to examples of your achievement and behaviours on which to base your discussion. You don't have to upload this to SAP. There will be a written summary of the review after the meeting and this must be uploaded to SAP. Your manager may also ask you to add or attach some of your notes or achievements in support of your review.

2) What rating should I expect if I'm new to the Council?

The probation period for new starters is 6 months. IF you have not yet successfully completed the probation period at the time of your review then you should expect to receive a Needs Development rating.

3) What happens if I change roles shortly before my review?

It's a good idea whenever you change roles to have a final review meeting with your current manager before you move on. You and your new manager can then review that information as it relates to your new post when they set your new goals. The weighting of your performance achievements in your previous role on your current review will depend on the timing over the changeover and whether or not the new role is a promotion or at the same grade.

4) What happens if I've been promoted or temporarily promoted?

Your review will be against the standards and targets of your new post, so if you have been very recently promoted it is likely that you will be rated as needs development in the new role if you were promoted within the 6 months preceding the review.

5) What happens if I am absent at review time?

You and you manager should plan your reviews around any expected absences that are due to occur whether that be holidays or upcoming longer absences e.g. due to expected stay in hospital or maternity /paternity leave. If you have been absent for an extended period of planned (or unexpected) time in the previous review period then the manager will refer the last performance discussion before your absence to determine your performance review rating.

6) What happens if my manager is absent at review time?

Arrangements should be made for your grandparent manager or another manager to complete your review. Check with your grandparent manager who this has been assigned to.

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7) How likely is it that I will get a rating higher than Achieving?

Most people will get the Achieving rating because most people are doing a great job. A small proportion of colleagues can be awarded a higher rating if something unusual or unexpected has happened that sets their achievements apart from others, because they went far beyond the expectations that were set, or consistently achieved against all the odds in very difficult or challenging circumstances .

In addition Managers may ask:

8) Must the employee achieve all of their goals to get achieving?

The performance rating is your judgement call on how well that person has achieved their goals in the context of the performance triangle. There is a broad range of outcomes that fit into the achieving rating. For example, If the employee has achieved the majority of their goals and one thing is slightly behind for good reason then they are likely to be achieving . Alternatively if the majority of goals have been met and one or even two goals are exceeding then they will still be achieving.

If you think that there has been a serious shortfall, e.g. in quality or timeliness or behaviours ,that you have already been discussing during your coaching conversations it is likely that you will give a Needs Development rating. Please refer to our Rating guidance sheet for more help in reaching a rating.

9) How important are behaviours in reaching a rating?

Behaviour is just as important as achieving goals. If a team member is not living up to our values then could impede the progress of other colleagues to meet their objectives, it could undermine the standards we expect and could impact on our reputation as a team or council. Conversely where colleagues are identified by peers and colleagues outside of their areas as role models this can have an extremely positive impact on the collective behaviours of teams and service delivery.

10) I think my employee deserves a higher than achieves rating – what should I do?

Whilst the majority of colleagues will get the achieving rating there will be some colleagues whose performance will warrant an exceeding or outstanding rating. If you think that someone is performing at this level in your team make sure that you discuss this with your management colleagues before awarding this rating to ensure that you are being fair and consistent with the ratings of managers across the wider team - as it can be extremely demotivating for your team member (and yourself) to have to downgrade this rating if you do not have the support of your management team.

11) How do I upload the performance review to SAP?

Once you have completed your review discussions and made your notes you need to record the performance rating on SAP. Refer to our C4P SAP guide that explains the SAP screens and input actions. The employee has the final action to complete the record so don't leave

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all of the SAP actions to the last minute!

12) What are the deadlines for completing the mid and end of year reviews on SAP?

The Mid Year deadline for SAP Performance records to be completed is 30th September. The End of year deadline is 31 March.

These deadlines ensure that we can produce corporate oversight reports to ensure that everyone has a rating and that ratings are fair and consistent and provisional end of year ratings can be confirmed as final.

13) What impact does the Rating have on the annual Pay review?

This is determined by Terms and conditions set for the employee. If the employee is on AVDC, C&SB, or WDC terms and conditions there is no impact on the pay review unless performance is rated as Needs Development or Unsatisfactory in which case a scale increment can be withheld.

For employees on BCC Terms and Conditions pay progression is dependent on the employee's position in the pay scale (ie. above, below or equal to the competent point) and their final End of year rating. (See [You and Work](#) for more information)

For employees on Buckinghamshire Council Terms and Conditions, pay progression is dependent on the employees position in the pay scale (pay point 1, 2, or 3) and the final End of year rating. Please see the [Buckinghamshire Council Pay and Reward Framework](#) for more information.