

Appraisal/Talent Conversation and Pay Progression Policy

W12

Additionally refer to:

- Development and Training Support
- Disciplinary Policy
- Employee Performance Management Policy
- Acting Up Policy
- Sponsorship of Healthcare Workers for Professional Registration Training
- Secondments Policy
- Equality, Diversity and Inclusion Policy

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V1	Jan 2016	Head of Education	Draft	New Policy to incorporate new policy format, incorporation of Trust Values, Pay Progression. This policy also amalgamates and updates policies HR10 and HR44 (Knowledge and Skills Framework) which are now obsolete
1.4	Nov 20	Mary Beales	Draft	Revised to incorporate new nationally agreed Agenda for Change Pay Progression arrangements.
1.5	May 2024	Chris Goulding	Draft	Streamlined the policy and clarified roles and responsibilities. Now aligned to the policy template and inserted a policy on a page summary. Bank staff are entitled to a talent conversation Updated to reflect new paperwork
2	March 2025	Diana Martin	Final	Revised the policy following feedback from Staff side to ensure there is a balance between Annual Review and Talent conversations.

Contents

	Page Number
1. Policy on a Page	4
2. Policy Statement	5
3. Scope	5
4. Roles and Responsibilities	6
5. Setting Annual Objectives	7
6. Appraisal/Talent Conversation Process	8
7. Record Keeping and Monitoring	8
8. Pay Progression Principles	8
9. Pay Progression Performance Criteria	9
10. Requesting a Review of a Pay Progression Decision	10
11. Training	10
12. Policy Review Process	10
13. Equality Impact Assessment	11
14. Process for Monitoring Compliance	11
15. References	11
Appendix A: My Appraisal/Talent Conversation Form	12
Appendix B: Appraisal/Talent Conversation Colleague Feedback Form	20

1. Policy On a Page

- Appraisal/Talent conversations are a key part of the Trust's retention programme and underpins the training and development of our employees. It recognises that all of our employees have talents and provides a supportive framework and approach to holding conversations in which employees can be supported and enabled to do excellent things.
- The Policy sets out the elements of a dedicated Employee led annual appraisal and Talent Conversation with their line manager, enabling individual performance.
- The Trust supports and acknowledges that some employees will not want the more in depth talent conversation and this is a clear option for all employees when undertaking their annual appraisal/talent conversation meeting. In both approaches employees may seek feedback from colleagues and the feedback form is found at Appendix B.
- Those employees who would like a more in depth talent conversation, the form includes a Talent grid in the resources section. The paperwork that supports this approach is at Appendix A.
- The outcome from the conversation is geared towards cultivating everyone's best potential to set personal goals and objectives for the forthcoming 12 months and to agree personal training and development needs for the employee to action. Encouraging employee's full engagement in this process it allows for individuals to receive feedback on their performance from their manager in a timely manner, aligning personal and team priorities. This allows the employee to focus on themselves and feel that their aspirations, talents, and skills are acknowledged and understood.
- Through this process, we will have improved visibility of our internal talent pipelines and talent pools that can then be shared at all levels across the Trust and the NHS system. It will enable stronger, more diverse progression into critical senior leadership roles and more opportunity to share talent between organisations thus retaining staff within the NHS.
- It is an opportunity to have an in-depth, rounded, person centred conversation that will help employees to maximise engagement in their role and future career, create personal learning and career development opportunities, and celebrate the talents of employees who are currently content in their role and do not want to progress.
- These conversations provide the space where employee's can discuss their strengths, future aspirations, contributions to the Trust wellbeing, EDI and potential flexible working arrangements.
- Successful and satisfactory completion of the appraisal/talent conversation will facilitate pay progression for the employee, not already at the top of their pay band.
- Line Managers and senior colleagues who carry out employee reviews, play a pivotal role in holding the conversation with their employees ensuring it is carried out, covering both performance and development and making sure that the discussion is recorded on ESR in a timely way.
- Managers are also responsible for ensuring that pay progression is applied consistently and fairly to all employees who they manage and decisions to allocate pay progression are based on objective evidence and in line with this policy.

