

Appraisal & Knowledge Skills Framework (KSF) Development Review Documentation

Preparing for your Appraisal & KSF Development Review

The Appraisal & KSF Development Review aims to discuss the competencies, skills and knowledge you need to have and demonstrate in your post, your training and learning needs in relation to meeting these, and possible career aspirations. It is a chance to look at your role and your work load, to look back on what you have achieved during the year and to agree what you need to achieve in the next year and beyond.

It is recommended that the questions in page 3 of this document are considered prior to your review and used as the basis for discussion in your review meeting. Your reviewer will record a summary of your discussion and agreed actions/objectives for your personal file and future reference and ask you to sign to confirm this. You will also receive a copy for your own record.

Other documents you may need to refer to in order to prepare adequately for the review include the following:

- *Appraisal Gateway Policy & Guidelines (Reviewer Guidelines)*
- *Previous Review documentation & Personal Development Plan*
- *Job description & KSF Outline*
- *Evidence of progress & achievement*
- *Evidence of Clinical Supervision*
- *Learning records & Reflective journals (reviewee)*
- *Mandatory training guidelines/records*
- *Trust Strategy*
- *Directorate/Service Delivery Plan & Performance Management Action Plan*

Use this page as a record of invitation for the employee to attend his/her review. Ensure a completed copy of all documentation is placed on employee's personal file and that the individual receives a copy within 2 weeks of the review taking place.

The Request for a KSF Development Review Meeting has come from:

Reviewer Name:

Reviewer Contact Details:

This request is directed to:

Reviewee Name:

The details of the requested meeting are:

Date:

Venue:

Time:

Employee's Name:

1. Items for Discussion at the Review Meeting

Note to Reviewer & Reviewee

Please use this form as the basis for your preparation and discussion.

Record brief details from the discussion under each heading

1. How (if at all) has the job changed during the last 12 months & is the job description up to date?
2. What have been the key successes or achievements over the last 12 months?
3. Are there any significant challenges in carrying out the role or changes that could be made to help to improve performance and/or benefit patients/clients/colleagues?
4. To what extent have objectives agreed at the last review been achieved and what has been learned from these? (This should be recorded under the evaluation column on last year's objective setting form).
5. What learning and development has been undertaken during the period under review and how has this been used in practice? (This should be recorded on the status/evaluation column of the PDP page from last year)
6. What progress has been made towards requirements of KSF outline for the post?
(Record progress and evidence of achievement in section 2 – Progress Towards Achievement of KSF Outline)
7. Are there any organisational objectives or service changes that are likely to impact on the role over the next 12 months? (refer to the Trust objectives as well as those within the Department/Team)
8. What are the key priorities and service related objectives for the next 12 months?
(Record details on Objective Setting Form)
9. What development is needed over the next 12 months to help achieve requirements of the KSF outline for the post, achieve service objectives or support career development – and how might these be met? **(Record details on Personal Development Plan)**

IS MANDATORY TRAINING UP TO DATE? YES/NO

Employee's signature:

Reviewers signature:

Copy for individual and original for personal file.

Date:

2. Progress Towards Achievement of KSF Outline

You will need to refer to the KSF outline for the post to complete this section. Set form up as a template to mirror KSF outline prior to review meeting use to record progress against KSF requirements.

| KSF CORE Dimensions | Level Required | Indicators Only list those indicators still to achieve | | | | | | | | | | Level Fully Met? Yes/No | |
|--|----------------|---|--|--|--|--|--|--|--|--|--|----------------------------|--|
| C1 - Communication | 4 | | | | | | | | | | | | |
| C2 - Personal & People Dev. | 3 | | | | | | | | | | | | |
| C3 - Health & Safety | 3 | | | | | | | | | | | | |
| C4 - Service Improvement | 2 | | | | | | | | | | | | |
| C5 - Quality | 3 | | | | | | | | | | | | |
| C6 - Equality & Diversity | 2 | | | | | | | | | | | | |
| KSF Specific Dimensions (list all required) | | | | | | | | | | | | | |
| HWB2 - Assessment and Care Planning to meet health and wellbeing needs | 4 | | | | | | | | | | | | |
| HWB4 - Enablement to address health and wellbeing needs | 4 | | | | | | | | | | | | |
| HWB6 – Assessment and Treatment Planning | 2 | | | | | | | | | | | | |
| HWB7 – Interventions and Treatments | 3 | | | | | | | | | | | | |
| G6 – People Management | 2 | | | | | | | | | | | | |

Evidence/Comments

Use this space to provide a summary of progress including examples/evidence of achievement over the previous 12 months. Any key areas for development should be noted here and addressed through the Personal Development Plan. (Continue on a separate page if necessary)

Employee's signature:

Reviewers signature:

Copy for individual and original for personal file

Date:

3. OBJECTIVE SETTING – Service/Work Related

This form should be used, where appropriate, to record service/work related objectives to be delivered in the next 12 months.

| Objective/s | Success Criteria | Date for Review/ Complete | Evaluation of Implementation/ Progress (record progress at interim meetings) |
|---|------------------|---------------------------|---|
| C1/4 - Communication Develop and maintain communication with people about difficult matters and/or in difficult situations. | | | |
| C2/3 - Personal & People Development Develop ones self and contribute to the development of others. | | | |
| C3/3 - Health, Safety & Security Promote monitor and maintain best practise in health, safety and security. | | | |
| C4/2 - Service Improvement Contribute to the improvement of services. | | | |
| C5/3 – Quality Contribute to improving quality. | | | |
| C6/2 - Equality, Diversity & Rights Support equality and value diversity. | | | |

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|---|--|--|--|
| <p>HWB2/4 - Assessment and Care Planning to meet health and wellbeing needs Assess complex health and wellbeing needs and develop, monitor and review care plans to meet specific needs.</p> | | | |
| <p>HWB4/4 - Enablement to address health and wellbeing needs Empower people to realise and maintain their potential in relation to health and wellbeing.</p> | | | |
| <p>HWB6/2 – Assessment and Treatment Planning Contribute to the assessment of physiological and/or psychological functioning.</p> | | | |
| <p>HWB7/3 – Interventions and Treatments Plan, deliver and evaluate interventions and/or treatments.</p> | | | |
| <p>G6/2 – People Management Plan, allocate and supervise the work of a team.</p> | | | |

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|----------------------|---------------------|----------------------|
| Annual Review Date: | Employee Signature: | Reviewers Signature: |
| Interim Review Date: | Employee Signature: | Reviewers Signature: |

4. PERSONAL DEVELOPMENT PLAN

This form should be used to record personal development and learning objectives to be achieved in the next 12 months.

* please refer to Learning, Development & Study Leave Approval Policy for definitions

| Learning Objective/s/Purpose <small>(what is the purpose of the learning? Is it due to a gap in knowledge or a new process/system that the staff member needs to become competent in?)</small> | KSF Dimension & Level <small>(Which KSF dimension and level does the learning link to?)</small> | Course/ Learning Method <small>(how will the learning be achieved? What type of learning method will be employed – shadowing, reading, researching, learning on the job, course completion??)</small> | Priority* <small>Essential, Desirable 1 or Desirable 2</small> | Date for Review/ Complete <small>(this date MUST be set)</small> | Status & Evaluation of Progress <small>(record progress at interim meetings)</small> |
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