



Coaching for Performance

Mid Year Appraising Performance Webinar

August 2020





Coaching for
Performance

Appraising Performance

Introduction

- C4P is the new performance framework for Buckinghamshire Council and is built on continuous coaching conversations:



- informal 121s, check ins or catch ups
- Quarterly reviews and goal setting meetings
- Appraising Performance meetings in September and March



- This webinar will focus on the Mid Year **Appraising Performance** meeting
- We also have a pre recorded webinar cover the quarterly review and goal setting conversations and a new webinar covering SAP recording actions.
- You can find more information about C4P on ‘You and Work’ and ‘The Source’

Recap

- Throughout the year you will have held regular conversations to talk about the job and how its been going. These will happen as often as is necessary (Informal 121s)
- You will have set quarterly goals based on relevant priorities and work plans, and you will have been reviewing progress against these in your quarterly reviews
- In September and March you will need to hold the next quarterly review and **Appraisal Review** to rate performance over the previous 6 months

Recap on Quarterly Reviews

During the year you will have been setting and reviewing goals and capturing **how work has been going**. Here's what you would have discussed and captured



- What has gone well throughout the year to date?
- What have you delivered?
 - Is this what was agreed as part the goal setting conversation?
 - If not, why not?
- Have there been any changes in circumstances throughout the year?
- What could have been even better if ...?
- How have your behaviours tied into our employee values..?
- Have there been any issues or concerns (including health and wellbeing) that we have needed to address?



Performance Appraisal – Mid Year Review (September)



- The mid year review is an appraisal meeting as well a goal setting meeting
- It is a more formal meeting and an **indicative performance rating for the year to date** will be shared with the employee
- Its also a good opportunity to discuss strengths, development needs, and aspirations as part of a personal development plan
- A record of review meeting and the rating given needs to be recorded on SAP after the meetings
- Ratings may change at year end depending on future performance and development
- All ratings will be reviewed by your Corporate Director and CMT



Performance Rating Considerations

The appraisal review takes in the whole job and context

Goals and behaviours (quarterly review)

Has the person met their goals?

What are their work outputs like? - the standards, the quality and the turnaround

Have they shown the right behaviours? (PACT values)

How are they doing in the **Rest of their role**:

Has everything else been covered to a good standard?- has anything been left that shouldn't have been or are there any worry areas.

Current circumstances :

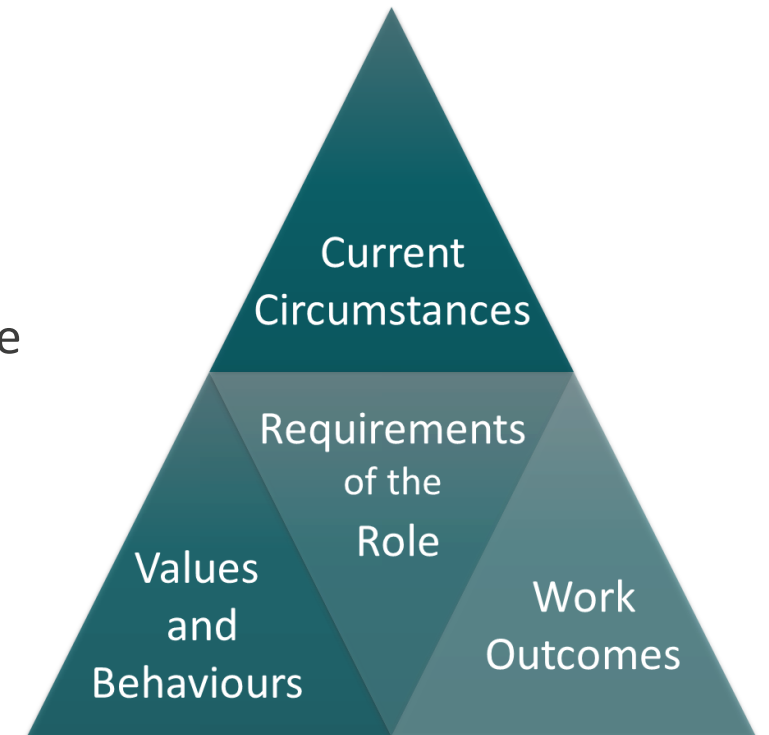
Were there particular circumstances that made the work unusually demanding or the performance more exceptional?

How were the role requirements delivered and what was exceeding or outstanding about this performance ?