2. Policy Statement

- 2.1 This Policy sets out the requirement for employees in the Trust to have an annual appraisal/talent conversation which is aligned with the Agenda for Change terms and conditions Handbook.
- 2.2 We aim to plan for a diverse and representative workforce at all levels, with a robust talent pool that supports collaborative working. We want to adopt a culture where health and wellbeing, equality diversity and inclusion and flexible working arrangements are the norm. By doing so, we will create an environment that retains top talent and fostering a sense of pride and fulfilment in our employees.
- 2.3 The appraisal/talent conversations are an important part of the Trust's retention programme to ensure all employees are provided with support to organise their workload in an efficient and effective manner. Providing the opportunity to identify, reflect on developmental opportunities, career aspirations and motivations and identify potential barriers to progression.
- 2.4 This policy is also aligned with the NHS "Our People Promise", to ensure opportunities for learning and development, and to provide support for every individual to reach their full potential. All employees, irrespective of band, technical expertise, profession, working arrangements or characteristics should have an annual appraisal/talent conversation that focuses on their potential and career, not just their performance, with regular updates throughout the year on progress made.
- 2.5 The Trust's approach is recognised as a two-way process, requiring equivalent dedication and focus from both manager and employee. The Trust supports and acknowledges that some employees will not want the more in depth talent conversation and are content in their own role, and this is a clear option for all employees when undertaking their annual appraisal/talent conversation meeting.
- 2.6 The line manager's role is to ensure that there are clear development offers in place and that the employee is supported to take ownership of their development, with a focus on building strengths and working on development areas linked to performance aligned to the Trust's key operational and strategic objectives. A successful appraisal/talent conversation requires preparation from both parties and use of the guidance available via the intranet, so that a meaningful conversation takes place.
- 2.7 Pay progression is linked to the successful completion of the annual appraisal/talent conversation process and line managers play a pivotal role in ensuring that the allocation of pay progression is applied consistently and fairly.
- 2.8 Appraisal/talent conversations are a key performance indicator for workforce performance and the target for the Trust as a whole is 90% compliance across all staff groups.

3. Scope

- 3.1 This policy applies to employees on Agenda for Change terms and conditions of employment, including Bank staff but does not apply to Medical and Dental staff who have their own annual review arrangements and does not apply to agency workers.
- 3.2 Eligible employees are required to have an appraisal/talent conversation at least once every 12 months. In some instances, more frequent or earlier appraisal/talent conversations will be required (such as prior to the end of a 6-month care certificate or with a new employee to set objectives). Evidence of these discussions should be recorded in the same way as an appraisal/talent conversation would be recorded.

4. Roles and Responsibilities

4.1 Trust Board

The Trust Board oversees all People policies and discharges its responsibility for this policy (via the Chief Executive Officer) to the Chief People Officer to ensure the policy is developed in line with good practice and properly implemented, and when needed amended to reflect changes in legislation.

