



MAKE IT COUNT

YOUR PERFORMANCE - YOUR REVIEW

Performance Review Toolkit

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**MAKE IT
COUNT**

YOUR PERFORMANCE -
YOUR REVIEW

What's the Purpose of a Performance Review?

Designed as a helpful, constructive conversation between you and your manager, where you:

- ✓ look back and celebrate your work over the past 6 months (at mid year) or 12 months (at end of year)
- ✓ through reflection and feedback, identify where you've done well, and how you can improve and develop
- ✓ Check in on personal well-being and make sure the staff-manager-team relationship is working well
- ✓ plan goals for the upcoming 1-3-6-12 months so you know where and how to focus your work activity in a time of changing priorities
- ✓ set a Personal Development Plan to help you develop – considering both your current role and challenges and your career aspirations

In your own words...

We asked GLA staff and managers about what they find most helpful about their annual performance conversation – here are some of their answers.

“An opportunity to spend focused time with members of my team is extremely valuable. The purpose for me is to give my staff undivided attention, to take a broad look at how they are doing, what they are delivering and how they can be best supported to progress.”



A word cloud on a teal background featuring various themes from performance conversations. The words are arranged in a cluster, with 'celebrate' and 'year' being the most prominent. Other visible words include 'preparation', 'feedback', 'discuss', 'development', 'learning', 'constructive', 'encouragement', 'achievement', 'support', 'confidence', 'motivating', 'relationship', 'success', 'praise', 'reflect', 'aspirations', 'ahead', 'career', 'affirmation', and 'development'.

encouragement
preparation
feedback
praise
achievements
relationship
success
motivating
confidence
discuss
celebrate
support
affirmation
ahead
successes
reflect
year
career
development
learning
constructive

Performance Review Overview

STEP 1

Book time



STEP 2

Prepare



STEP 3

Have a 1:1 conversation



STEP 4

Finalise the record of the conversation
(30 June for annual review;
31 December for mid year review)



Part 2.

STAFF TO DO



- ☐ Schedule a review time with your manager (ideally 1h, at least 45 minutes) face to face using MS Teams
- ☐ Take time to prepare for the review. Use the [Performance Review template](#) to support self- reflection (set aside 45mins)
- ☐ Send a copy of the completed review template to your line manager prior to your review

Have the review conversation

- ☐ Add staff comments and any other amendments to performance objectives and Personal Development Plan (15 minutes)

Save an electronic copy for own records

- ☐ Send to line manager

LINE MANAGER TO DO

- ☐ Ensure all eligible staff in your team have a review time
- ☐ If you have team members who are not eligible for a review mark the reason against their name in SAP (annual review only)
- ☐ Reflect on the team member's performance over the year and feedback already provided in 1:1s – set aside 30 minutes per member of staff

- ☐ Add manager notes of key points of discussion, review and confirm performance objectives and Personal Development Plan (15 minutes)

- ☐ **Annual review only:** send a copy to a senior manager (line manager's manager) and mark review as complete in SAP by 30 June



How much time is the process supposed to take? We should set aside 2h in total for our own performance review including preparation and write-up. Line managers should allocate up to 2h per staff member.

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How to Prepare for our review?

To make the most of our performance review we need to prepare and to reflect on our:

- Performance over last 6-12 months
- Development needs and career goals
- Competencies and behaviours (strengths and development areas)
- Look at copies of your previous reviews
- Visit our [Performance Management site on the intranet](#) to access:
 - The Preparation for Performance Review Guide
 - Examples of performance management forms based on anonymised real examples
- If you have questions, contact the MyHR helpdesk tel. 0808 715 4246 or by email: myHRHelpdeskGLA@tfl.gov.uk.



Self-reflection is not easy but worth it as it helps us learn and develop.

