

**Enhanced Performance and Development Review POST MEETING FORM**

To be completed after the Performance and Development Review discussion. Please refer to ‘PDR Manager Guidance’ for completion of all sections.

This form is format to allow any sections to be expanded.

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| **Name:** | |  | |
| **Job title:** | |  | |
| **Department/Team:** | |  | |
| **MVDC start date:**  **Current role start date:** | |  | |
| **Manager’s name:** | |  | |
| **Date of meeting:** | |  | |
| **Looking Back:**  **How has this employee demonstrated he/she has been effective in their role over the past 12 months? Have objectives for the past 12 months been met? Was their approach in keeping with MVDC values?** All roles must be assessed against both objectives and values. Any discussion on behaviours or values may be based on opinion rather than fact, therefore reasons for holding the view you express will need to be explained. | | | |
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| **Looking Forward:**  **What are the major expectations and objectives for the coming 12 month period?**  **How will they best be achieved?**  Objectives that are goal orientated should be specific, challenging, realistic and achievable. Where appropriate, broad timescales for completion should also be assessed, and progress measured.  Some objectives are more complex than task related. If this is the case, you should ensure realistic expectations are discussed and that there is a mutual understanding of what ‘good’ looks like as well as a discussion of likely potential challenges that may prevent an ideal or optimum outcomes.  Identify behavioural and technical skills that are most relevant to demonstrate ‘success’ and how the individual may draw on skills already developed to assist in achieving objectives. Discuss how these align to the Council’s Values other key strategy documents such as the Corporate Plan and/or your Service Plans. Remember to include discussion as to how effective management will be demonstrated. Refer to BMT ‘Core Skills’ as appropriate to frame your discussion. Remember this is not a comprehensive tick list, but a toolkit to allow a focus on one or two areas where relevant. | | | |
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| **Wellbeing:**  Are there any areas of change and/or concerns (whether in the workplace or connected to the employee’s home life) that the employee wishes to discuss? E.g. This may be changes in family circumstances or life changes such as children leaving home, elder or child care, retirement.  This area gives you both an opportunity to identify any support that can be provided. The Employee Assistance Programme, Benefits information or Occupational Health service etc. may be useful tools to support any employee wellbeing issues.  You can discuss future plans, as well as any agreed actions to enhance wellbeing, particularly where this has the potential for a noticeable impact on performance. | | | |
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| **Aspirations & 9-Box Grid discussion:**  Use this section to outline your 9-Box Grid outcome and the rationale behind any decision reached. Remember that the grid is designed to support a rounded conversation about the employee’s performance as well as potential for progression. This may be progression within the employee’s current area of expertise, an alternative or broader area of technical expertise or management development.  Outline the employee’s aspirations and desire for development and/or progress in order to determine the most suitable support to consider. A number of factors such as wellbeing, historic development opportunities, other feedback (360, partners, councillors, colleagues for cross-cutting work/forums etc.) and evidenced performance may be considered.  If the employee desires to progress beyond their current role remember to discuss how they can demonstrate they are ready either now or in the future, with reference to BMT Core Skills as appropriate. If new to their role, or in performance related discussions, ensure that there are separate meetings taking place to support (probation, capability or more frequent 1:1s). | | | |
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| **Development summary:** [**Please see here for Guide to Viewing/Printing Learning Events**](http://molly.mole-valley.gov.uk/index.cfm?articleid=51543)  Use this section to record learning and support that has been identified as beneficial to the employee’s current role including any organisational and service specific mandatory training requirements.  Your 9-Box Grid discussion will support and inform the direction, breadth and level of support, development and training for each individual. The [Learning and Development section of My HR](http://molly.mole-valley.gov.uk/index.cfm?articleid=14202) will support managers to identify learning and development opportunities available to all employees.  Please note any learning or development that you believe is needed and has an attached cost must be documented below for learning needs analysis and consideration by the relevant BMT or Executive Head/SLT for approval before booking.  Current budgetary challenges due to Covid pandemic are such that expenditure is unlikely to be agreed unless it is required to deliver current role.  If LEAP (Learn, Engage, Apply, Perform) is applicable you should also outline a rationale for recommending inclusion. Full information about LEAP is available in the Learning & Development Policy. In addition to the rationale for consideration outline the type of development being requested, and views on why this is thought to be the most appropriate approach. Employees identified for LEAP will be considered by the Executive Head of Service and SLT as a whole. | | | |
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| **Area of learning/ development** | **Delivery method identified –**  **apprenticeship/ Surrey learn course/ external course etc. (mentor/coaching & e-learning where notable)** | | **Course detail including and preferred dates/time frame for attendance** |
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| **Employee identified for LEAP –** If applicable (i.e. if identified as a Progressive Performer), outline rationale for inclusion, type of development requested and views on why this is thought to be most appropriate. | | | |
| **Overall assessment of performance:**  Provide a conclusion (based on your conversation) on the individual’s performance with reference to objectives and behaviours. You should include key points of context where these have had a bearing on the assessment of performance.  Your conclusion should also include a summary of the individual’s identified development needs and suitability for career progression as assessed against the 9 Box Grid. If your conclusion is that the employee is high performing and is likely to look to progress beyond their current role in the next 12 months, this should be discussed with SLT in a collective meeting that follows the annual resource planning meeting. Reflections of the role (Job Description and Person Specification) to ensure appropriate objectives are set against the current role should also be included.  The form should be kept by the manager and employee and will be used for reference in the separate annual resource planning meeting (to consider team wide people performance) with each Executive Head.  PDR completion and a copy of the completed PDR form must be [recorded on i-Trent](http://molly.mole-valley.gov.uk/index.cfm?articleid=51543). Any areas highlighted in yellow should not be included in the attached copy (see reference to Privacy Notice overleaf).  PDR completion is actively monitored and audited as part of our reassurance through the Annual Governance Statement. Business Managers need to pool all PDR information ready for a discussion on [workforce and succession planning](http://molly.mole-valley.gov.uk/index.cfm?articleid=50478) with their Executive Heads end May/June before service plans are drafted for the following year. | | | |
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| **Manager’s signature**  **Date:** | | | |
| **Employee’s signature:**  **Date:** | | | |

You are deemed to consent to providing any additional information to your manager (e.g. on personal circumstances, wellbeing or background information provided in relation to your performance) that is included within this form. However, if you are concerned that any such information is particularly sensitive or personal to you (and does not fall within our stated grounds for sharing information as contained within our Employer’s Privacy Notice) you should highlight the information that you are not providing consent to share with anyone but your manager. Please note that information relating to performance in your role does not need consent to be processed in accordance with GDPR principles and insofar as it relates to management of your employment contract with us. (See Employment Privacy Notice for further details).