

## Personal Development Review

Name of employee	
Job Role	
Department	
Name of manager	

<b>Personal data review    Start Year</b>		
Role Profile reflects current job role	Yes / No	If No – action taken
Training record is up to date	Yes / No	
<b>Personal data review    Mid-Year</b>		
Role Profile reflects current job role	Yes / No	If No – action taken
Training record is up to date	Yes / No	

Date of review of last 12 months and new objectives setting	
Date of mid-year review (at 6 months)	

### Section 1 - Core Values Assessment

Tamworth Borough Council's Core Values were developed to provide guidance on how to conduct ourselves in order to achieve success, collaborate with team members and business partners (internal and external) and create a positive working environment. They are about HOW we accomplish our goals.

In advance of the PDR meeting, managers and employees should both rate separately the employee in EACH of the 9 core values using the rating scale below and the Core Value Guide in the supplementary guidance

- 4** = a clear **strength**, demonstrates exemplary adherence to this value and is a role model for others
- 3** = demonstrates value **consistently**
- 2** = demonstrates value **sometimes**, but not consistently
- 1** = does not consistently demonstrate this value, **needs to improve**

Core Value	Employee Rating	Manager Rating
Accountability		
Challenge		
Compassion		
Courtesy		
Decisiveness		
Empowerment		
Openness		
Honesty, Integrity & Respect		
Professionalism		

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Where a '1' is rated, an objective must be written in relation to that core value.

Where agreement is not reached, please outline the rationale in the comments box below.

Reviewee comments on Core Values:

Reviewer comments on Core Values:

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### Section 2 - Review – Looking back

This section should be used to review objectives from the previous 12-month period

Review of objectives/performance from previous period		
Objective	Met/Not Met	Evidence of achievement or reasons for not met

**What has been your greatest work achievement in the last 12 months?**

**What had been your biggest work frustration in the last 12 months? Can anything be done to reduce this frustration in the coming year?**

### Summary Comments

Employee comments – End of review year
Manager comments – End of review year

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**End review assessment against objectives – to be completed by the Manager**

Objectives not achieved	
Objectives mostly achieved	
Objectives all fully achieved/exceeded	

Where 'objectives are not achieved', consideration must be given to instigating the Capability Procedure and the rating must be reviewed and validated by the Head of Service/Assistant Director.

Signature of Head of Service/Assistant Director	Date

**Section 3 - Performance Planning – Looking forward – Performance and behavioural objectives for the coming 12-month review period**

**Each objective must be SMART (Specific, Measurable, Achievable, Realistic and Timely) Please refer to the supporting guidance for information**

Objective 1	
Mid Review Comments	Discuss evidence for progress towards achievement of objectives and record

Objective 2	
Mid Review Comments	Discuss evidence for progress towards achievement of objectives and record

Objective 3	
Mid Review Comments	Discuss evidence for progress towards achievement of objectives and record

Objective 4	
Mid Review Comments	Discuss evidence for progress towards achievement of objectives and record

Objective 5	
Mid Review Comments	Discuss evidence for progress towards achievement of objectives and record

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### Summary Comments

Employee Comments – Mid-year review
Manager Comments – Mid-year end

### Learning and Development Plan to support objectives

This section should be used to review development from the previous 12-month period and to agree and plan future development for the year ahead. Employees should use this section to record and evaluate learning and development undertaken during the review period.

Consider;

- Development that took place
- Skills and experience gained, and the contribution this made to team achievement
- Planned development that did not take place, why not and decide if this is still relevant for the next plan
- Development that took place although was not planned

<b>Commentary</b>

Future needs should include specific skills or knowledge to be acquired to enhance the employee's performance in their current role and to build competencies and knowledge to advance the employee's career development.

Future needs	Action

Signed employee		Date	
Signed manager		Date	

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