How does what this person delivered (goals, behaviours, outcomes) differ from other people in the same role responding to the same circumstances?

The rating needs take into account all of the above

Fulfilling the role, meeting the goals , and showing the values is what achieving looks like.



Needs Development



Achieves

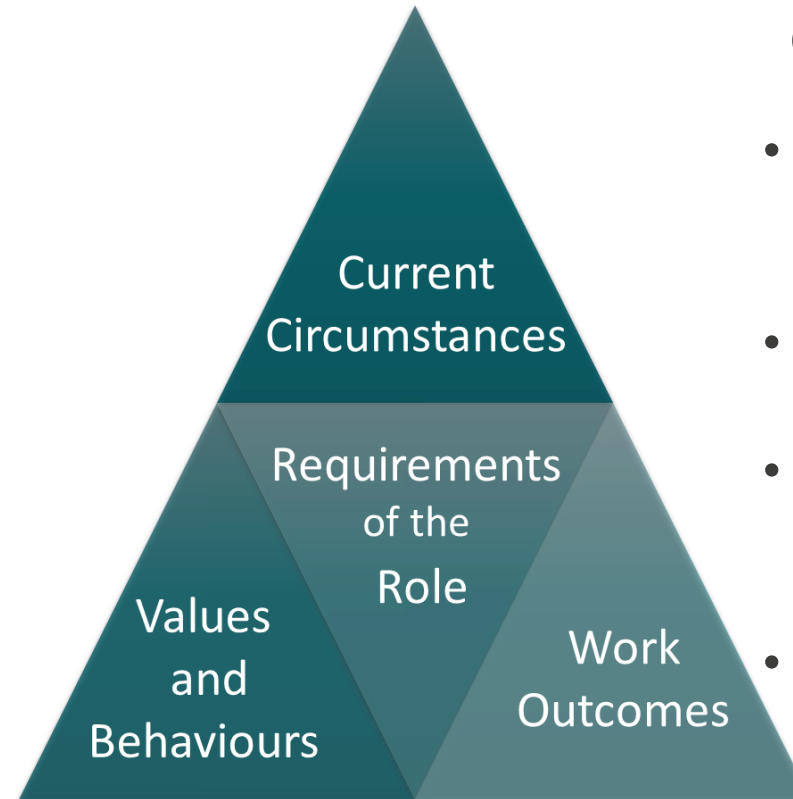


Exceeds

Done everything that was expected

Could include

- New in role
- Not yet performing whole job/ developing in role
- Behind on goals
- Falling short of minimum standards
- Examples of poor behaviour



Could include

- Surpassed goals and expectations whilst still performing whole role requirements
- Delivered against the odds and/or in extremely challenging context
- Exceeded goals and requirements in a way that quantifiably impacted beyond the team
- Recognised as ground breaking or exceptional role model

Performance Rating Scale

Most people will be doing a good job and will get achieves




Documenting the Review

1. Complete the **Quarterly review template**

This covers a review of the last quarter and the revised goals going forward

2. Complete the **Appraising Performance Template** :

- What has been achieved in the previous 6 months
- How behaviours have shown the values
- How the rating was reached (summary of performance)
- Future learning and development/career aspirations
- The rating given

Appraising Performance Template		
Performance review	Comments – employer/manager	Rating
What goals have been achieved in the year to date? <ul style="list-style-type: none"> • Have you reached the required standard and met timescales? • Are these the things that would be normally expected of you in your role or has anything has been exceptional? • Is there anything that has not been delivered or completed? If so, why? 		
Do you work in a way that matches our PACT values?		
Overall summary of performance Include thoughts on learning and development and future aspirations		

Performance rating				
Unsatisfactory	Needs development	Achieves	Exceeds	Outstanding

3. Upload the Appraising Performance Document onto SAP

4. Employee confirmation on SAP

COMPLETE ALL ACTIONS BY END OF SEPTEMBER

Recording the Rating on SAP

We have recorded a separate webinar on uploading to SAP which runs through all of the screens.