4.2 Line Managers and Senior Colleagues who carry out staff Annual appraisal/talent conversations.

- Need to be familiar with the contents of this policy and ensure their employees understand the importance of annual appraisal/talent conversation and the link to pay progression.
- Are responsible for ensuring that every employee has a timely appraisal/talent conversation which supports effective conversations and work performance, and are given the option whether or not to have a more in depth talent conversation as the paper work in Appendix A makes clear.
- Must schedule and carry out reviews in line with this policy and both employees and managers must prepare for an appraisal/talent conversation which is properly recorded.
- Are responsible for ensuring that pay progression is applied consistently and fairly to all employees who they manage and decisions to allocate pay progression are based on objective evidence and in line with this policy.
- Should ensure that Bank staff who work regularly for them receive an annual appraisal/talent conversation. Managers should ensure that Bank staff who require a review for re-validation purposes take the necessary steps to make sure this happens.
- Better understand their employee's talent, aspirations, and skill sets, and a clear understanding of how they can support everyone on their specific career journey.
- Set an encouraging and compassionate manner for the conversation, emphasising that all feedback is appreciated.
- Encourage open and honest discussion, actively listening to the employee's thoughts, ideas, and concerns.
- Discuss the employee's current performance and skills in relation to their role.
- Provide constructive feedback, emphasising strengths and areas for improvement and should encourage the employee to reflect on their own performance and skills, self-assessing where they see themselves on the talent grid (HR Policy and Guidance: [SaTH Intranet - HR Policies](#))
- Encourage employees to discuss their ambitions, both within their current role and beyond, working collaboratively to identify developmental opportunities that align with the employee's aspirations and the organisation's needs.
- Help the employee set clear and measurable goals that will contribute to their development, ensuring the goals are specific, measurable, achievable, relevant, and timebound (SMART).
- Discuss the support and resources available to help the employee achieve their goals.
- Regularly check with their employee to discuss progress in meeting the agreed set of goals and whether further support is needed.
- Offer an opportunity to have a further career conversation during the year, should the employee wish to have a further in depth conversation. It may be useful using various tools available such as the "scope 4 growth model" (HR Policy and Guidance: [SaTH Intranet - HR Policies](#)). Appraisal/talent conversation form makes clear that whilst this is an annual submission, employees and managers should be discussing how the employee is progressing throughout the year, Career and Scope for Growth discussions can be requested at any time.

4.3 Employees

- Need to be familiar with the contents of this policy, and ensure they understand the importance of an appraisal/talent conversation, and its links with pay progression where appropriate.

- Employees should also review their own performance over the last 12 months against the objectives set with their manager. They should also review their training and development activities undertaken over the last 12 months in terms of the impact on performance in readiness to discuss at the meeting with their line manager.
- Bank staff who work regularly for the Trust are entitled to an annual appraisal/talent conversation and should arrange this with their line manager, Senior Colleague or Ward manager.
- Bank staff should prepare in advance of the appraisal/talent conversation using the opportunity to take control of their own development and career by expanding and strengthening their skills in their current role, as well as being fully supported towards the next step of their career.
- Bank staff who require a review for re-validation purposes should also arrange this with their line manager or a Senior Colleague or Ward manager.
- Should reflect on their career aspirations and development goals before the conversation, considering their strengths, areas for improvement, and any challenges they may be facing.
- Should approach their line manager to request an appraisal/ talent conversation (if one hasn't already been arranged).
- Should engage in the conversation and be open to their managers insight and guidance.
- Should put thought into their current health and wellbeing, how they look after their own wellbeing and be prepared to discuss this at the meeting.
- Should articulate what motivates them and how they meet the Trusts Values.
- Should reflect on their strengths and development challenges.
- Should reflect on their performance and skills in relation to their role and the organisation's expectations.
- Should identify what EDI objectives should be part of their annual goals.
- Should collaborate with their line manager to set clear and measurable goals that contribute to their development, ensure the goals are specific, measurable, achievable, realistic and timebound (SMART) and how achieving these goals will help them progress in their career and benefit the organisation.
- Should request a further career development conversation during the year should they wish to do so.
- Can request at any time to have a Talent, Career or Scope for Growth Conversation. Appraisal/talent conversation form makes clear that this is not just an annual event, should an employee wish to raise something which is related to their career they should raise this with their manager.
- Should review their Statutory and Mandatory training compliance and if there are subject areas which they need to complete, they should come prepared to discuss those plans in their appraisal/talent conversation .

4.4 Chief People Officer

The Chief People Officer has overall responsibility for this policy:

- providing support and guidance to employees and managers on the implementation of this policy.
- monitoring the application of this policy across the Trust and updating it as required.
- reporting monthly on compliance rates to Trust Board and other Committees.

