



# Performance Excellence

## Getting the best out of your review

### Colleague's Guide

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# Introduction

Good performance management really helps you get the best out of your working day and deliver great results.

Having regular honest conversations with your manager will really make the difference. Your manager is there to support and help develop you so if you feel you aren't getting enough face to face time then let them know!



"Just measuring your job performance..."

*Remember performance is not measured by the amount of paperwork you complete!*

This guide is a key document to support you through your Performance Excellence journey, giving practical guidelines on what you need to do.

We have made some enhancements. We have:

1. Provided a **conversation framework** to enable you and your manager to agree performance expectations at the start of the year.
2. Simplified the tools to enable you and your manager to focus on what really matters - having **great conversations**.

## Why it's important....



# Performance Excellence in Practice

Our business strategy will be delivered through the talent and capability of our people so we need every individual to understand what is expected of them, how they are performing, what development they need and deal with any performance issues in a timely manner.

We do this by providing on-going reviews & support, real time feedback and coaching.

Performance Excellence is **90%** great conversations; **10%** tools, processes and forms.



The only formal part of this process is the **agreeing expectations** conversation at the start of the year and the **review conversation** at the end of the year - these should be documented.

*Great performance management is however about the informal conversations that take place between **you** and **your manager** each and every day.*

# Preparing for the year ahead

Before meeting with your manager to discuss and agree your objectives/expectations for the forthcoming year, it's a good idea to review the previous year's performance against the objectives/expectations you set and think about what you want and need to achieve in the year ahead.

## Things to think about:

How did I do last year, what could I do better, what could I do more of?



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What I delivered but also how I delivered my objectives/expectations, what competencies/behaviours did I demonstrate?

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What feedback have I received and do I need to do anything about it?

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What development areas do I have and how could I improve those? *Remember "Development is 20% coaching, 70% on the job and 10% formal courses!"*

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What do I want to achieve during the year ahead?

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# Preparing for the year ahead



What additional projects/work do I want to get involved in and why?

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What am I good at, how can I build on this?

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What are my aspirations and what do I need to do to get there?

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What support do I need from my manager and what does that look like?

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During the meeting you will **discuss** and **jointly agree** your objectives or expectations and development actions for the year ahead. You may find it useful to take a first draft of your form to the meeting as a basis for this discussion and update it following the meeting with the agreed items. See appendices for how to write a [smart objective](#).

We have created a [simple form](#) to record the conversation - however you can record the conversation in any format that works for you and your manager. It's all about having a **great conversation** - not filling out a form!

# Which Form Should I use?

We have introduced new simple form options. On the following pages we explain how you should complete each section.

## Non-clinical

If you are a non-clinical Leader you should use the **Leader Form** which includes 'Our Leader Behaviours'. For guidance a leader is anyone who manages someone.



If you are a colleague and don't manage people you can either use a similar form to the Leaders one, the **Colleague Form** or a simpler version for roles where there are lots of people performing the same job. Both include 'Our Team Behaviours'.

The **My Performance** form enables you and your manager to identify key expectations or tasks rather than individual objectives, though these can be included if required. For some roles these forms have been pre-populated\* for your ease.



## Clinical

If you are part of our clinical teams (usually this is anyone in a role which requires a professional registration to be maintained in order to be able to carry out their job) in Hospitals you should use the **Hospital Clinical Form**. If you are part of the Occupational Health Team you should use the **Occupational Health Clinical Form**. These include 'Our Leader or Team Behaviours' but also covers the professional codes of conduct relevant to the role and allows the opportunity to review compliance against this.



There isn't a specific **Clinical My Performance** form option.

*Use the form that best fits you and your team member's needs and remember it's the conversation which is the most important part of the process.*

\* All Wellbeing Advisors, Life Guard, Reception in Corporate and Consumer. Sales, F&B, H&B and Nursery in Consumer. Housekeeper in Hospitals, Consumer & Corporate.