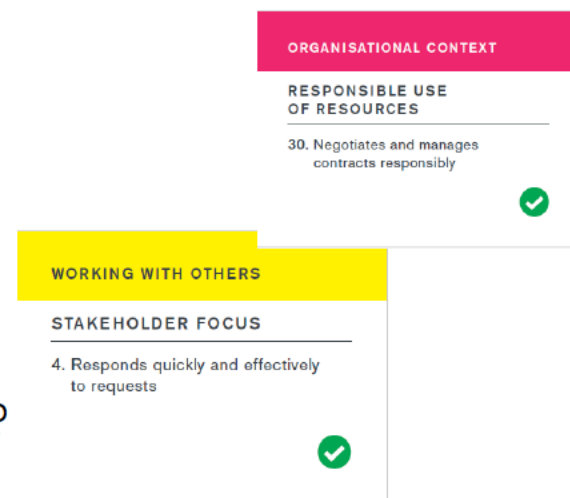
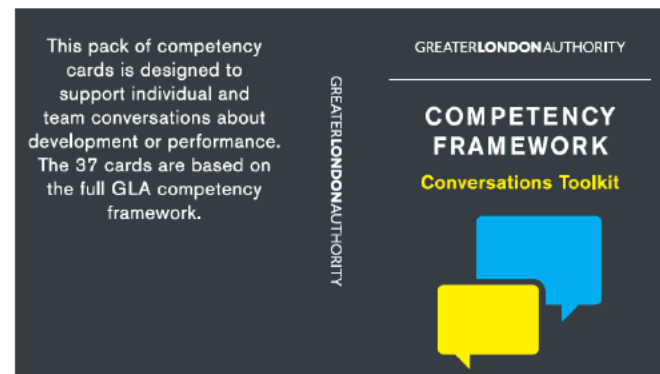
The Performance Review Template is designed to support you to self reflect

Part 3.

Competency card sort

The **simplified competency cards** are a helpful tool for carrying out a self-assessment against job competencies. Take a pack of cards:

- **Step 1.** Identify the competencies relevant to your role (you will find the list of 6-8 competencies in your job description). Put the remaining cards into the box.
- **Step 2.** Using the relevant cards, sort them into two piles (use the positive indicator side with a green tick):
 - Behaviours you demonstrate frequently and well
 - Behaviours you don't demonstrate enough, or not as effectively
- **Step 3.** Prioritise 1-2 cards in each pile. Can you think of examples? Make a note of those.
- Use the conclusions in the self-assessment section of your review template and as a basis of your conversation with your line manager.



Would you like to incorporate feedback from others in your self-assessment?

Think of 2-4 people you work with most closely. Ask them to carry out the same card sort as above and provide you with some examples. Compare and look for themes.

Stop Start Continue



If you don't have access to the **simplified competency cards** or would like to get feedback from stakeholders you can't see face to face, STOP/START/CONTINUE is a helpful structure for a simple, quick 360-degree feedback.

Step 1. Think about who you'd like to ask for feedback. Ask your manager for suggestions.

Step 2. Email your stakeholders with a short note about why you are asking them for feedback and how you'll use it. Ask them to email you back with answers to the 3 questions:

- *What do I currently do, which I should **STOP** doing, in order to be more effective?*
- *What do I not do currently, which I should **START** doing to become more effective?*
- *What do I do well currently which I should **CONTINUE** doing to remain effective?*

Step 3. Collate the feedback and reflect on it. Incorporate a short note in your performance review self-assessment and discuss the feedback and what it means for your performance and development in your review meeting.



Unsure what to make out of the 360 feedback?

Identify key themes or questions coming out of the feedback. Ask your manager and/or other people who provided the feedback for 1-2 specific examples to bring the themes/questions to life.

How to Prepare if you are a Manager?