5. Setting Annual Objectives

- 5.1 In accordance with the Trust Performance Management Framework, every employee should agree annual work objectives with their line manager which should be aligned with the Trust's values.

- 5.2 The annual appraisal/talent conversation for employees in scope of this policy, should aim to take place between May – August each year. This is consistent with the advice given to Senior Leaders. Managers unable to carry out the appraisal/talent conversation in this period, should consult with their line manager and agree a revised timeline for the review to be completed. It is advisable that this is no longer than one month either side of the Trust's target (May – August). Line managers should ensure that they communicate the revised timeline with their member of staff and plan a date in the diary.
- 5.3 These dates may be outside the date when an employee's increment is due for review. Managers are advised to carry out the appraisal/talent conversation in the above timeframe and action the incremental increase (subject to satisfactory performance) on the due date.

6. Appraisal/talent Conversation Process

- 6.1 The following should be recorded on the relevant form:
- Employee's aspirations and meeting their objectives for the preceding 12 months.
 - How the employee has demonstrated the Trust's Values in their work.
 - How the employee has met Equality, Diversity and Inclusion objectives. This is also a specific requirement for Band 7's and above.
 - An overall rating of the employee's performance and the impact on the employee's pay progression.
 - Outcomes from education, learning and developmental activities that were undertaken during the preceding 12 months. This includes an employee's statutory/mandatory training compliance as this will form part of the criteria for pay progression purposes.

7. Record Keeping and Monitoring

- 7.1 The Employee-Led Appraisal/Talent Conversation Record must be completed and signed by the employee and the line manager.
- 7.2 In addition, a copy of the Electronic Record of appraisal/talent conversation and Pay Progression Outcomes notification form should be completed online and retained on the employee's personal file. If this not done then they will be recorded as non-compliant.
- 7.3 Compliance is monitored monthly and reported to JNCC via the Workforce dashboard report and to the Trust Board. Each Department will also monitor compliance and are expected to deliver month on month completion rates in order to contribute to the overall Trust target.

8. Pay Progression Principles

- 8.1 The Trust expects all employees to demonstrate appropriate levels of performance which will be monitored through appraisal/talent conversation. The process should aim to be a positive and a constructive experience and there should be no surprises at the meeting. If line managers or senior colleagues who undertake the appraisal/talent conversation, are unlikely to agree that the employee receives pay progression, this will have been communicated in advance of the appraisal/talent conversation (preferably several months ahead) to a) enable the employee to improve and b) to ensure there is no misunderstanding.
- 8.2 Pay progression is not an automatic right and where pay progression is withheld or delayed, employees will have the right to request a review of the decision.
- 8.3 Employees on the top of their band will not be able to access Pay Progression. They will still be expected to undertake an appraisal/talent conversation, and this must be recorded on the Electronic Record Form and Pay Progression Outcomes notification form.

