



RHONDDA CYNON TAF COUNCIL

# INDIVIDUAL PERFORMANCE REVIEWS

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## Employee Guide

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**The Council's vision is for Rhondda Cynon Taf to be the best place in Wales to live, work and play, where people and businesses are independent, healthy, and prosperous.**

The Council exists to provide strong community leadership and create the environment for people and businesses to be independent, healthy and prosperous.

Mae'r ddogfen yma ar gael yn y Gymraeg / This document is available in Welsh.



# Individual Performance Reviews:

## An employee' guide to the What, Why and How

The Individual Performance Review process will ensure that you are clear about what you are expected to deliver to meet Council priorities, what you are accountable for and what training, support and development opportunities you may need to improve further.

You have the right to have your review conducted through the medium of Welsh. Please let your manager know your language preference when arranging your review so that they can make appropriate arrangements (such as simultaneous translation) where necessary.

### **What is an Individual Performance Review?**

An Individual Performance Review is an opportunity to sit down with your manager to have an open conversation about how you have been doing in your job, the challenges and opportunities that you are facing, support you need to perform well and to identify any development needs and career aspirations to work towards. It is a chance to look ahead and set some goals/objectives.

The meeting should be a summary of your regular one to ones and performance discussions that are held throughout the year, so nothing in this meeting should come as a surprise to you or the individual.

### **How often will I have an Individual Performance Review?**

Once a year however Individual Performance Reviews should complement your existing process of regular 1-2-1 and/or supervision sessions.

### **Why are Individual Performance Reviews important?**

Individual Performance Review meetings provide an opportunity to review and reflect on your performance over the last 12 months but also to identify what is needed for the next 12 months.

Regular conversation and feedback encourages productivity but also enables issues to be highlighted and resolved quickly. You want to know how you're performing and what you can do to improve your performance. Discussing performance and receiving feedback is not always easy but it is important to your continued success and the success of your team.



Individual Performance Review meetings provide you with an opportunity to share information with your manager through face-to-face interaction whether in person or via Teams.

## What are my responsibilities as an employee?

### ➤ **Before the meeting**

Have a conversation with your manager to talk through the process and arrange a suitable time and location for the review meeting – this could be in person or via Teams. Let your manager know if you have any specific requirements relating to things such as accessibility.

Familiarise yourself with the [Individual Performance Review template](#) prior to the meeting with your manager.

Take time before the meeting to consider the questions detailed on the template. Think about the past 12 months in terms of what went well, what you enjoyed, what you found difficult and what you have learned. Think of some examples and make some notes to remind you during the meeting. Examples could include:

*“I hit my targets for taking customer calls”*

*“I struggled to manage priorities and plan my time when it got busy”*

*“I completed an e-learning course on customer service skills”*

*“I got some great feedback from customers”*

You may be required to provide evidence of achievements/success – ensure you have access to relevant documents or information during the meeting.

Also think about the next 12 months; what do you want to achieve? Is there any training you think may benefit you and are there any development opportunities you would like to explore.

By preparing properly you will be able to highlight areas of work that you think can be improved.

If you are unsure about any aspect of the process, please discuss this with your manager prior to the meeting.

### ➤ **During the meeting**

There should be an open discussion between you and your manager about how the previous 12 months have gone. Be honest.

Your discussion should cover performance, development and career plans.



The meeting offers opportunity to identify how you can improve your performance, the support you may need from your manager to achieve this and your goals for your development and future career. Thinking about these topics before the meeting will help you to focus the discussion and reach a mutually agreed way forward for the next 12 months.

Think about whether additional training will benefit your development and identify what that training will look like, it doesn't always have to be a formal course or qualification.

Below you will find some examples of different types of training and development that may be available within your team, department or internally within the Council:

<p><b>Learning through doing</b></p> <ul style="list-style-type: none"> <li>• Challenging on the job assignments</li> <li>• Job rotation</li> <li>• Mentoring</li> <li>• Project teams</li> <li>• Working groups</li> <li>• Conducting research</li> <li>• Report writing</li> <li>• Collecting and analysing data</li> </ul>	<p><b>Learning through others</b></p> <ul style="list-style-type: none"> <li>• Coaching and mentoring</li> <li>• Visibility through project teams and working groups</li> <li>• Networking</li> <li>• Support learning to be put into practice in the workplace</li> <li>• Look for opportunities</li> </ul>
<p style="text-align: center;"><b>Learning through resources</b></p> <ul style="list-style-type: none"> <li>• Training and development courses</li> <li>• E-learning</li> <li>• Formal qualifications</li> <li>• Professional qualifications and certificates</li> </ul>	

➤ **Setting goals/objectives**

You should discuss setting goals/objectives relevant to your job role. It is important not to just focus on quantifiable measures. These may be related to performance, development or training and should be S.M.A.R.T:

**Specific** – what do you want to achieve?

Example: Your goal could be to “To improve prioritisation skills” but a more specific goal could be “To complete the e-learning module to improve prioritisation skills”.

**Measurable** – how will you measure/track progress?

Example: “To increase the number of customer calls made to 10 a day” is more measurable than “To increase the number of customer calls made”.



**Achievable** – is it realistic within the scope of your role?

Example: “To aim to be punctual for work and to ring ahead if there are delays beyond your control” rather than “To never be late for work again” which would be unachievable.

**Relevant** - does it fit within your role?

Example: “To complete a Social Work degree” is not a relevant goal if your role sits in the engineering department.

**Time-bound** – when do you aim to complete each stage?

Example: “To complete a mentoring programme between June and November” gives the employee a more realistic timeframe than simply “To complete a mentoring programme”.

To ensure you set SMART objectives:

Write down the goals/objectives for the year and test them against the SMART guidelines above. If necessary, edit the goals/objectives.

During your discussions you should reach agreement about what the expected outcome is and how that will be measured. Make provision for goals/objectives to be reviewed regularly, for example these can be reviewed and monitored in one-to-ones or specific follow up meetings. Agreed goals/objectives can be recorded on the Individual Performance Review template.

### ➤ **After the meeting**

Following the review, the manager and employee are responsible for monitoring and reviewing progress of the agreed objectives/goals throughout the year.

We do not require a copy of your review; this should be kept by you and your manager for monitoring purposes for 2 years following the date of review completion. You should discuss progress towards achieving goals on a regular basis, for example in 1:2:1s or specific performance review update meetings. If you have a new manager or move to a new team or department, you can share a copy of the review with your new manager to ensure that set goals are still relevant and to agree new goals if appropriate.

Please note that some sectors will have their own arrangements for storing and retaining individual performance reviews and may need to keep reviews for longer to comply with statutory requirements. Where this applies, please ensure that you comply with department guidance. Relevant areas where this applies includes social work and social care.



Once complete, your manager will sign off your review on iTrent. Goals set during your review can also be recorded on iTrent. You will be able to view the sign off details by logging in to your Employee Self Service.

A step-by-step guide to viewing the sign off and how to view, add and update your goals can be found in the **Your Employment – [Your Performance Review](#)** section of the Source or **Your Employment – Your Guidelines**

### **Contact Details**

If you have any queries, please do not hesitate to contact [HRPerformanceReview@rctcbc.gov.uk](mailto:HRPerformanceReview@rctcbc.gov.uk).