

Managing performance

An introduction to performance planning for individuals

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Learning+Skills Council

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Introduction

The Learning and Skills Council (LSC) has introduced a new Performance Management (PM) system that applies to us all.

PM encourages everyone to:

- be clear about what they need to achieve;
- hold regular discussions about how well they are doing;
- take action to meet development needs; and
- assess how well they have done at the end of the year.

This module is designed to:

- 1 give you a summary of the new PM system;
- 2 describe what happens, particularly at the performance-planning stage; and
- 3 prepare you for a one-to-one planning meeting with your manager.

There will be more information and training about other elements of PM later in the year – see the PM Guide on the intranet or talk to your manager or human resources (HR) team for more information.

This system is a new approach to PM for all of us in that it looks at 'what' we do as well as 'how' we do it. However, depending on your past experience of PM, you might already be familiar with some of the information in this module. You can use the learning objectives on page 5 as a checklist to identify the sections that are new to you.

Why is this important to me?

The most successful organisations are those that value the contribution of their people as much as they focus on the goals of the organisation. As an organisation, we have some very challenging goals to improve learning and skills in England. We cannot succeed without giving our people a working environment that makes it clear for them what their contribution is, and helps them achieve that contribution.

PM is a way of making sure that you have that clarity and support. We have designed this module to help you understand our PM system so that you can get the best out of it.

How does it work?

Because it aims to give you knowledge, the module will teach you enough for you to be able to develop your performance plan for the current performance year.

However, it cannot teach you a skill. You can only achieve this through the 'hands-on' experience you get from discussing the full contents of your performance plan with your manager.

How do I use this module?

This module is in seven sections. The time you will need may vary from section to section, depending on how much you know about PM. We all read and learn in different ways and at different speeds, so work through it at a pace that suits you. The different sections ask you questions as you go along and there is space for you to write down your answers. There are also some extra notes pages at the end of the module.

Key points are shown
with this symbol:



You don't have to do all the sections at once or even in the order they appear in the module. We recommend that you take two to three hours to complete the module, taking regular breaks so you can think about what you have learned. We have designed the module so you can control your own learning and development. How much you get out of it is up to you.

What am I supposed to be learning?

We have designed this module to help you do the following.

- Describe the PM system.
- Explain your role and responsibilities within PM.
- Explain the role of others within PM.
- Identify the benefits of PM to you as an individual.
- Identify the benefits of PM to the LSC as a whole and to your team.
- Describe the performance-planning process.
- Define what a performance objective is.
- Explain what the acronym C-SMART means.
- Define what a performance measure is.
- Describe what our Ways of Working are and how they fit into the performance-planning process.
- Explain your role in identifying, and planning to satisfy, your development needs.

You are in charge of your own learning, which means that you decide when you've achieved the learning objectives.

If you would like to find out more about PM, you can look at the PM Guide on the intranet. If you still have any questions, you should speak to your manager.

How will I know if I've met the learning objectives on page 5?

To help you assess whether the module has worked for you as a training tool, it ends with a self-assessment questionnaire. This is not a 'test' – it will help you identify areas where you may need more information, for example, by referring to the PM Guide on the intranet, or talking to your manager or local HR team.

Symbols that relate to answers to the self-assessment questions look like this:



What materials and resources will I need?

To get the most out of this module, you will need:

- a pen and access to the PM Guide on the intranet (the Guide is the overall 'reference' source for detailed information about all aspects of PM in the LSC);
- a copy of your local strategic plan (your manager should be able to give you a copy before you start working through the module);
- a copy of your up-to-date role description; and
- a quiet place to work without interruption (or ask people not to disturb you).

How does all the training fit together?