If you are familiar with the screens there are 4 basic actions

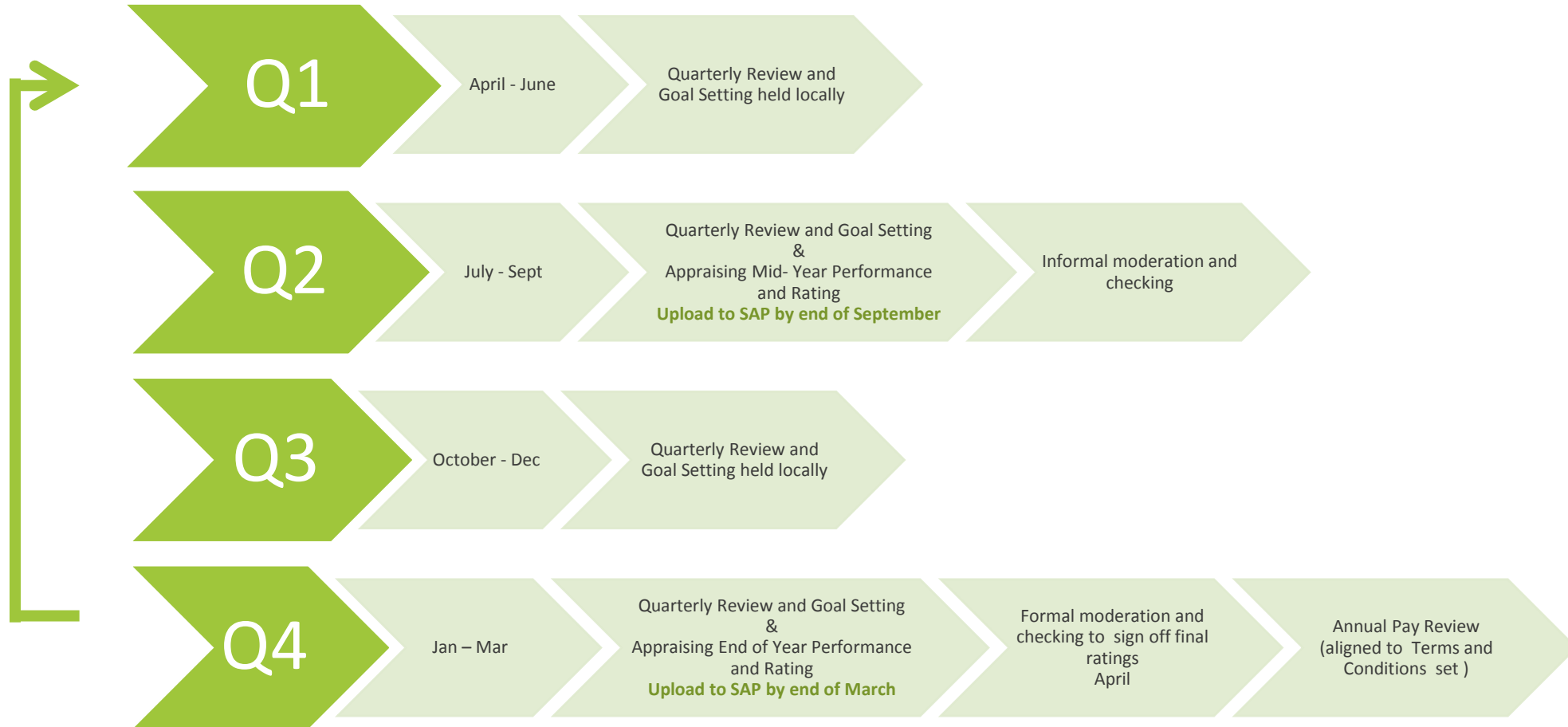
1. Attach the Performance review document to the employee SAP Performance Review Record
2. Enter the Performance Rating on the assessment tab
3. Save and submit the record to the employee
4. The employee must check the details and confirm the record - on SAP - to complete the process.

Once completed this part of the assessment record becomes closed.
Complete by end of Sept.

Summary

- Prepare for the mid year review conversations by thinking about the quarterly reviews and conversations you have held throughout the year
- Think about the Performance Triangle and the full range of factors that will impact on the overall performance rating
- Be clear that achieving is a great outcome and means the individual is fully meeting all aspects of the role
- New employees may still be developing in the role and that is to be expected. Talk about this as part of employee induction and manage expectations accordingly
- Speak to HR about anyone who may need support if they not achieving in role
- Talk to your manager if you are unsure about your rating decision
- Adjourn and reschedule if you need to take some extra information into account from the meeting
- Look at learning and development opportunities for all staff and talk about these throughout the year not just at appraisal time
- Upload mid year ratings onto the employee record on SAP by end of September

TIMELINE AND SAP ACTIONS



Questions?