9. Pay Progression Performance Criteria

- 9.1 The Trust has defined appropriate levels of performance that count towards awarding pay progression as follows:
- Completion of an appraisal/talent conversation within 12 months of the previous review.
 - Satisfactory achievement of work objectives carried out during the year.
 - Up to date compliance with Statutory Mandatory training requirements.
 - Not being subject to a live formal disciplinary sanction.
 - Demonstration of Trust Values in day to day work.
 - Development plan actioned. However, if there are mitigating circumstances which did not enable the employee to complete their development plan (i.e. service pressures) this must be properly factored into the decision to allocate pay progression.
- 9.2 Line managers are responsible for allocating pay progression to those employees who meet the above criteria.
- 9.3 Pay progression payment may be delayed if the employee is being managed under the formal stages of the Employee Performance Management Policy (W10) at the time of the meeting.
- 9.4 Where pay progression is delayed it will become payable on successful conclusion of the formal Performance Improvement Plan (PIP) so long as all the other criteria at 8.1 above are also met. Pay progression will become payable from the date the manager and employee sign off the formal PIP and hence it will not be back dated. The line manager will need to notify Payroll Services accordingly.
- 9.5 Pay progression will not be unreasonably withheld when the employee has been unable to meet the performance requirements. For example, the line manager fails to meet with their employee to hold their Appraisal/talent conversation or does not release the employee to complete their Statutory/ Mandatory training, through no fault of the employee.
- 9.6 Notwithstanding the criteria in 8.1, if an employee is due an appraisal/talent conversation and potentially pay progression but is subject to a formal disciplinary sanction under the Trust Disciplinary Policy, the panel will need to assess whether pay progression is awarded or not. One indicator will be whether the warning is related to an individual's work performance. The chair of the disciplinary panel will formally confirm their decision in the outcome letter to the employee. If the panel determine that an employee should not receive pay progression as a result of receiving a disciplinary warning, they will need to specify in the outcome letter how long an employee will not be eligible for consideration of pay progression particularly if a formal sanction is longer than 12 months.
- 9.7 Employees that have failed to meet the performance criteria for reasons of long-term sickness or paternity/maternity absence will not have their pay progression unreasonably withheld, so long as they are not subject to any formal performance sanctions under Trust Policies.
- 9.8 In accordance with the Trust Policy on Verification of Professional Registration, it is the responsibility of every employee required to be registered with a regulatory body to ensure that they maintain their registration. Failure to maintain registration within a review period, (requirement to practice in a profession) is likely to result in withholding pay progression for that period. This is in addition to any other appropriate proceedings or consequences.
- 9.9 The Electronic Record of appraisal/talent Conversation and Pay Progression outcomes notification form, must be completed and submitted every year, regardless of whether the employee is eligible for a pay progression award or not.

- 9.10 Where pay progression is withheld, it is the responsibility of the line manager to notify the employee in writing of the reasons for this, based on the criteria in 8.1, and provide the employee with the right to appeal the decision via the grievance policy (see section 9). Line managers must state in writing when the employee will next be eligible for consideration for pay progression. Line managers must also update ESR accordingly using the Electronic Record Form and Pay Progression Outcomes notification form.
- 9.11 Employees on Bands 8C, 8D and 9: Agenda for Change terms and conditions Handbook applies: The year after an employee has reached the top of bands 8c, 8d or 9, 5 per cent or 10 per cent of basic salary will become re-earnable. This means that where the criteria of this Policy are met, salary is retained at the top of the band. If the criteria are not met, salary may be reduced by 5 per cent or 10 percent from the pay progression date. The employee will be able to restore their salary to the top of the band at the end of the following year by meeting the required standards.

10. Requesting a Review of a Pay Progression Decision

- 10.1 If an employee is subject to a pay progression award being withheld or delayed and they feel this is unreasonable and not in accordance with the stated criteria, the employee has the right to refer the matter for consideration by the next level of management using Stage 2 of the Grievance Policy as they would be challenging a management decision.
- 10.2 Employees must put in writing to their line manager, the reasons for appealing the decision within 10 days of receiving the notification that their pay progression has been withheld or delayed. They can request that this is reviewed by the line manager's manager or an independent manager. (Please refer to the Grievance Policy). Representation is also set out in the Grievance policy which confirms that employees' can invite their Trade Union or Professional Organisation representative or work colleague to attend any meetings arranged under the Grievance policy and procedure.

11. Training

- 11.1 Statutory mandatory training is part of the criteria of assessing whether an employee will be awarded pay progression.
- 11.2 Attendance at appraisal/talent conversation training sessions for managers is recommended to ensure they fairly apply this policy and to assist in their conversational skills. As a minimum, managers are expected to have read this policy and the guidance available to managers on the HR Policy and Guidance intranet page: [SaTH Intranet - HR Policies](#).
- 11.3 Managers need to prepare for the annual appraisal/talent conversation with their employee by reviewing their work objectives and performance over the last 12 months, checking statutory and mandatory training compliance and reviewing the employee's training and development plan. See section 3.
- 11.4 Supporting materials are also available in written and audio-visual formats via the intranet.

