Southern Health NHS
NHS Foundation Trust

SH HR 60

Appraisal Policy

Version: 3

Summary:	This document provides managers and staff with guidance on the how to effectively carry out and participate in the Appraisal process, to ultimately enable staff to be successful in their role and contribute to the delivery of a high quality, efficient, effective and safe service.	
Keywords (minimum of 5): *(To assist policy search engine)*	Appraisal, individual objectives, team objectives, strategic objectives, business plan, performance review, continuing professional development, behavioural competency framework, professional/clinical competence.	
Target Audience:	All Southern Health NHS Foundation staff with the exception of medical staff – see 2.2.	
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Version Control

Change Record

Date	Author	Version	Page	Reason for Change
Feb 2014	R Hawkshaw	2	8 9 10, 11 13	Section 6.4. – clarity provided on when annual appraisals are expected to be conducted (i.e. between April-June) Section 6.5 – link to 'incremental pay progression'. Section 7.1.3. – clarity on when appraisal objectives should be set for new starters. Section 7.6.1. & 9.1 – generic wording provided on recording as this has changed this year (this will then be reviewed). Appendix 1: Summary flowchart – amended to reflect the above amendments.
May 2015	L Jones	3	4 6 6 7 8	2.3 - reference to professional validation process 4.3.1 – reflects the requirement for staff to record their appraisal 4.4.1 – updated job title 5.1 – reference to professional validation process 6.4 – extended timeframe month 4 (July) be used for finalisation.

Reviewers/Contributors

Name	Position	Version Reviewed & Date
Human Resources Team, Staff Side, Joint Consultative and Negotiating Committee, and Leadership, Education and Development		Version 1, May – July 2013.
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Appraisal Policy

1. Introduction

1.1. Southern Health NHS Foundation Trust (the 'Trust') is committed to providing a high quality, efficient, effective and safe service. The success of the Trust depends on the abilities and performance of its staff, not just as individuals but also on the way in which they interact, work together and support each other.

1.2. It is recognised that where regular ongoing effective appraisal and development of staff are in place, high quality services are achieved and service users' health and social care outcomes, experience and safety are positively affected.

1.3. The principles of the Appraisal Policy are to ensure that all staff, both appraisees and appraisers, are aware of the expectations of the Trust and the appraisal process.

Making clear the link between individual and organisational objectives can improve work effort by up to 28 per cent, and giving fair and accurate feedback by up to 39 per cent (Roebuck 2011, quoted in The Kings Fund Report "The Future of Leadership and Management in the NHS").

1.4. A good appraisal process will ensure that all staff feel valued and confident in their contribution to the Trust, are given feedback on their performance and can work in a way that is consistent with the Trust values and fulfils the demands of their work environment.

1.5. A robust appraisal process is integral to the achievement of our strategic objectives and moving towards the culture we aspire to in Southern Health by supporting the:

- Trust and Divisional Strategy and Business Plans;
- Trust and Divisional strategic objectives and principles around redesigning services, integrating services and growing our business
- Provision of high quality, safe services which improve the health, wellbeing and independence of the people we serve'; and
- Enhancement of job satisfaction and engagement through assisting staff in performing in their role to the best of their ability.

2. Scope

2.1. Appraisal is a mandatory Trust requirement for all staff. This Policy applies to staff working at all levels within Southern Health NHS Foundation Trust (with the exception of medical staff – see 2.2).

2.2. Appraisal for medical staff is to be carried out in accordance with the Appraisal and Revalidation for Doctors Policy.

2.3 For Nurses and AHPs the Trust appraisal process will support professional revalidation requirements. The revalidation appraisal form supports preparation for revalidation. This will allow discussion regarding evidence and reflection. This is available to download from the Appraisal intranet pages and must be used in addition to normal appraisal paperwork.

3. Terminology

3.1. Appraisal

Appraisal involves a twelve (12) monthly cycle of performance review and personal development which culminates in a 1-to-1 structured appraisal discussion. This cycle also incorporates a six (6) month review and any other local arrangements appropriate for individuals i.e. monthly 1-to-1 or informal meetings to discuss progress on objectives.

Therefore the process of appraisal begins on appointment as the staff member undertakes their Induction (both Organisational and Local) then continues throughout their employment with the Trust.