- Think about how you'd like **your member of staff** to feel at the end of the meeting.
 - *Discouraged? Worried? Demotivated? Bored? Or*
 - *Reassured? Inspired? Energetic? Motivated?*
- With that in mind, think about the upcoming meeting. What kind of conversation, feedback, coaching questions or suggestions are likely to have that impact? The meeting should leave you both feeling energised, in agreement about what needs to be achieved, and that your relationship has improved.
- You know your member of staff and **what motivates them and what kind of feedback works well to help them perform to their best**. If not – take time during this performance review to discuss this.
- **Well-being and engagement** of our staff directly influences their performance, and is of paramount importance to the organisation's ability to serve Londoners. What actions can you take to support your member of staff's well-being? If not sure, ask them!



The review meeting should not be about the form and going through it line by line. But do take time to read it as your staff member's input and to help prepare for the conversation.

Focus on what's most important and the here and now – there is no need to analyse every single performance objective or go through the self-assessment line by line.

Reflecting back conversation

The purpose is to help reflect on and celebrate the staff member's achievements and learning in the last 6-12 months and check in on their personal well-being. Capture any agreed actions as part of the comments section.

How are you doing?

How is work going for you?

How are you getting on with key stakeholders?

Do we need to make any further adjustments to your way of working?

Is the current level of communication between us working? Do we need more/less regular catch ups?

Are you aware of the different sources of support e.g. EAP?, Staff Networks, learning options

What's gone well?

What are you most proud of in terms of what you achieved in the last 6-12 months?

What new expertise or competencies have you developed?

What impact has the learning had on your performance?

What's working well in terms of working together/within the team?

What support do you need?

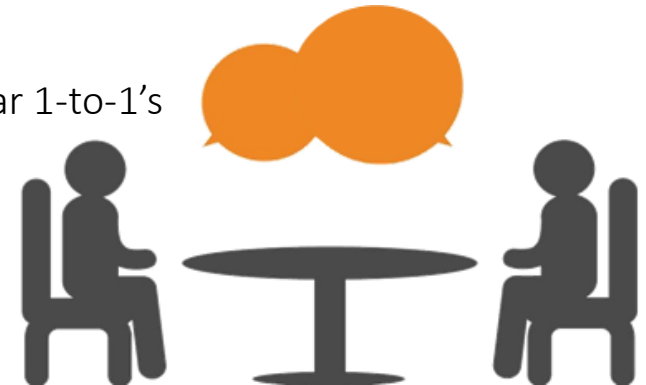
What do you need to be at your best?
What level of guidance, support and feedback works best for you?
Does the work you are doing need re-prioritising or clarifying?
How can we set short to medium term meaningful goals (objectives) so that you are clear on the expectations and that they are realistic?

What does the Performance Review conversation look like?

A performance review is a conversation between two people who care about each other and who take time to discuss a wider picture of how things are going for the individual at work.

A good performance review should :

- Be a dedicated meeting to focus on you (1 hour ideally, minimum 45 minutes) taking place face to face or via MS Teams. To help rapport and communication it's best to keep video cameras on if you have to meet virtually.
- Provide an opportunity to have positive, open, honest, two way conversation between manager and team member
- Be a continuation of the conversations you are having in your regular 1-to-1's (nothing should come as a surprise)
- Provide a clear shared understanding on achievements, next steps, goals and performance development
- Be helpful and constructive.



An inclusive performance conversation?

Here are some tips to consider.

- Make sure that the time and location works for both member of staff and the manager for an **undisturbed conversation**. While a face to face meeting is always preferred, it is possible to have a helpful virtual performance conversation – but you need to mutually agree this
- If concentration is an issue, consider **having a few, shorter conversations**. Having a separate conversation about what's happened in the past 6-12 months (Looking Back); and objective setting and personal development planning (Looking Forward) tends to work well.
- Set the **tone** - demonstrate that you are both open to feedback and ideas. The conversation should be two-way
- Be **consciously inclusive**. Pay attention to your own **body language** and that of other person. Be open, attentive and affirming. Notice what the other person may be communicating through their voice and body posture.
- **Listen carefully and check understanding**. Make sure you are listening to what the other person is saying without cutting in. Ask to clarify if necessary.

