

**PERFORMANCE MANAGEMENT SYSTEM
RECORD OF DISCUSSION**

In Preparation:

Review of performance of (Appraisee):

Year:

Date of appraisal meeting:

Appraiser:

Date October review:

Objectives for the year (copied from previous record of discussion form):

Personal Objectives	Measures of Success	Date Achieved

Objectives

In Preparation:

Look back at the year's objectives. What went well during the year and why? Was there any training or other development that you undertook that specifically helped you to achieve any of these objectives?

What might have gone better? Are there any factors that inhibited you from achieving any objectives? How could these be avoided in the future?

Read the current Job Description. Are there any areas which are outdated or inaccurate? Consider proposed changes which could more accurately reflect the role.

In addition, at the discussion meeting:

Were any additional areas identified where things went particularly well during the year including any training or other development undertaken that specifically helped to achieve any of these objectives? Any additional areas identified that did not go so well or inhibitors to these? Any lessons learnt.

Our Principles and Values

In preparation:

Consider the principles laid out in the Strategic Plan and [Code of Conduct](#) and the behaviours laid out in the guidance document which support our overall approach that WE VALUE PEOPLE. Are there any situations in the last year where you felt that you were able to demonstrate examples of putting these into practice? What has given you most satisfaction over the year? Can you relate this to your demonstrating these principles or behaviours, or others demonstrating them towards you? Is there anything you have learnt over the year about how you might consider handling a situation differently in the future? Do you need any help in doing this?

In discussion:

Note a brief summary of discussions about any situations in the last year where these principles or exemplary behaviours were demonstrated. Also note any areas in which improvement is being sought, including any support that may be required, *in addition to any already noted above*.

Your relationship with your manager

In preparation:

In the last year, are there any areas where you have been particularly well supported by your manager? Are there any areas where not? Is there anything that your manager should start, stop or continue to do in order to better support your work? (See Appendix 1 in the guidance document for further suggestions about what might usefully be included here)

In discussion:

Note a brief summary of discussions about your relationship. List any actions that have been agreed, in addition to, or differently than set out above, about things that need to happen, stop happening or continue to happen, to ensure that the appraisee is fully supported.

Next Year's Objectives

In preparation:

Based on the Business Plan and Action plan (if appropriate) what would you consider to be suitable objectives for you to achieve in the coming year? Consider what the objective should be, what the measures of success would be and when it could be achieved by? (If completing for a probation period, were there any areas in the recruitment assessment process or from the job description where some support in undertaking this part of the job, or the opportunity to develop experience would be beneficial?)

During the discussion:

What objectives have been agreed?

Personal Objectives	Measures of Success	Date to be achieved by

Long Term Career Plans

In preparation:

Are there any areas of work within the organisation or related to the organisation that you would be interested in learning more about or progressing into? Do you have any other Long Term Career Plans where support from your manager would be beneficial?

In discussion:

Note any actions agreed, or additional information discussed at the meeting.

Training and Development Requirements

In preparation:

What training and / or development do you think would benefit you? This could be specifically to address a shortfall in skill, knowledge or experience required to undertake an objective, or something that may assist in longer term career development. Don't forget that not all development comes in the form of a formal training course – it could also include things such as internet research, job shadowing, visiting another relevant organisation, on-line training, work experience, discussions, coaching, mentoring etc. Don't forget to consider why the training or development would be useful, what you consider you would be able to do differently as a result, and how this would benefit the organisation. (If completing for a probation period, were there any areas in the recruitment assessment process which identified areas where training or development could be beneficial?)

In discussion:

What training and development has been agreed?

Requirement	Why needed (what objective will it support?)	Outcome (what will happen differently as a result?)	Timescales (when does this need to take place)

Appraiser:

Comments:

Signed: Appraiser: Date:

Appraisee:

Comments:

Signed: Appraisee: Date:

Interim Review

Date of interim review:

Objectives

Have any objectives been amended?

Personal Objectives	Measures of Success	Date to be achieved by	Reason for any adjustment

Training and Development

Have any training or personal development requirements been amended?

Requirement	Why needed (what objective will it support?) and reason for adjustment?	Outcome (what will happen differently as a result?)	Timescales (when does this need to take place)?

Signed: Appraisee: Date:

Signed: Appraiser: Date: