|  |
| --- |
| Your Appraisal is your Time to Talk  Your appraisal is your protected time with your manager/appraiser to discuss your job role, your achievements and review what support you may need. The form has been designed with the appraisal meeting in mind, in a manner that reflects how the appraisal conversation may flow.  Your annual appraisal forms part of your ongoing conversations with your manager. If you feel you need to raise something, don’t wait for your appraisal, speak to your manager in your regular meetings such as one to ones, quarterly reviews, or arrange an appointment to see them.  This appraisal form is for all managers, team leaders and supervisors, except Medical staff/GMC registered who have their own separate process and documentation. This form must be completed after reading the guidance document which can be found under A on the intranet or following this link [Appraisals (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/appraisals/) |

|  |  |  |  |
| --- | --- | --- | --- |
| **Name Appraisee** |  | **Employee Number** |  |
| **Appraiser / Line Manager** |  | **Date of objective setting/last appraisal** |  |
| **Date of next review** |  | **Date of appraisal** |  |

**Part A – Your job role**

|  |  |  |  |
| --- | --- | --- | --- |
| **1** Review against last year’s objectives  Guidance note: Use this opportunity to review what you achieved and any new skills and learning gained/undertaken. It may be that amendments to objectives were needed as a result of being redeployed or because the priorities of the service changed. | | | |
|  | | | |
| 1. Thinking back over the last year - What do you think has gone well?   How have you demonstrated the Trust Values of Kind, Connected and Bold?  This could be an example of showing kindness to patients and colleagues, communicating in a clear and open way, developing and nurturing relationships, seeking out and listening to the perspectives of others, being prepared to tackle difficult situations and supporting your colleagues to thrive. | | | |
|  | | | |
| **3** What do you think has not gone so well over the last year?When reflecting back, were there opportunities for change? Have there been things outside of your control or the Trusts that have impacted on this / you? | | | |
|  | | | |
| **4** Thinking about the future, how can we support your career aspirations? | | | |
|  | | | |
| **5** What have been the highs and challenges for you as a manager in the last 12 months?  At UHB we have an expectation that our managers demonstrate the values and have the right knowledge, tools and approach to leading a team.  For your personal development we have created a ‘Welcome to Leadership programme’ that we expect all our line managers to complete. If this has not yet been completed, please add to your personal development plan. The course can be accessed here [Welcome to Leadership – How to get going as a Team Manager](https://uhb.welcometoleadership.com/) | | | |
|  | | | |
| **6** How have you used feedback to improve team working, relationships and improve outcomes for patients and colleagues? Think about the forms of feedback you have such as 1:1 discussions, team meetings, staff survey results, external surveys and feedback forms. | | | |
|  | | | |
| **7** How have you demonstrated accountability for ensuring that the staff in your team are treated respectfully, fairly and equitably, and that any concerns they raise are listened to and actively resolved? As an NHS manager how has your approach adhered to the Code of Conduct for Managers which can be found [here](https://webarchive.nationalarchives.gov.uk/ukgwa/+/www.dh.gov.uk/en/Publicationsandstatistics/Publications/PublicationsPolicyAndGuidance/Browsable/DH_4910714) ? | | | |
|  | | | |
| **8** How have you championed or shown allyship to equality, diversity and inclusion, and what impact have you had? Have you provided reciprocal mentoring, and what support has that provided to the mentee and what insights have you put in to practice? | | | |
|  | | | |
| **Objectives for this year**  Your objectives should be agreed between you and your manager. For more on how to set SMART objectives please see our guidance here [Appraisals (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/appraisals/)  Are there any improvements or innovations that you have thought about introducing?  These will be finalised in discussion with your manager during the appraisal meeting. | | | |
| Objective | Key milestones with dates | | Review meeting notes for completion at 6 and 12 month review meetings |
|  |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
| **What development is needed over the next twelve months to help you achieve your objectives and support your**  **career progression and personal development?** | | | |
| Development | When will it be completed | | Review meeting notes for completion at 6 and 12 month review meetings |
|  |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
|  |  | |  |
| **Overall role performance comments - colleague** | | **Overall role performance comments - appraiser** | |
|  | |  | |

**Part B - Health and Wellbeing**

|  |  |
| --- | --- |
| **Is there anything you would like to discuss about your wellbeing and how this impacts on you whilst at work?** This could include anything that matters to you. This could be a review of what you have already made us aware of, such as; caring responsibilities, health conditions or personal circumstances. You may want to include what is a good day and a bad day/what would be a trigger for you at work/ any existing reasonable adjustments. | |
|  | |
| **Is there anything that would support your wellbeing whilst at work which we have not already discussed?** | |
|  | |
| **The way forward to support your health and wellbeing – to be completed together in the appraisal meeting.**  As part of the Trust’s commitment to improving the experience of staff with a disability we need to ensure that your ESR staff record is up to date. | |
| Do you consider yourself to have a disability? A disability is a physical or mental impairment that has a ‘substantial’ and ‘long-term’ negative effect on your ability to do normal daily activities.   |  |  |  | | --- | --- | --- | | **No** |  |  | | **Prefer not to say** |  |  | | **Yes** |  | **Please select a category (Only select 1 option)** Learning disability/difficulty; Long-standing illness; Mental health condition; Physical impairment; Sensory impairment |   Do you have/require any workplace adjustments to carry out your role? **No/Yes**  Record below any reasonable adjustments needed to support you in your role. | |
| Think about what is practical, reasonable and likely to be effective. Detail clearly each action and who will do what. If you are unsure about how to take an action forward, detail who will investigate it and by when. If an adjustment is not currently possible please detail the steps taken to consider this and the reason(s) it is not practical, reasonable or effective. The inclusion team can support with this, including how to contact Access to Work, please contact [inclusion@uhb.nhs.uk](mailto:inclusion@uhb.nhs.uk) | |
| **Action** | **Date/Responsibility** |
|  |  |
|  |  |

**Part C Annual Checks**

|  |  |
| --- | --- |
| **Annual Checks** | Tick when completed or N/A |
| Mandatory and role-based training checked and all up to date or dates booked  **Comments**: |  |
| **Nurses and Midwives** to check progress please see the guidance notes for the annual check template [Appraisals (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/appraisals/) |  |
| **Annual Declaration of Good Character:** I hereby declare that I understand that it is my responsibility to inform the Trust of any change in my status with regard to criminal convictions / cautions / criminal proceedings since commencement of my employment with the Trust or completion of my DBS (Disclosure and Barring Service) Enhanced or Standard Disclosure. The nature of the circumstances of the offence will be considered during review. Please delete the statements that **do not** apply.   * There has been no change in my status regarding criminal convictions / cautions * There has been a change but I have not informed my manager * There has been a change and I have informed my manager |  |
| The following additional annual checks have been carried out see guidance notes [here](https://www.education.uhb.nhs.uk/career-development/appraisals/important-additional-requirements.htm)   * Medical devices * Practice supervisors, and/or practice assessors of trainee nursing associates and nursing or midwifery students only * Non-Medical Prescribing * Safeguarding reflection |  |
| **Annual review of flexible working**  Where there is flexible working already in place review if this is still working for both employee and department, and/or if any changes are required.  Where there is no flexible working in place, confirm if any review of working pattern is required. |  |
| **The Conflicts of Interest Policy (including Sponsorship, Gifts and Hospitality)** requires all staff to declare certain pecuniary benefits. The requirement to make a declaration is dependent on the value of the pecuniary benefit (gift/ hospitality/sponsorship) and whether the 'giving' party has a relationship with the Trust ('Interested Third Party'). Under the Staff Code of Conduct all staff have to declare actual, potential or perceived conflicts of interests which might arise out of secondary employment, the holding of shares, etc.  The below staff groups must review and update existing declarations, or make a nil return, on an annual basis:  • Staff on Consultant contracts revalidated through the Trust  • Staff on Agenda for Change Band 8c and above  • SAS Doctors  • Staff who are not covered by the above but earn the equivalent of the starting salary of an 8c  Appraisee declaration - I confirm that I have read and understood the aforementioned Conflicts of Interest Policy (including Sponsorship, Gifts and Hospitality) and Staff Code of Conduct and have made all relevant declarations. [Conflict of interest declaration form](http://uhbhome/conflict-of-interest-declaration-form.htm). |  |
| **Individual’s Signature** |  |
| **Manager’s Signature** |  |
| **IMPORTANT – ACTION REQUIRED:**  Appraisers: Please make sure that this appraisal is reported. To register this on the reporting tool please follow this link[**Appraisals (uhb.nhs.uk)**](https://www.education.uhb.nhs.uk/career-development/appraisals/reporting-an-appraisal.htm)  A copy of the documentation must be kept in the staff member’s personnel file and a copy kept by the appraisee. | |

