

Performance review templatePlease tick: ☐ Annual performance review ☐ Mid-year performance review

Name:			Job title:		
Unit:		Review date:		Line manager:	

This template is to help you prepare, structure and record the performance review conversation at end of the year and (optionally) at mid-year. It is important that you read the [accompanying guidance](#) before your review conversation.

Annual or Mid-year Review – Looking Back

In preparation for your performance review meeting with your line manager you need to:

- Complete self-assessment on your performance over the last 6-12 months (**Objectives, Competencies, Learning, Volunteering and Staff Networks**) and provide feedback on your **Team** and **Career Aspirations** sections.
- Email the template to your manager to look at before your performance review meeting.

Self-assessment - Objectives (please send to your manager prior to the review meeting)

Objectives Please insert objectives set during the last performance planning meeting.		Performance indicators - assessment What are your key achievements against your performance objectives? What is the evidence based on performance indicators set for your objectives in the past 6/12 months? Other comments.
1		
2		
3		
4		
5		
6		

Self-assessment- Competencies, Learning, Staff Networks, Volunteering and Team
<p>Competencies</p> <p>Your job description sets out the behaviours or competencies expected in your role. How well have you demonstrated these? Provide evidence for 1-2 competencies you have demonstrated really well and 1-2 that you think you need to develop further. If unclear, you should contact the People Function for an up-to-date version of your job description.</p>
<p>Learning</p> <p>What learning and professional development have you undertaken in the last 6-12 months and what has been the result? Think about stretch projects, events, shadowing, mentoring, and training. What new competencies, technical skills or knowledge have you acquired? What learning has had the biggest impact on your performance in your job?</p>
<p><u>Volunteering</u> and <u>Staff Networks</u></p> <p>The GLA encourages staff to get involved in volunteering and staff networks. Staff volunteering and participation in staff networks offer opportunities to learn new skills, meet people and gain valuable experience beyond our core roles. If you had an opportunity to volunteer or get involved in staff networks over the last 6-12 months, how did these activities help your development goals or objectives?</p>
<p>Team and Well-Being</p> <p>Please provide feedback on personal well-being, your team, working environment (including remote working) and line management.</p>

Career readiness and aspirations - Please tick:

- ☐ **Strengthen** - If new to role and / or still developing in it / could demonstrate higher performance in current role.
- ☐ **Stretch** - If performing well in role, and ready to develop for the next step by taking on stretch projects within role.
- ☐ **Move** - If ready for a career move in 6-12 months and have a clear, achievable next step.

You can use this section to record anything else you want to add into the conversation about your aspirations for the next year and beyond. You should also consider and be prepared to discuss the following questions in your review:

- Which parts of your job do you feel you have done particularly well? Why?
- What parts do you feel have not gone so well? Can you say why?
- Do you think your job has changed? How? Do you need to review the job description?
- What are your career aspirations and how might you meet them?

Consider using the [icareercoach™](#) resources to help you reflect on your career aspirations and goals.

Manager comments

This section is for you to add a summary of the discussion that took place at the performance review meeting. You can add additional comments on the self-assessment against objectives and competencies. You should not include what was not discussed during the meeting.

- Has your member of staff met the objectives to the required standard?
- Have they demonstrated the competencies relevant to their role?
- Please use this space to highlight successes or key strengths as well as development areas where performance standards were not met.
- Please refer both to objectives (the 'what') and competencies (the 'how').
- Please use this space to recognise any further contributions your member of staff has made to the GLA; for example, volunteering or participating in staff networks.
- Comment on any career development and professional development activity you have agreed for the coming year. This should be recorded in the development plan.

Please summarise your discussion and any actions you agreed with your member of staff during the performance review meeting. Remember to recognise achievement or progress and provide specific examples to explain good performance and also how performance could be improved.

Employee comments

This section is for you to add comments on your performance following the discussion you had with your manager at the performance review meeting.

Performance planning – Looking Forward

Performance planning stage should be undertaken during the same meeting as the annual/mid-year performance review or soon after. Objectives and performance indicators should be SMART (S-pecific, M-easurable, A-chievable, R-elevant, T-ime-bound). If priorities are changing set short term objectives and review regularly.

There are [mandatory performance objectives](#) (with recommended performance indicators) for all staff (Diversity and Inclusion) and for all line managers (Staff Development). Please discuss and tailor these objectives to make sure they are meaningful and relevant to your role. Progress against all performance objectives should be discussed regularly (through 1:1 meetings at least monthly) and progress documented during the mid-year and end year reviews.