# Leaders & Colleagues Form

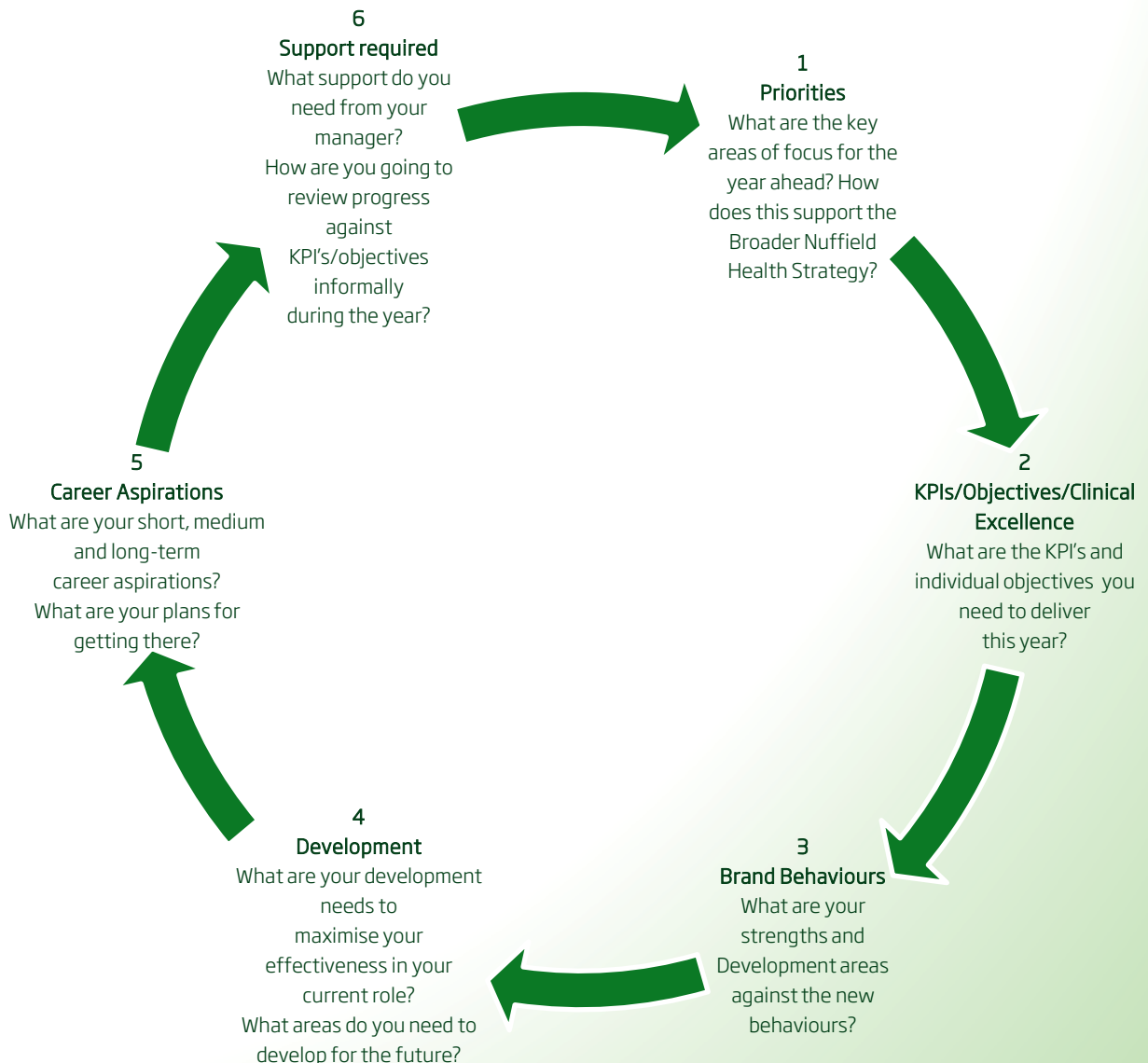
## Clinical & Non-clinical



At the start of the year, you will have a conversation with your manager in which you agree expectations for the coming year. This is your opportunity to ensure you know what you need to focus on – both in terms of the ‘what’ (KPI’s/objectives/expectations) and the ‘how’ (behaviours/competencies).