The overall objective of an effective appraisal process should be to help staff to maximise their job performance for the joint benefit of the individual and service users/the Trust.

3.2. Appraisee

Staff undertaking their appraisal and being appraised.

3.3. Appraiser

Normally the Line Manager (or it may be a supervisor or designated deputy) who is responsible for conducting a member of staff's appraisal.

4. Roles and responsibilities

4.1. Trust

4.1.1. The Trust has overall responsibility to:

- Ensure an effective appraisal process is in place;
- Staff are aware of this Policy and adhere to its requirements; and
- Monitor appraisals through Workforce Planning systems, with performance reports to be sent to the Senior Human Resources Management Team, Executive Team, Board and the Executive Review Panel.

4.2. Appraisers

4.2.1. It is an appraiser's specific responsibility to:

- Appropriately plan, agree and record realistic, measurable objectives for each team member
- Ensure each team member has an annual appraisal meeting, using the appropriate competency framework/Appraisal Form. This should be supplemented by regular reviews, at least every six (6) months, to agree relevant and realistic objectives for achievement, agree the support required for the individual to undertake their role and to discuss the individual's progress within their role.
- Ensure all relevant documentation is completed
- Monitor each team member's performance, giving and being open to receive honest and constructive feedback.

4.2.2. In addition, appraisers must ensure:

- They are familiar with this Policy and any related policies and procedures (see Section 11).

- They are adequately trained to be able to undertake effective appraisal meetings (see Section 8.1).
- Copies of relevant documentation, such as previous appraisal plans, and job descriptions are available for staff.
- They allow sufficient, protected time to conduct appraisal meetings.
- They give consideration to whether additional support is needed by them to successfully conduct the appraisal processes.
- They give the appraisal process the time, attention and importance it requires to be a key part of the Trust's performance management processes.
- They ensure their team understand the significance of actively contributing to this process.

4.3. Staff

4.3.1. It is the member of staff's responsibility to:

- Take an active part in appraisal process
- Allow planning time for the appraisal process, ensuring objectives agreed are achievable, measurable and relevant to their role
- Complete all relevant documentation and record their appraisal
- Engage in two-way discussions on progress in an honest and constructive manner.
- Provide honest and constructive feedback to their line manager about how they have been most helpful and/or what could be improved to help enable the staff member in their role.

4.3.2. In addition, staff must ensure that:-

- They are familiar with this Policy and any related policies and procedures (see Section 11);
- They have adequate knowledge and skills of the process to be able to effectively participate in appraisal meetings;
- They ensure they have copies of relevant documentation, such as previous appraisal plans and job descriptions.
- They meet with their appraiser at least every six (6) months to agree relevant and realistic objectives for achievement, agree the support required to undertake their role and to discuss their progress within their role.
- They allow sufficient, protected time to participate in appraisals meetings.
- They share with their appraiser any concerns they have about undertaking the appraisal process and give consideration to whether additional support is needed to successfully participate in the appraisal processes.
- They partake in any development activities identified and agreed with their appraiser.
- They give the appraisal process the time, attention and importance it requires to be a key part of the Trust's performance management processes.

4.4. Human Resources and Leadership, Education and Development (LEaD) team

4.4.1. The Director of People and Communications has delegated responsibility from the Board to ensure this Policy is properly implemented and monitored.

4.4.2. The Human Resources team and the LEaD team have a responsibility to ensure that this Policy is followed, fairly and consistently. Their duties will involve:

- ensuring the effective implementation and embedding of this Policy through education and monitoring activity;

- providing advice and support in the application of this Policy; and
- ensuring that the Policy is maintained and updated accordingly in line with any organisational changes or legislative changes.

4.5. Trade Unions

4.5.1. Trade Union representatives have an important role to play generally in providing advice, support and working in partnership with managers and the Human Resources team in looking to ensure that the Appraisal Policy is implemented.

5. Policy purpose

5.1. The aim of the Appraisal Policy is to ensure that the Trust achieves a number of positive outcomes, which support the Trust and its vision. These include:

- Ensuring all staff are integrated into an ongoing appraisal process upon joining the Trust.

- Through properly implemented individual appraisal, the quality of service delivered to our service users can be monitored and continually improved.