12. Policy Review Process

- 12.1 This policy will be reviewed if there are any changes to national terms and conditions, and in 3 years' time.
- 12.2 In order that this document remains current, any of the appendices to the policy can be amended and approved during the lifetime of the document without the policy having to return to the ratifying committee.

13. Equality Impact Assessment (EQIA)

- 13.1 This policy applies to all employees equally and does not discriminate positively or negatively between the protective characteristics.

14. Process for Monitoring Compliance

- 14.1 Appraisal/talent conversation is a key performance indicator for workforce performance. The monitoring of this policy includes reporting compliance rates to Trust Board and forms part of the monthly dashboard report to JNCC and other Committees.

Aspect of compliance or effectiveness being monitored	Monitoring method	Responsibility for monitoring	Frequency of monitoring	Group or Committee that will review the findings and monitor completion of any resulting action plan
Appraisal/talent conversation	Monthly reporting system	Corporate Education to produce report, management to ensure compliance	Monthly	Appraisal/talent conversation stats are reported to the Trust Board.

14. References

- Agenda for Change terms and conditions handbook.
- Agenda for Change terms and conditions handbook: Annex 23 pay progression
- Appraisal/Talent Conversation proformas and guidance for managers and employees - intranet ((HR Policy and Guidance: [SaTH Intranet - HR Policies](#))

Appendix A: My Appraisal / Talent Conversation Form

Your appraisal/talent conversation is your protected time with your manager or appraiser. This is time to discuss your job role and achievements. You can review what support and development you may need. The form has the appraisal/talent conversation meeting in mind. It is written in a way to help the conversation flow.

Your appraisal/talent conversation and Talent Conversation forms part of your ongoing conversations with your manager. If you need to raise something, do not wait for your yearly date. Speak to your manager in your regular meetings. This can be one to ones, quarterly reviews, or arrange an appointment to see them.

This form is for all staff except medical or GMC registered staff. They have their own separate process and documents. You and your manager must fill out this form after reading the guidance document.

Your Name		Line Manager / Appraiser	
Your Job Title and Band		Line Manager / Appraiser Job Title	
Your ESR Number			
Date of Review		Date of Last Review	
Your Next Pay Step Date (if within 12 months please complete Pay Progression Paperwork)		Are you top of your Band?	
Job Description up to date?	Yes / No Action Required:		

What would you like to discuss at your Appraisal / Talent Conversation?

- 💡 *What would help you to improve how you do your job?*
- 💡 *To agree clear objectives for my work*
- 💡 *To learn about the value I add to the organisation*
- 💡 *Resources and [guidance](#) if you wish to have a full 'Talent Conversation' using the Talent Grid are available [here](#).*

Your Health and Wellbeing and Flexible Working

This is space for you to talk about your health and wellbeing.

- 💡 Details about the Trust Health and Wellbeing Offer is on the Intranet [here](#)
- 💡 The national Health and Wellbeing toolkit is available [here](#)
- 💡 Information on Flexible Working within the Trust can be found [here](#)

You may like to talk about...

- 💡 How your wellbeing impacts you at work. This could include caring responsibilities, health conditions or personal circumstances.
- 💡 What is a good day and a bad day? Discuss any existing or required reasonable adjustments / flexible working
- 💡 Is there any information you can share with your team to support your health and wellbeing?

Statutory and Mandatory Training

Are you fully up to date with your mandatory training?

Yes/No

- 💡 You can see your training requirements at Learning Made Simple [here](#).

Items outstanding and plans to make sure you do them

- 💡 List the courses that are now out of date. When and how you will make time to do them?