It’s also an opportunity for you and your manager to discuss development needs, career aspirations and how you are going to work together during the year.

## Conversation Framework - Looking forward (Expectations)



# Conversation Framework

## - Looking back (Review)

Whilst a half year review is not part of the formal process we would actively encourage you to have a review part way through the year with your manager to ensure all objectives/expectations are on track and are still appropriate.

At the end of year you will then sit down and have a conversation about how you have performed against each area and be given a final performance rating (see below). If you have examples and feedback on how you have performed you should bring these to the meeting as well.

- How have you performed against each KPI/Objective/Expectations, was each one achieved, not achieved or did you exceed expectations?
- What specific challenges, if any, did you have in meeting your objectives/expectations?
- How did you achieve them, were they delivered in line with the Brand Behaviours? (see appendices)
- In relation to the [Brand Behaviours](#), what are your strengths and what areas do you need to focus on improving next year?
- How did you perform against your development plan?
- Looking back on your performance how did you perform overall?

## Performance Ratings

Top Performer	OUTSTANDING OVERALL performance in all areas relative to peers, making a significant impact to Nuffield Health. Individual has gone way above what is required in everything they do.
Strong Performer	A STRONG OVERALL performance by an individual relative to peers who makes a valuable contribution to Nuffield Health. The individual has delivered everything that is required of them to a high standard, outperforming in some areas.
Good Performer	An overall performance by the individual which is GOOD relative to peers. They have done everything that is expected of them and made considerable efforts to achieve what is required.
Under/Inconsistent Performer	UNACCEPTABLE overall performance relative to peers, struggling to perform in current role and there are significant gaps in their ability to achieve satisfactory performance at this level. Performance can be inconsistent.

Overall Rating for KPIs/Objectives	Top Performer	Under/Inconsistent Performer or Good Performer	Good or Strong Performer	Strong or Top Performer	Top Performer
	Strong Performer	Under/Inconsistent Performer or Good Performer	Good or Strong Performer	Strong Performer	Strong or Top Performer
	Good Performer	Under/Inconsistent Performer or Good Performer	Good Performer	Good or Strong Performer	Good or Strong Performer
	Under/Inconsistent Performer	Under/Inconsistent Performer	Under/Inconsistent Performer or Good Performer	Under/Inconsistent Performer or Good Performer	Under/Inconsistent Performer or Good Performer
	Under/Inconsistent Performer	Under/Inconsistent Performer	Good Performer	Strong Performer	Top Performer
		Overall Rating for Behaviours			

Your manager will take into account **how** you have delivered using the [brand behaviours](#) as well as **what** you have delivered, so it's important that we all demonstrate the right behaviours in everything that we do!

# My Development Form Conversation Framework

You can prepare for your review by asking yourself the [questions](#) on pages 5 & 6.

During the review, agree with your manager who will record the conversation, we recommend you own this but it's up to you and your manager to agree. The conversation is again the most important aspect of the review, so we have made the form simple and easy to complete.



## 1. Expectations

Here the discussed and agreed key tasks for the year should be recorded. For some roles we have prepopulated standard expectations which you can add to if required.

Your job description is a good source of information and could form part of the discussion.

## 2. Team Behaviours

You should discuss the team behaviours with your manager and what they mean in terms of your role.

What do you see as your strengths and development areas. Agree and record areas of strength and the development focus areas for the year.

See page 17 for further detail on the [Brand behaviours](#)

## 3. Learning & Development Needs

Record what you need to develop to help you grow and do your current role better and any Mandatory Training required.

# Conversation Framework - Looking Forward (Expectations)



## 4. Focus Areas/Career Aspirations

What are your career aspirations?