- Through the appraisal process:-

  - Enabling staff to understand '*what they need to do'* – that is, to understand the Business Plans, objectives of the team/Trust and how the individual contributes to these;

  - Enabling staff to understand and review progress on *'how they need to do things'* - that is, to review performance and progress against the relevant behavioural competency framework which supports the Trust values.

  - Facilitating collaborative working by honest and constructive feedback, and two-way discussions between individuals and their managers/appraisers on the assessment, review and continual improvement of an individual's performance; and

  - Facilitating the identification of personal development and training needs which support an individual to achieve their objectives and realise their potential.

  - Supporting the process of professional revalidation.

5.2. In summary, appraisals aim to ensure greater mutual understanding between staff, more opportunities to recognise staff contributions, better clarity of focus on the business plans/objectives and increased staff engagement.

6. General principles

6.1. All appraisal meetings are based on the premise of 'no surprises' – there is an expectation that dialogue and conversations will be ongoing throughout the year, supporting the appraisee in their awareness of their strengths, areas for development and progress on achieving their objectives (see Section 7.6.2).

6.2. The appraisal meeting is not the forum for disciplinary or grievance issues; the overall process may recognise issues regarding performance, but these should first be addressed

through supervision and the appropriate Trust policy (e.g. Managing Performance (Capability) Policy and Procedure).

6.3. Where significant changes to the job description have been agreed by the post-holder and the manager, advice should be sought from a Human Resources Advisor for its potential impact on the job evaluation of the post (see the Job Evaluation Policy).

6.4. The annual appraisal cycle starts from 1st April, therefore it is expected that the majority of annual appraisal meetings are conducted between April and June. Month 4 (July) should be used for finalisation. This may include paperwork sign off, compliance recording and completion of any appraisals that where postponed due to unforeseen circumstances.

6.5. Incremental pay progression and appraisals

In accordance with the NHS 'Agenda for Change' Terms and Conditions handbook (amendments on 31 March 2013) and the Trust's Incremental Pay Progression Policy:-

- Incremental pay progression for all pay points, within each pay band, will be conditional upon individuals demonstrating that they have the requisite knowledge and skills/competencies for their role and that they have demonstrated the required level of performance and delivery during the appraisal review period.

- Provided the appropriate level of performance and delivery has been achieved during the appraisal review period, individuals will progress from pay point to pay point on an annual basis. For pay bands 1 to 7, 8A and 8B this will apply to all the pay points in each pay Band. For pay bands 8C, 8D and 9 this will apply for the first 4 pay points in the band.

- **Annually earned increments - pay bands 8C, 8D and 9:** pay progression beyond the first four pay points in pay bands 8C, 8D and 9 will be dependent upon the achievement of locally determined levels of performance as set out in appraisal objectives. Staff will progress through the last two pay points in these pay bands only when they are assessed as having met the required level of performance.

For further information, see the Trust's Incremental Pay Progression Policy.

7. Appraisal process

A summary of the appraisal process is provided in Appendix 1.

7.1. Arranging an appraisal

7.1.1. All staff will participate in an annual appraisal meeting with their immediate manager, supervisor or designated deputy (the 'appraiser'), supplemented by regular reviews, at a minimum of six (6) monthly intervals.

7.1.2. A mutually convenient date should be agreed for the appraisal meeting, at least three (3) weeks in advance of the meeting. Sufficient protected time must be allocated for the meeting (no less than one (1) hour and no more than three (3) hours as a guideline).

7.1.3. For new starters, the appraiser and appraisee should agree appraisal objectives no later than three (3) months after the new appraisee's start date.

7.2. Preparing for an appraisal

7.2.1. The appraisee should be given clear prior guidance by the appraiser on the outline structure and content of the meeting to allow for preparation (also see 'Team Brief on Appraisals' on the 'Appraisals' webpage on the staff intranet).

7.2.2 A 'Quick Checklist' is also available on the 'Appraisals' webpage on the staff intranet to help appraisees and appraisers to prepare for an appraisal.