Two-way feedback

The review meeting is a two-way discussion with feedback given and received by both the manager and team member

- Start with positive feedback - what is going well? What works?
- Are there opportunities for improvement? What could be better?
- Have specific examples to demonstrate what you have to say.
- Talk about what has been achieved (objectives) as well as how it has been achieved (behaviours)
- Concentrate on what can be changed – e.g. behaviours not personality (use the language and examples in the [GLA competency framework](#)).
- Listen carefully to what is said in response to your feedback – check that it has been understood and be prepared to adapt your view.
- As a manager, ask for feedback on your management style, the support you provide to staff and the way you lead your team. How well is the team working together as a whole?
- Show compassion and, above all, look to affirm what works and build a positive working relationship.



A performance review is a great opportunity to focus on long term career goals and next steps.

Career conversation

As part of the review discussion, set time aside for a career conversation. The purpose is to help reflect on the staff member's career aspirations and the next steps.

Where are you now?

Which aspects of your role do you really enjoy? Which aspects might you like to change?

What skills and experience have you developed through current role, [volunteering](#), participation in staff networks etc.?

What feedback have you received?

How do people in the organisation see you?

Where would you like to get to?

What does success look like?

What personal [strengths](#) do you like to use? What activities would you like to do more of?

What are your values in relation to work?

What work environment do you prefer?

Who do you most enjoy working with?

What will help you get there?

What are the next steps which will help you move towards the long term career goal?

What are you ready for? What is achievable in the next 6 months?

How can the manager and colleagues support you?

Capture these actions as part of the updated personal development plan.

Looking ahead

Objectives & Development

- Agree performance and development objectives for the coming 1-3-6-12 months (as far as is possible)
 - What timeline is meaningful and practical in setting goals and expectations?
 - A short timeline is fine – objectives, above all, should be live and regularly updated.
 - 1:1s and the mid year performance review are perfect opportunities to check goals, priorities and support needed to meet them

All staff must have a tailored Equality, Diversity and Inclusion objective.
- Make sure your objectives are SMART with measurable performance indicators agreed (indicators should include behavioural measures linked to [competencies](#))
- Discuss development needs and agree /amend development objectives



Taking action on staff development

All managers at the GLA have a performance objective to focus on and take action on their staff development

- Check in on **progress** of their PDP goals in the 1:1 meetings
- Encourage and enable time off for **volunteering and staff network activities**
- The best way to help with career progression is for managers to incorporate stretch projects, which help gain experiences and competencies essential to progress your staff's career.
- Thinking of **your own network**, how you can facilitate helpful contacts and conversations to help your staff's development (think shadowing, mentoring, secondment opportunities)
- Above all, show interest, share feedback and ask what other support staff need to develop their careers.

Who needs a Performance Review?

All staff except:

- Staff on probation
- Staff on long term leave such as maternity, sabbatical, long term sickness

If staff recently completed 5 month probation review OR recently returned from long term leave, use the annual review to set objectives for the next 6-12 months.



Note for Managers (for annual performance reviews only)

Completion of annual review conversation or any exceptions set out above must be recorded on SAP (guidance to be shared at end year.)

Still unsure?

- Visit our [Performance Management site on the intranet](#) to access the following resources:
 - Performance Management Guidance
 - Performance Management Template
 - Performance Management FAQs
 - Effective and ineffective examples of performance management records
 - Effective preparation tips
 - Career conversation handout
 - EDI draft objective to tailor
 - Performance Review Toolkit with tips on how to self reflect and prepare
- Access training
 - Performance Management training for [staff](#) and [managers](#)
 - [Feedback Skills \(for managers\)](#)
 - [Coaching Tips and Techniques for managers](#)
- Contact the MyHR helpdesk tel. 0808 715 4246 or by email: myHRHelpdeskGLA@tfl.gov.uk.