



Striving for excellence and developing our employees

# Appraisal and Development Review (ADR)



## Guidance for Employees as Reviewees

# Appraisal and Development Review (ADR)

## Introduction

This guide explains how the council's appraisal and development review process applies to you as an employee and should be read in conjunction with the Process Overview and Employee Guidance - Questions and Answers.

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The ADR Process Map is on page 5 and gives an overview of the various steps involved.

Review processes vary according to job type and service structure and the nature of your job will determine how your review is carried out by your line manager.

The ADR process for employees who have direct responsibility for the management of others is structured differently to deal with the key leadership and management aspects of the role.

The review documentation is presented in electronic format on MyToolkit. Hard copies can be printed off for individual use as required.

## Purpose

To provide you with a clear understanding of what the review process is designed to achieve and what you need to do to ensure that you receive the necessary feedback and development support.

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It's important to remember that ADR is not just about assessing past performance - it's also about driving behaviour that will sustain future performance. Carried out well, it can significantly enhance working relationships and improve motivation and performance.



# The Process Step By Step

## How does the process apply to you?

Step 1

The format of your review meeting will vary according to the type of job you do.

Your line manager will confirm how the process will apply to you, what you should

expect at your review meeting and inform you of the timescales involved. You may be required to complete a review template in advance of the review meeting.

Step 2

## Review meeting arrangements

Where the nature of your post requires you to complete the review documentation in advance you will be given at least four weeks notice of the meeting date.

Where you are not required to complete documentation in advance, review meetings should be organised to ensure that you have reasonable notice e.g. 2/3 weeks before the review is due take place you will be issued with appropriate information on the review criteria to be used at this time.

The length of your review meeting will

depend on the nature of your post and sufficient time will be allowed by your line manager to ensure that all the relevant review requirements are met.

Your manager will direct you to the appropriate review template and accompanying guidance which can be found on MyToolkit.

If you do not have online access to MyToolkit, your line manager should ensure that copies of relevant guidance are made available to you at your workplace.

## Preparing for your review meeting

Step 3

You should prepare for the review meeting beforehand and complete the appropriate template if required.

Points for you to consider include:

- how well have you performed against your work targets and standards?
- what specific examples or other evidence are you able to provide to back this up?
- have agreed learning and development objectives from the last meeting been achieved?
- what factors may have helped or hindered your performance?
- how well have you responded to any challenges?
- what potential actions could be taken to develop or improve your performance?
- what specific feedback/comment would you wish to discuss with your manager?
- what objectives and activities should be in your work plan for the next review period.

## Step 4

### Your review meeting

The review meeting has three parts:

1. Review of personal performance and achievements.
2. Evaluation against the council's core competencies and any specific vocational/professional/technical competencies and standards required of you.
3. Agree a performance development plan.

Review formats will vary according to job type and service structure but will focus on the job's key result areas. The purpose of the discussion is to:

- Agree your work outcomes and performance standards
- Discuss all aspects of your job and your performance

- Identify your development needs based on the relevant competencies for your post
- Agree any areas for performance improvement including related development needs

To get the most out of the meeting, you should be prepared to engage positively with your line manager and ensure that you deal honestly and openly with any feedback you receive or choose to give.

There should be no "surprises" for either you or your line manager at the meeting – any ongoing issues arising should have been raised and dealt with as part of regular one-to-one and team meetings/briefings throughout the working year.

### Agree a performance development plan

## Step 5

Your Performance Development Plan sets out your key development needs and should be specific, quantifiable and time based, with clear accountability for implementing the agreed actions.

Actions should be reviewed on a regular basis at your one-to-ones and interim reviews as part of mainstream management activity.

## Step 6

### Sign-off the recorded discussion as an accurate record

The review information supplied in preparation for your review meeting may require some updating/amendment in the light of discussion prior to final sign-off. Your manager will indicate how these amendments will be made and ensure that the documentation is complete

The written content will be retained as a record.

The Process Sign-off form summarises the overall outcome of your review.

Both you and your line manager are required to sign the form and keep individual copies, referring to the development plan on a regular basis to ensure that identified actions are being completed.

ADR complements good day-to-day leadership and management practice and provides the means to pull together any ongoing performance and development issues discussed with you during the working year.

Your line manager is required to schedule regular one-to-one meetings with you as indicated in the council's Employee Engagement Framework to ensure a joined-up approach and continuity with ADR.

## ADR Process Map (7 Steps)



# Appraisal and Development Review (**ADR**)



## Further guidance and support

As referenced above all ADR documentation is in MyToolkit. If there are any other queries on the process contact HR on 01506 282222 or email [learn2develop@westlothian.gcsx.gov.uk](mailto:learn2develop@westlothian.gcsx.gov.uk)

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