7.3. Prior to the appraisal meeting:-

7.3.1. **The appraisee and appraiser should:**

- Obtain the appropriate Appraisal Form/Paperwork for the appraisee's role (available from the Appraisal Paperwork webpage on the staff intranet or from the appraiser if appraisees do not have easy access to the website).
- Both the appraisee and the appraiser should separately:-
- Review the job description, previous appraisals (or similar) documentation prior to the meeting so that appropriate objectives can be discussed at the meeting.
- Prepare and complete the relevant sections of the Appraisal Form.
- Review and understand the Divisional, Area and Team Business Plans and objectives to inform objective setting (appraiser only)

7.4. The appraisal meeting

7.4.1. The appraisal meeting, using the appropriate Appraisal Form as a basis for discussions, should:-

- Be a two-way process, designed to ensure that appraisees and appraisers are able to discuss progress in a positive and constructive manner
- Enable a review of the appraisee's past performance, objectives and development.
- Enable an appraisee's objectives to be aligned with the Business Plans and team objectives. In addition, the objectives set should be SMARTER (Specific, Measurable. Agreed, Realistic, Timed, Evaluated and Reviewed).
- Enable the identification of the appropriate learning and personal development activities to help achieve objectives and potential. Specifically, the appraisee/appraiser should consider a wide range of development options that take into account the type of development required and preferred learning style. (For further information, please contact the LEaD team and refer to the 'Education and Development Policy).

Any learning and development activity undertaken should be evaluated to ensure it achieved the learning and development need. Part of this process should be to agree how the key learning should be shared within the team, directorate and if necessary within the organisation.

7.4.2. The Appraisal Form should be used to record the outcomes of the meeting and then agreed by the appraiser and appraisee. If the documentation is not completed during the

appraisal meeting, it should be written by the appraisee and submitted to both parties within two (2) weeks of the meeting for agreement.

Once signed by both parties, one copy should be kept by the appraiser and one by the appraisee. **This documentation is confidential and should be kept in a secure place.**

7.5. The appraisee can seek recourse to their appraiser's manager in the event of any dispute over the content of their appraisal. All efforts will be made to resolve any issues arising (also see Section 8.3) before any complaint is raised through the Trust's Grievance Policy and Procedure.

7.6. After the annual appraisal meeting

7.6.1 **Recording a completed appraisal**
Recording that an appraisal has been completed is a core part of the appraisal process.

The method for recording appraisals will be communicated Trust-wide, prior to 1st April (the start of the Trust's annual appraisal cycle). This should be cascaded and discussed with teams to ensure all staff are aware of their responsibilities on how completed appraisals will be recorded.

Using this information, Divisional Performance Review reports will be run monthly to provide evidence to the Divisional Directors, Senior Human Resources Team, Executive Team, Board that appraisals are being carried out.

7.6.2 **Monitoring and review of staff performance, development and objectives**

7.6.2.1 The annual appraisal meeting with the immediate manager, supervisor or designated deputy (the 'appraiser'), should be supplemented by regular reviews, at a minimum of six (6) monthly intervals.

7.6.2.2 Support and progress on performance, development and objectives should also be discussed and reviewed at informal meetings and regular 1-to-1 meetings.

8. Appraisal training and resources

8.1. Appraisal training for appraisers – is provided by the Trust and should be attended by the following members of staff:-

- Managers who are new to the appraisal process
- Staff with the responsibility for appraising others

8.2. Appraisal training for appraisees – is provided by appraisers/managers or accessed directly by the appraisee.

Briefing presentations and FAQ's are available for appraisees at www.southernhealth.nhs.uk/workday/appraisals/

8.3. The Trust's online appraisal resources
All appraisal paperwork, support, guidance, team briefings and quick checklists for preparing for an appraisal are available on the Appraisal webpages on the staff intranet**:** www.southernhealth.nhs.uk/workday/appraisals/

8.4. **The Employee Assistance Programme (EAP), Workplace Options** - is a useful support mechanism for managers and staff for appraisals as well as a resource to support resolution. Contact details: Freephone (24 hours a day, 7 days a week) 0800 243458; or Email assistance@workplaceoptions.com.

8.5. **'Objectives, achievements and learning at work' booklet** – available at Organisational Induction for new starters or downloadable from www.southernhealth.nhs.uk/workday/appraisals/. To help with appraisal discussions, this small booklet has been designed to help staff keep track of their progress towards their objectives, record achievements and areas of, personal (behavioural) and professional development and reflect on their learning.