It's recognised that not everyone will have the ambition for more responsibility or a larger role so it's ok if there is nothing written here.

For those of you that do aspire - what additional objectives or special projects could you be involved in/responsible for in order to help you grow and develop?

# End of Year Review Conversation - Looking Back

## End of Year Review

At the end of the performance year you should sit down with your manager and review how you have performed over the year against each expectation and behaviour and tick the relevant box.

Exceeds	Has performed above expectations in most or all areas
Meets Expectations	Has performed at the required level in all areas
Developing	Has performed at the required level in most areas, development plan in place to help develop those areas where under performing
Below Expectations	Has not performed at the required level, action needed

Your manager will then discuss how you have performed overall . Descriptions of the [final ratings](#) can be found on page 9.

A summary of the final conversation can be recorded on page 2 of the form.

# Clinical Form Conversation Framework



At the start of the year, have a conversation with your manager to agree your expectations for the coming year. This is your opportunity to ensure you know what you need to focus on - both in terms of the hospital priorities and clinical excellence - the 'what' (e.g. objectives) and the 'how' (e.g. behaviours/compliance with your professional code of conduct). It's important to review the mandatory training required in the role too and to incorporate CPD as a key part of this discussion.

Its also an opportunity for you and your manager to discuss development needs, career aspirations and how you are going to work together during the year.



# Conversation Framework

## - Looking back (Review)

Whilst a half year review is not part of the formal process we would actively encourage you to have a formal review with your Manager at least part way through the year to ensure all objectives are on track and are still appropriate. A summary of any reviews, formal or informal can be recorded on the last page of the form.

At the end of year you will then need to sit down and have a conversation with your Manager about how you have performed against each area and a final performance rating will be provided. See page 9 for further information about [ratings](#).

### 1. Hospital Priorities & Clinical Excellence

How have you performed against the clinical expectations which were agreed? Were they achieved or not? Did you exceed expectations? How did you achieve the results? Has each individual objective been achieved/exceeded/not met? What were the specific challenges in meeting these objectives?

### 2. Brand Behaviours & Code of Conduct

Was your delivery of expectations and objectives in line with the behaviours? How have you developed in this area over the year? What are your strengths and what areas do you need to focus on improving next year?

