
Performance Review and Development Process

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1 Performance Review and Development Process

1.1 Performance review is a joint collaborative process between managers and staff members which should take place both formally and informally throughout the year. Continuous dialogue throughout the year between the manager and the staff member should inform the agenda of the meeting and the outcome of the meeting should be a clear plan for both participants in terms of taking action to ensure that the staff member is enabled to achieve their full potential in the work that they carry out for the organisation.

2 Objectives

2.1 The objectives of the Performance Review and Development Process are as follows:

- To provide a platform for managers and their staff members to review aspects of job performance to enable them to perform their job to the best of their ability and to make the best contribution.
- To recognise the staff member's contribution to the delivery of services and to the achievement of the Ombudsman's aims and objectives.
- To add value in identifying individual training, development and career needs.
- To provide a framework for setting out and agreeing a personal development plan. Discussions on such needs should focus upon genuinely assisting the staff member in acquiring the relevant skills, knowledge and behaviours (competencies) for them to perform well in their current role. These should be considered in the context of the Identifying Training and Development document. Opportunities for advancement or alternative work may also be on the agenda.
- To provide a framework for evaluating any training undertaken.
- To review methods of working and associated work related issues.
- To provide an opportunity for staff members to raise any other concerns they may have and to make suggestions for improvements to their manager.

3 Annual Performance Review Procedure

- 3.1 Formal performance review meetings will take place annually between April and June. Managers should arrange a meeting with staff members to review their overall performance development and to agree and set objectives over the next year. All sections of the form should be reviewed and completed jointly during this meeting.

4 Interim Review Procedure

- 4.1 There should be at least one interim review, to be completed in the middle of the year. Additional interim reviews can be arranged where there are changes to objectives or roles.
- 4.2 A note should be made of the interim review(s) (using the shaded areas of the form). Any changes to objectives should be noted, together with progress against objectives and updates on training and development. New objectives can also be added where applicable and these should also be noted as new objectives and dated.

5 Disagreement

- 5.1 Since there is no proposed grading or scoring of staff, and since good performance and personal development are goals shared by all staff and managers, this should not be a confrontational process. Where the member of staff and manager have different views on performance against objectives, or on objectives for the forthcoming year, these should be resolved between them. Where this is not possible, and where the difference of view is significant, the manager of the member of staff may refer this to the manager's line manager for consideration.
- 5.2 Where there is minor disagreement on a particular objective or point, this can simply be recorded on the form.

6 Further information

- 6.1 Please refer to:

- Guide to PRDP Process;
- PRDP Guide for Employees;
- PRDP Guide for Managers;
- Identifying Training and Development; and
- the PRDP form.

7 Review and publication

7.1 This policy will be reviewed every three years and will be published internally and externally.

Any inquiries about this policy can be directed to policycontrol@ombudsman.wales.