8.6. **External resources**
The following websites contain useful practical advice on appraisals:

- www.acas.org.uk Advisory, Conciliation and Arbitration Service (ACAS) aim to improve organisations and working life through better employment relations.
- www.nhsemployers.org.uk NHS Employers keep employers/managers up to date with the latest workforce thinking and expert opinion, provide practical advice and information, and generate opportunities to network and share knowledge and best practice.

9. Monitoring

9.1. Managers will be required to monitor that the appraisals are occurring and that systematic follow up is in place to ensure appraisals are completed for all staff groups. This will be monitored in the following ways:

- Completion of appraisals will be recorded (see Section 7.6.1.). Using this information Divisional Performance Review reports will be run monthly to provide evidence to the Divisional Directors, Senior Human Resources Team, Executive Team, Board that appraisals are being carried out.

- Audits may be undertaken when data is distributed to outside agencies such as Workforce Development Directorate or Investor in People Assessors to ensure compliance with Policy.

- The annual NHS Staff Survey provides data which indicates the uptake of appraisal for those staff who choose to participate in the survey.

9.2. In addition to the number of appraisals completed, it is important that the quality of application of the process is monitored. The LEaD and the HR team will take ownership for this process and will work with managers to develop a fair and robust process designed to continuously improve the process and the appraisal experience for all concerned.

10. Policy review

10.1. The policy and processes contained within these documents will be in place for three years, following approval of a review and amendments. An earlier review can take place should exceptional circumstances arise resulting from this policy; in whole or in part, being insufficient for the purpose and/or if there are legislative changes.

11. Associated documents

- Education and Development Policy
- Job Evaluation Policy
- Incremental Pay Progression Policy
- Organisational Induction Policy
- Managing Performance (Capability) Policy and Procedure
  Agenda for Change: NHS terms and condition of service handbook

Appendix 1

Summary of the Appraisal Process

Key:

Appraisal Form:
Section 1: Review of the past
Section 2: Confirmation of evidence of professional/clinical competence
Section 3: Plan for the future

Trust & Divisional Strategic Objectives and Business Plans

Team Objectives

Line Manager/Appraiser aligns Business Plan/team objectives with individual objectives

Annual Appraisal *(conducted between April to June Month 4 (July) should be used for finalisation)*	
Appraiser arranges the appraisal	
Appraisee and appraiser prepares for the appraisal	
Appraisee:- • uses 'Quick Checklist' on appraisals to prepare. • reviews job description, previous appraisals • obtains appropriate Appraisal Form:- -completes: Section 1 & 2 -considers: Section 3	Appraiser:- • provides guidance on appraisals (helped by 'Team Brief on Appraisals'). • reviews job description, previous appraisals. • obtains appropriate Appraisal Form:- -completes: Section 1c-Review of behaviours. -checks: Section 2 -identifies: Section 3 – by aligning team and individual objectives (cascaded from Business Plan))
Appraisee and appraiser actively participate in the appraisal meeting	
• The Appraisal Form is used for a basis for discussions. • Appraisee **and** appraiser:- -engage in a two-way honest and constructive appraisal discussion on Section 1 & 2 – past performance -set and agree on Section 3 - future objectives & personal development. -record and agree the outcomes of meeting on Appraisal Form. -sign Appraisal Form and both securely and confidentially retain copies.	
After the annual appraisal meeting	
• Completed appraisal is recorded (see Policy Section 7.6.1). • Completion of appraisals monitored monthly by the Trust.	

Monitor and Review **of appraisee/staff performance, objectives and development by Line Manager/appraiser and staff, through:-**
Regular reviews, at least every 6 months/ Regular 1-to1 meetings/ Informal meetings etc.

Appendix 2: Equality Impact Analysis Screening Tool

Equality Impact Assessment (or 'Equality Analysis') is a process of systematically analysing a new or existing policy/practice or service to identify what impact or likely impact it will have on protected groups.

It involves using equality information, and the results of engagement with protected groups and others, to understand the actual effect or the potential effect of your functions, policies or decisions. The form is a written record that demonstrates that you have shown *due regard* to the need to **eliminate unlawful discrimination**, **advance equality of opportunity** and **foster good relations** with respect to the characteristics protected by equality law.