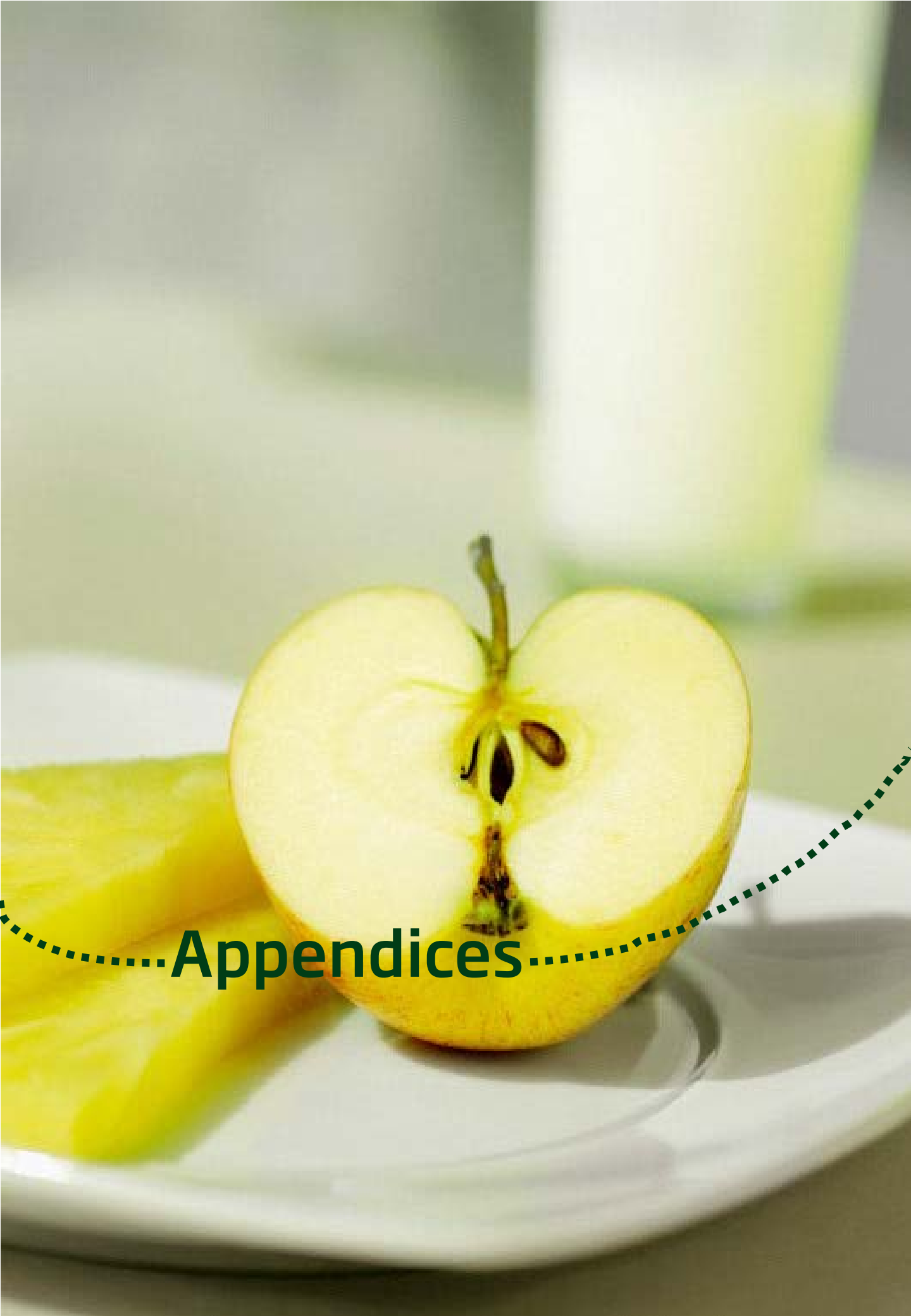
How did you comply against the professional code of conduct? How have you demonstrated this?

### 3. Development

How did you perform against your development plan? Have you completed all mandatory training within expected timescales? Have you undertaken appropriate CPD? What other training have you completed?

### 4. Overall

Your Manager will look back on the performance year and lead a discussion around how you have performed overall in the role against agreed expectations.



**Appendices**

# SMART objectives “The WHAT”

## All Objectives should be SMART!

<b>S: Specific</b>	i.e. has a single key result with no ambiguity in the wording used.
<b>M: Measurable</b>	i.e. there must be a means to show whether or not the objective has been achieved.
<b>A: Achievable</b>	i.e. it must be realistic and attainable given any known constraints (time, resources, business priorities, personal competence etc).
<b>R: Relevant</b>	i.e. it must be relevant to the overall aims of the team /department/organisation
<b>T: Time-bound</b>	i.e. there must be an agreed, achievable completion date

## How to convert an activity into an objective

1. “Train on Excel” - is not an objective - it’s an activity which you undertake in order to achieve something.

This can be written as an objective by specifying the outcome i.e.

Objective: To produce the month end spreadsheet to the required standards by January 10

Means by which it will be achieved: to attend training on Excel / gain experience by using Excel

Means by which it will be measured: Spreadsheet delivered to time and standards required

2. “Effectively liaise with consultants x’s secretary” - is not an objective, think about why you would need to liaise with the secretary.

If the answer to this was, “to understand what documentation they need when running their next clinic”, the objective could be defined as:

Objective: To provide the correct documentation for consultant x’s monthly clinic from 1st Feb 10

Means by which it will be achieved: To effectively liaise with secretary

Means by which it will be measured: Consultant x has all the documentation required to run the clinic - no last minute panics. Feedback from consultant is sought, recorded and measured.