The Personal Development Plan should address any learning needs and development goals identified through the performance assessment of objectives/competencies, new challenging objectives or career aspirations. The plan should not only focus on formal training, but may also incorporate other, flexible forms of learning and development, such as mentoring, research, staff network activities, volunteering, shadowing, projects, etc. You should also consider how you will develop skills and knowledge to support your future career development.

New (annual review) or reviewed (mid-year review) objectives for the next 1, 3, 6 to 12 months

Individual Objectives These should be linked to organisational, directorate or team objectives		Performance indicator Measures of success: how will you know you have achieved the objective? You should provide a mix of milestones, targets and behavioural measures (see competencies).	Timescale for completion
1			
2			
3			
4			
5			

Personal Development Plan

Development objective (related to competency or technical skill/knowledge)	Development method (reading, mentoring, elearning, volunteering, research, project work, contribution to staff networks, workshps, shadowing, etc.)	Further detail (e.g. timescale, learning activity title, cost, name of the person to be shadowed, details developmental/volunteering project, organisational and personal benefit of development)	
Complete all mandatory learning requirements	e-learning/facilitated workshops	See below for learning checklist	
Learning Checklist Please confirm you have completed the following mandatory courses. Visit L&OD pages for more information or find details of completion on MyHR and eZone.			
Mandatory training for all staff	Completed Yes / No	Mandatory training for managers (in addition courses listed for staff)	Completed Yes / No
GLA Corporate Induction workshop (new staff only)		Read the Managing People guide and Manager's zone	
Unconscious Bias e-learning		Routes to Resolution	
Dignity and Inclusion workshop (completion within the last 3 years)		Cornerstone – introduction to management development (for those wanting to access management development)	
Public Sector Equality Duty (if relevant to your role)		Inclusive Managers workshop	
Let's Talk About Race workshop and elearning		Recruitment and selection (hiring managers only) (completion within the last 5 years)	
Disability Awareness elearning		Disability awareness workshop for managers	
Health and Safety Induction e-learning module (completion since April 2022)		Health and Safety workshop for managers (completion within the last 2 years)	
Corporate Governance e-learning module (completion within the last 2 years)			
Security Briefing (completion within the last 3 years)			
Information Governance (Covers FOI requests) (completion within the last 3 years)			
Responsible Procurement elearning (if procuring over 25k) (completion within the last 2 years)			
Cyber Security e-learning (completion within the last 2 years)			
Performance Management (for staff or managers) (completion within the last 5 years)			

I confirm that I have attended a performance review meeting, received feedback on my performance and had an opportunity to provide input and discuss my career aspirations.	Employee's signature and Date:	
I confirm that the performance review meeting took place, and I recorded the completion of the performance review on MyHR by submitting the appraisal confirmation eForm (annual review only). I will send the completed form to my manager for information.	Manager's signature and Date:	

Registration and declaration of interests (To be completed at annual review only)

As part of our commitment to the highest standards of conduct and good governance, all staff need to register any interests that may affect their work. This is not just about obvious financial interests but might include other employment, trusteeships, directorships, or other unpaid roles with outside organisations/charities. You must also declare the interests of any connected person for example your spouse or civil partner – as well as close family members or personal friends. This is set out in more detail in the [Code of Ethics and Standards for Staff](#). Further information can be found via this link [Registering and Handling Interests – staff guidance](#).

<p>Declaration of interests Have you anything to declare, in accordance with the GLA's Registering and Handling Interests - Guidance for Staff. Yes <input type="checkbox"/> if yes, the Monitoring Officer intranet page includes the Register of Interests form - Staff and Register of Interests form - Elected Members, Mayoral Appointees and GLA Heads of Unit and above you need to complete to declare an interest. No <input type="checkbox"/> No further action required</p>	Employee's signature and Date:	
<p>Gifts & hospitality Have you anything to declare, in accordance with the GLA's Gifts & hospitality – policy & procedure for the acceptance of by staff? Please tick: Yes <input type="checkbox"/> if yes, the Monitoring Officer intranet page includes the Gifts and Hospitality declaration form you need to complete to declare an interest. No <input type="checkbox"/> No further action required</p>	Employee's signature and Date:	

Once you and your manager have agreed this form, please send a copy to your senior manager (your manager's manager) and save an electronic copy on your local drive. There is no requirement to send the form to the People Function or MyHR helpdesk.