For guidance and support in completing this form please contact a member of the Equality and Diversity team

Name of policy/service/project/plan:	Appraisal Policy
Policy Number:	SH HR 60
Department:	Human Resources
Lead officer for assessment:	Rita Hawkshaw, HR Manager – Best Practice Ricky Somal, Equality & Diversity Lead
Date Assessment Carried Out:	July 2013, reviewed May 2015 no change

1. Identify the aims of the policy and how it is implemented.	
Key questions	**Answers / Notes**
Briefly describe purpose of the policy including: • How the policy is delivered and by whom • Intended outcomes	This document provides managers and staff with guidance on the how to effectively carry out and participate in the Appraisal process, to ultimately enable staff to be successful in their role and contribute to the delivery of a high quality, efficient, effective and safe service. It will aim to: • ensure the appraisal process is fair and equitable for all employees and that it is applied in line with the Equality, Diversity and Human Rights Policy • increase job satisfaction and ensure employees receive recognition for their achievements; • identify appropriate in-service and corporate learning and development, providing an opportunity for personal development based upon informed feedback and decisions; and • allow for improved succession planning and career development.

2. Consideration of available data, research and information.
Monitoring data and other information involves using equality information, and the results of engagement with protected groups and others, to understand the actual effect or the potential effect of your functions, policies or decisions. It can help you to identify practical steps to tackle any negative effects or discrimination, to advance equality and to foster good relations. Please consider the availability of the following as potential sources: • **Demographic** data and other statistics, including census findings

- Recent **research** findings (local and national)
- Results from **consultation or engagement** you have undertaken
- Service user **monitoring data**
- Information from **relevant groups** or agencies, for example trade unions and voluntary/community organisations
- Analysis of records of enquiries about your service, or **complaints** or **compliments** about them
- Recommendations of **external inspections** or audit reports

	Key questions	**Data, research and information that you can refer to**
2.1	What is the equalities profile of the team delivering the service/policy?	The Equality and Diversity team will report on Workforce data on an annual basis.
2.2	What equalities training have staff received?	All Trust staff have a requirement to undertake Equality and Diversity training as part of Organisational Induction (Respect and Values) and E-Assessment
2.3	What is the equalities profile of service users?	The Trust Equality and Diversity team report on Trust patient equality data profiling on an annual basis
2.4	What other data do you have in terms of service users or staff? (e.g results of customer satisfaction surveys, consultation findings). Are there any gaps?	The Trust is preparing to implement the Equality Delivery System which will allow a robust examination of Trust performance on Equality, Diversity and Human Rights. This will be based on 4 key objectives that include: 1. Better health outcomes for all 2. Improved patient access and experience 3. Empowered, engaged and included staff 4. Inclusive leadership
2.5	What internal engagement or consultation has been undertaken as part of this EIA and with whom? What were the results? Service users/carers/Staff	
2.6	What external engagement or consultation has been undertaken as part of this EIA and with whom? What were the results? General Public/Commissioners/Local Authority/Voluntary Organisations	

	Positive impact (including examples of what the policy/service has done to promote equality)	**Negative Impact**	**Action Plan to address negative impact**			
			Actions to overcome problem/barrier	**Resources required**	**Responsibility**	**Target date**
Age	**Applied to all protected characteristics:** All staff, regardless of position, are entitled to have an annual Appraisal. This provides a specific, more formal opportunity each year for every employee and their manager to have purposeful two-way discussions about their job, present and future, and their specific training and development needs.					
Disability	Southern Health will respond positively to requests for information in alternative formats. This includes easy read, Braille, sign		Access to Communications: interpreting and translation provider.	Equality, Diversity and Human Rights Policy.		

	language and large font .					
Gender Reassignment		No negative impacts identified at this stage of screening.				
Marriage and Civil Partnership		No negative impacts identified at this stage of screening.				
Pregnancy and Maternity		No negative impacts identified at this stage of screening.				
Race	Southern Health will respond positively to requests for information in alternative formats.	No negative impacts identified at this stage of screening.	Access to Communications: interpreting and translation provider.	Equality, Diversity and Human Rights Policy.		
Religion or Belief		No negative impacts identified at this stage of screening.				
Sex		No negative impacts identified at this stage of screening.				
Sexual Orientation		No negative impacts identified at this stage of screening.				