# FAQs

***Q. What should I do if I'm not getting enough quality time with my manager***

A. It isn't just your Managers responsibility to ensure you are getting the right level of support, you are also responsible for driving your own performance and getting the support you need to do this. If you don't feel this is happening you should discuss this with your manager outlining what support you need (i.e. monthly face to face catch ups, weekly phone calls, etc). If you still feel you aren't getting the necessary support contact your HR Representative.

***Q. What development is available to me?***

A. You can find out more about what development is available via the Academy or the L&D Brochure. Alternatively ask your Manager, HR Representative or L&D Manager. For further information please go to [My Development](#) on page 18

***Q. What happens if I don't agree with my final performance excellence rating?***

A. If you are unhappy with your performance review you should firstly inform your Manager (who conducted the review meeting) that you are unhappy with the review and do not agree with the final rating. Your manager should arrange a meeting with you in order to informally discuss your concerns and try to resolve through further clarification and discussion. If following this meeting, you don't believe that all the concerns have been adequately addressed, you should discuss with your HR Representative.



# Brand Behaviours “The HOW”

THE NUFFIELD HEALTH BRAND BEHAVIOURS are the behaviours we all need to *visibly* display to achieve our strategic priorities and deliver our brand promise.

## Leadership Behaviours

(for individuals who manage people)

### I'm Enterprising

- I think outside the box to create an environment that encourages continual improvement and outstanding performance
- I keep things simple, commercial and drive out unnecessary bureaucracy
- I encourage colleagues to make their own decisions and learn from their mistakes
- I can spot and coach the talent I need to deliver results

### I'm Passionate

- I am a champion of Nuffield Health's vision both with my team and my customers
- I relentlessly push myself and others to be better
- I create an environment that inspires great customer service

### I'm Independent

- I am self motivated and creative in the way I inspire and develop my team
- I coach my team on what success is and recognise and reward them when they achieve it
- I communicate clearly and regularly with my team members and colleagues

### I'm Caring

- I am respectful towards my customers and colleagues
- I lead with wellbeing in mind, creating a positive climate where colleagues are listened to, can offer opinions and get direct feedback

## Team Behaviours

### I'm Enterprising

- I think outside the box, creating new ways of inspiring and engaging our customers
- I keep things simple and ensure I deliver all my duties on time and to the highest standards
- I demonstrate initiative - seeking opportunities to make improvements

### I'm Passionate

- I am a champion of Nuffield Health's vision, our role as a social enterprise and our approach to wellbeing
- I relentlessly push myself to develop my skills, build my knowledge and improve my performance
- I consistently deliver great customer service

### I'm Independent

- I am self motivated and always positive
- I always 'do the right thing' and put my customers first
- I communicate positively and confidently with all customers and colleagues

### I'm Caring

- I am respectful towards my customers and colleagues.
- I build rapport with every customer, am responsive to their needs and treat everyone as an individual
- I demonstrate empathy and always put myself in my customers' shoes

# My Development

## Identifying the 'gap'

Here are some questions to ask yourself, before entering into the conversation with your Manager. It will assist you in determining if you have any gaps and where training and development may be useful in providing solutions:

- What needs to be different?
- What would you need to show to demonstrate you have developed in that area?
- Is the development about knowledge/experience, if so what knowledge/experience?
- Is it about skill, if so what skill?
- Is it about behaviour , if so what behaviour?



## Identifying solutions and development opportunities

It is important that you consider alternative sources of development activities. Remember development is considered to be:

- 70% from on-the-job experiences, tasks, and problem solving
- 20% from feedback and coaching
- 10% from courses and / or reading

You should therefore consider what method of development would work best before jumping straight to a training initiative. Would job shadowing, coaching or mentoring be a suitable alternative, for example?

For current training programmes please refer to the L&D brochure or The Academy (LMS)