- 💡 List below any additional courses or Continuous Professional Development you have undertaken in the last 12 months

Your Role: Meeting Objectives and Showing Trust Values

What has gone well in the last 12 months (please review objectives from your last conversation)

- 💡 *What is your proudest moment from the last 12 months?*
- 💡 *Have you had a opportunities to make improvements in the areas that you work?*
- 💡 *Which [Trust Values](#) or [Trust Behaviours](#) have you shown?*
- 💡 *Click here to view our [Talent Conversation Coaching Questions](#) which may support this conversation.*

What has gone less well in the last 12 months (please review objectives from your last conversation)

Summary of relevant feedback from manager

To include colleague feedback (using form below) and feedback the employee has received.

- 💡 *The Colleague Feedback Form can be found [here](#) (this is optional)*

What would you like to achieve? What *opportunities do you have to make improvements in the areas that you work?*

💡 Click [here](#) to find out how the Improvement Hub can help you make improvements where you work

Thinking about the future, what are your career goals or plans? If you want to discuss this further please use the links below:

💡 Click [here](#) to discuss your talent, performance and readiness to move into a different role using the **Talent Grid**

💡 Click [here](#) to create an Aspirational Development Plan using the **Scope for Growth** model. Supporting guidance is available [here](#) and a video is available [here](#)

💡 Many resources on **Career Conversations** can be found on the [SaTH Talent Portal](#)

Equality, Diversity and Inclusion (EDI) (for more information on EDI at SaTH click [here](#))

💡 Write about how you act as a role model in your own behaviour. How do you help the organisation to achieve a culture that is inclusive and equal?

💡 Do you feel included and respected as a member of the Trust and your team?

💡 What could we do to improve your experience?

Your Objectives and Development

Your objectives for this year. You should agree your objectives with your manager.

💡 Please consider how your objectives will help the organisation's objectives & operational plan.

💡 For more on how to set SMART objectives please see a bite size video from the SaTH Improvement Hub [here](#).

💡 All Band 7 and above roles must have an Equality, Diversity and Inclusion (EDI) objective. However, we encourage all colleagues to have an objective relating to EDI. For more information on EDI objectives, click [here](#).

Objective inc. date to be achieved	How will this objective be achieved?	Review meeting notes for completion at 6 and 12 month review meetings

What development do you need over the next twelve months to help you achieve your objectives? What will support your career progression and personal development?

💡 All staff should have the chance to develop their career. You should be able to improve your knowledge and skills. You should have access to the right learning opportunities.

💡 For details on the Education and Development offer click [here](#).

💡 For details on the SaTH Leadership Development framework offer click [here](#)

Development	When will it be completed	Review meeting notes for completion at 6 and 12 month review meetings

Record Review and Outcomes - *to be completed by the appraiser/line manager online [here](#)*

This section is linked to pay progression (see the Appraisal/Talent Conversation and Pay Progression Policy and Procedure for more information [here](#)).

To progress to the next pay step employees must meet the following criteria:

a) Completion of a recorded appraisal/talent conversation within 12 months of previous appraisal (within post holder's ability)?	<input type="checkbox"/>
b) Compliance with Statutory Safety Update training requirements (unless outside of employees control)	<input type="checkbox"/>
c) Satisfactory performance? Answer 'Yes' if no relevant live formal disciplinary sanction (policy section 7.5) or formal performance management (policy sections 7.2 and 7.3)	<input type="checkbox"/>
d) Demonstration of Trust Values in day to day work?	<input type="checkbox"/>
e) Achievement of objectives identified at previous review (within post holder's ability)?	<input type="checkbox"/>
f) Increment Awarded or, if on top of band, performance fully satisfactory? If 'No', Manager to notify Payroll on ESR Change of Circumstances form (unless staff member is at top of Bands 1-8b) and consider action under the Employee Performance Management Policy (W10) if appropriate	Not Set
g) Personal Development Plan Agreed?	<input type="checkbox"/>
h) Did you meet the objective set at the front of the documentation to make this a meaningful / useful appraisal discussion?	<input type="checkbox"/>

Employee Signature	
Line Manager / Appraiser Signature	

Resources Page

Talent Conversation: Resources and [guidance](#) if you wish to have a full 'Talent Conversation' using the Talent Grid are available [here](#).

