

## Performance Excellence Reviews

### Purpose of Performance Excellence Meetings

The annual performance review process plays a pivotal role in ensuring we deliver the Strata vision which is **to create an expert, resilient and sustainable IT service which supports day to day service delivery as well as the transformational aspirations of our customers.**

Performance Excellence Review meetings are vital so that individuals understand how their roles fit in to the delivery of the company's priorities and so that performance can be measured in a way that means our staff can reach their full potential.

Strata and its management team is committed to the principle of every member of staff having an annual review with their manager between April and June.

The time spent provides an opportunity for you to meet with your line manager to discuss what progress has been made during the previous 12 months towards achieving your agreed objectives and how you have performed in relation to the quality or standard of your work and the company's behaviours framework.

It is also a future focussed process - the majority of the meeting should focus on agreeing performance standards and objectives for the next 12 months and considering any training or development needs you may have.

Here is a [short guide to performance management](#) and our [behaviours framework](#).

This document will record the outcomes of your review and a plan for any future development.

### Setting Your Objectives

Objectives for the next 12 months will be agreed during the meeting. It is important that these objectives are **SMART** (Specific, Measurable, Achievable, Realistic and Time Bound).

Objectives must link with the Business Plan (we call this the 'golden thread' as it is vital that you understand clearly how you contribute to the strategic priorities of the company). We recommend between 5 and 10 objectives should be set, though this may vary depending on your post.

## Performance Excellence Review Form

<b>Name:</b>	<b>Team:</b>
<b>Job title:</b>	<b>Date of last review:</b>
<b>Date of this review:</b>	<b>Line manager:</b>

Achievement against annual objectives	Were objectives met – yes/no	Notes
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
9.		
10.		
<b>Overall assessment for achievement against objectives:</b> Level A = exceeded B = met C = underperforming		

Behaviours framework	Level (A= exceeded B = met C=under-performing)	Examples of behaviour that shows support level awarded
Simplicity in communication		

<b>Systems thinking and excellence in service delivery</b> (linked to our value of great services and great service; and innovative, always improving)		
<b>Trust and respect</b>		
<b>Accountability</b>		
<b>Working together</b>		
<b>Excellence in leadership</b>		

## REFLECT, REVIEW AND PLAN

### REFLECT

#### Achievements

Discuss their main achievements and improvements. Consider and summarise any important points here.

#### Wellbeing

What aspects of the work environment impact positively or negatively on their experience at work or wellbeing? Are there any health or other issues impacting performance? Consider together, summarise any important points here.

#### Challenges

What do they consider as the main challenges? Have they identified appropriate actions to take and improvements. Summarise any important points here.

#### Performance feedback

Discuss and consider whether regularity of 121s meets their needs. Summarise your discussion and note any actions.

### REVIEW

#### Job Description

Job descriptions should be reviewed annually.

**Job Evaluation**

Have there been changes to the type of work being undertaken? Does the role need to be job evaluated?

**Management**

What feedback do they have for you? What could you do to help them do their job more effectively?

**Aspirations**

Do they have specific career aspirations or goals? Discuss, consider and summaries what steps can be taken to help achieve these.

**PLAN**

**Setting new objectives**

Remembering the 'golden thread', what are the new objectives for the forthcoming review period?

Annual objectives – remember the 'golden thread' and SMART	Date for completion
1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

**Development of knowledge and skills**

Learning need/requirement	How achieved? (course, on-line, mentor, coach?)	Date for completion
1.		
2.		
3.		
4.		
5.		

**The future**

Are there any other comments or future actions which should be noted?

**Line manager's summary comments:**

**Signed:** ..... **Date:**.....

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**Employee additional comments:**

**Signed:** ..... **Date:** .....

**I agree that this represents what was discussed and agreed at my Review meeting.**

## DECLARATION OF INTERESTS / REGISTRATION OF GIFTS & HOSPITALITY

For use by Strata Staff, Strata Board Directors, Members on the JEC and Chief Executive's supporting the JEC

Please complete this form and return to:

Strata IT Director @

Name	
Service	
<p><b>DECLARATION OF INTEREST:</b>            Details / Nature of Relationship (eg: relationship to and nature of business including the business address and owner, or details of known customer)</p>	
<p><u>Interest to be reviewed at PER annually – please update with date of review below</u></p>	
<p><b>HOSPITALITY RECEIVED</b>            (Please include date, details of event and reason for accepting)</p>	
Signature	
Date of Declaration	
Strata IT Director's Signature	

For Office use;

This form once completed will be kept on an online register at Strata Solutions intranet