|  |
| --- |
| **Resources** |
| **Wellbeing Resources:** For guidance on our Trust wellbeing offer, information on managing your physical health and mental wellbeing including staff support, staff networks, menopause support (including the menopause passport) and financial support, please see our intranet pages [Wellbeing](https://www.uhb.nhs.uk/hr/well-being/)  **Development Resources:** please see the [Education (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/) which includes the career developmentpages or[Career development (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/). Apprenticeships are available for all staff, both Clinical and Non-Clinical and are an excellent way to develop and learn new skills. Contact the Team at [**apprenticeships@uhb.nhs.uk**](mailto:apprenticeships@uhb.nhs.uk)**.**  **On-line Learning**  **Moodle and easylearning:** UHB colleagues can access [Moodle](https://www.education.uhb.nhs.uk/platforms/moodle.htm) to complete online learning including mandatory training, inclusion resources and other courses whilst [Easylearning](https://www.education.uhb.nhs.uk/platforms/easylearning.htm) allows you to book courses and track your progress. Both systems can be accessed here: [Platforms (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/platforms/) **Barclays Digital Wings:** We have partnered with Barclays Digital Wings, to give you access to an entire suite of online-learning modules that can be accessed any time, from home or work, to help boost your digital skills and confidence inside and outside of work. From improving your Word, PowerPoint, Excel and Teams skills, to learning how to use YouTube, Facebook and Instagram, all whilst staying safe online. Register here [Barclays Digital Wings](https://education.uhb.nhs.uk/platforms/barclays-digital-wings/)  **Mentoring:** You can find out more on mentoring opportunities at the Trust via this link [Mentoring programme (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/mentoring-programme/) The reciprocal mentoring programme is open to all staff at all levels and will see "senior" colleagues randomly paired with a more "junior" colleague to form a mentoring partnership [Reciprocal mentoring](http://uhbhome/reciprocal-mentoring-2.htm)  **360 degree:** This tool can be used to gather wider feedback on behaviour and should be undertaken around the time of the appraisal. For more information, please look on the intranet under appraisal.  **HR website:** This includes information and guidance on flexible working (including home working), guidance on taking time off work, work life balance, occupational health; pay; performance improvement and employee relations. [HR website (uhb.nhs.uk)](https://www.uhb.nhs.uk/hr/)  **Management and Leadership - There are many development opportunities for our leaders**  **Building Healthier Teams**: For all colleagues, it has a wealth of resources to access the [**www.buildinghealthier.co.uk**](http://www.buildinghealthier.co.uk)**.**  **Welcome to Leadership:** has been designed to provide people managers and those considering a leadership position at UHB with the fundamentals they need to lead and manage their teams effectively. Comprising of seven modules of content in total, Welcome to Leadership is accessible from any device with an internet connection, and from any location. It’s also available in multiple formats, so you can watch, listen, or read, depending on what suits you best.  The recommendation is to complete it within six months – which averages a commitment of just one hour a month.  All you have to do is visit the link below and sign up with your @uhb.nhs.uk email address to get started.  <https://uhb.welcometoleadership.com/registration/>  Please visit the For Management and Leadership pages on the education website [Management and leadership (uhb.nhs.uk)](https://www.education.uhb.nhs.uk/career-development/management-and-leadership/) with information on National NHS Leadership Academy courses are named after inspiring leaders who made a significant difference to health and patient care; there will be one that is perfect for you! Please see [**www.leadershipacademy.nhs.uk**](http://www.leadershipacademy.nhs.uk)for more information.  For any queries email **leadership@uhb.nhs.uk**. |