Health & Wellbeing Resources: Details about the Trust Health and Wellbeing Offer is on the Intranet [here](#). The national Health and Wellbeing toolkit is available [here](#). Information on Flexible Working within the Trust can be found [here](#).

Learning Made Simple: To check your training requirements and see courses on offer -

[SaTH Intranet - Learning Made Simple](#)

Trust Values: For information on the Trust Values click [here](#)

Trust Behaviours: For information on the Trust Behaviours click [here](#)

Coaching Questions: For Coaching Conversations to help this conversation, please click [here](#)

SaTH Improvement Hub: This provides links to resources including Improvement Models, bitesize videos and available Improvement Training. See [SaTH Intranet - Improvement Hub](#)

Scope for Growth Model: Click [here](#) to create an Aspirational Development Plan using the **Scope for Growth** model. Supporting guidance is available [here](#) and a video is available [here](#)

SaTH Talent Portal: Many resources on **Career Conversations** can be found on the [SaTH Talent Portal](#)

Equality, Diversity & Inclusion Resource: We commit to promoting equality, diversity and human rights. We want to remove unlawful discrimination in-line with the Equality Act 2010. The EDI section includes information on our Staff Equality Networks and our Equality and Diversity Calendar. [SaTH Intranet - Equality, Diversity and Inclusion](#)

SaTH Education Prospectus: For details on the Education and Development offer at SaTH click [here](#).

HR Resources: This includes information on:

Flexible working (including home working)

Taking time off work

Work life balance

Occupational health

Pay

Performance improvement

Employee relations.

[SaTH Intranet - Human Resources Home](#)

Leadership Development Resources: You can see details of our Leadership development offer. This includes our Leadership Masterclass calendar, access to SDI assessment and Healthcare 360 Leadership. You can also see development available through the National Leadership Academy. [SaTH Intranet - Leadership & Development](#)

Apprenticeships: These are for all employees and bank staff, both clinical and non-clinical. They are an excellent way to develop and learn new skills. More information can be found on the Intranet [SaTH Intranet - Apprenticeships](#)

More Coaching Support: Coaching can support you to develop new skills. It will help you to find solutions to problems you may face. For example, if you are not getting the results you want at work, a coach may encourage you to understand the situation more clearly. They can help you to develop new ideas or approaches for such situations and take action that gets you the results you want. More information can be found on our Coaching Intranet page: [Coaching Home Page.pdf \(sath.nhs.uk\)](#)

Appendix B: Appraisal / Talent Conversation Colleague Feedback Form

The Appraisal / Talent Conversation Colleague Feedback Form can be used to gather wider feedback on an employee's behaviour and help identify areas that require support to improve on and give positive feedback where required. It should be undertaken around the time of the employees appraisal / talent conversation.

The form can be sent electronically or by post and should be returned to the individual's Line Manager or Appraiser. It does not have to go back to the appraisee as this could break confidentiality.

The questionnaire should be sent out by the appraisee to no more than 5 colleagues that the person works with. These include:

Employees who are in a higher position that they work alongside – i.e. manager, or work colleague of a higher banding.

- Employees who they work alongside at the same level – i.e. someone in their department at the same grade.
- Employees who they work alongside at a lower level – i.e. person who reports into them, or work colleague of a lower banding.
- Other employees that they have worked with – i.e. anyone outside of their department with which they have worked.

If the appraisee is unable to request feedback from an above area i.e. unable to find anyone of a lower banding to give feedback, then more colleagues from the other areas can be asked.

Once the colleague has completed this document, they are to return it via email or post to the line manager / appraiser, who will collate all the feedback received and will discuss with the appraisee during the appraisal / talent conversation.

What does your colleague do well?

💡 How do they show Partnering, Ambitious, Caring and Trusted behaviours and qualities in the team and with others?

What could your colleague further develop to be even better?

💡 What would you like to see more of?