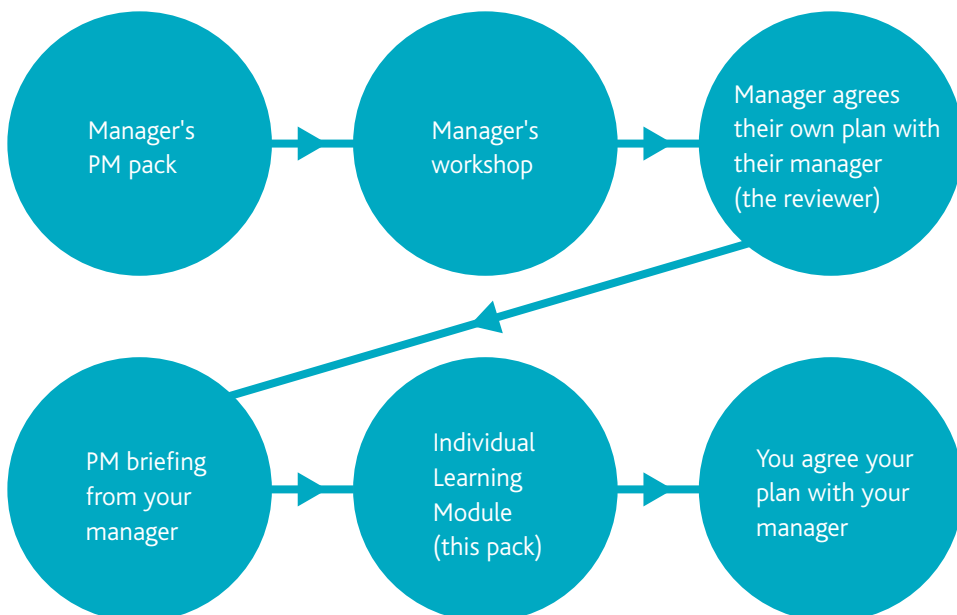


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Section 1

What is Performance Management all about?

The new PM system is a way of making sure that we all perform to the best of our ability and we achieve our challenging strategic goals.

If you don't already know what our mission and vision are, find out from either your local strategic plan or our corporate plan on the intranet.

Put simply, PM is a way of making sure that we all work together to achieve our goals, mission and vision.

PM is:	PM is not:
<p>about everyone taking responsibility for helping us achieve our mission;</p> <p>an opportunity to make our expectations clear;</p> <p>a way of linking individual objectives to our overall objectives;</p> <p>a tool to help managers and individuals realise everyone's potential in a fair and consistent way;</p> <p>about how we can take ownership of our own development and contribution to the LSC; and</p> <p>about 'what' we do (objectives) and 'how' we do it (Ways of Working).</p>	<p>a new appraisal system, focused on paperwork, but a way of focusing on individual and organisational success;</p> <p>a 'system' for human resource teams to use – it is a 'business' tool;</p> <p>something that happens once at year at 'appraisal' time – it happens every day;</p> <p>managers 'doing it' to their people – it involves everyone as individuals;</p> <p>focusing on the system of PM – the system just provides the structure; and</p> <p>spending so much time collecting evidence that nothing is delivered! There has to be a balance.</p>

PM is an annual cycle. It means that you and your manager:

- discuss and agree your performance plan at the beginning of each year (normally 1 April but this may be different for this first year or if you start a new role at another time of year);
- agree the coaching, support and development you need;
- regularly review your plan, your progress and your achievements during the year; and
- discuss and agree at the end of the year (normally 31 March) how you have performed overall, and agree a performance plan for the following year. (If you move roles at another time of year, the timing of the assessment will be different.)

Some of these activities take place several times a year and others only once.

The diagram below shows how the activities fit together.



1 Performance planning

- What are the goals and objectives of my team?
- How do these contribute to the strategic plan?
- What is the purpose of my role?
- What do I need to do, to what standard and by when?

2 Progress discussion (first six months of the year)


- How am I doing against my plan?
- What am I doing well?
- What do I need to do differently?

3 Progress discussion (second six months of the year)

- How am I doing against my plan?
- What am I doing well?
- What do I need to do differently?

4 Performance assessment


- How well have I done against my plan?
- How can I improve?

It is important to remember that PM is not about a system, although that is certainly important in providing a structure and consistency for our people and keeping us on target as an organisation. PM is more about the way we achieve our goals .

Q1

Who does what in PM?

You:

- take an active part in drawing up and agreeing your performance plan;
- take responsibility for your performance and development on a day-to-day basis .
- make sure your regular progress discussions with your manager take place; and
- take an active part in reviewing your progress, including getting feedback, coaching and support as necessary.

Your manager:

- helps you to be clear about what is expected of you and agrees your performance plan with you;
- makes sure that everyone is treated fairly and consistently, considering the diverse needs of staff to allow them to make a full contribution to their role;
- agrees your development plan, making sure that you receive suitable support for it;
- holds regular discussions with you about your progress and achievements;
- assesses and agrees your overall performance, based on evidence of your performance;
- makes sure that your performance plan is properly completed; and
- supports you to achieve your performance plan by providing feedback, coaching and suitable resources.

Your reviewer (in most cases this is your manager's manager):

- makes sure that your manager is applying PM consistently and fairly across the team, in line with our equality and diversity principles;
- fulfils the manager's responsibilities (as above) for your manager and other managers reporting to them;
- makes sure that your manager is balancing individual and organisational needs;
- agrees with your manager how team objectives will be passed down to you and other members of the team;
- comments on the overall assessment of your performance at the end of the year;
- helps you and your manager reach an agreement if there is a disagreement related to PM; and
- supports your manager in the PM system throughout the year.

There are two other groups – champions (senior leaders) and HR colleagues – who also have a particular role to play.

Your local champion (normally a director):

- Is the manager or reviewer (or both) for others;
- has a responsibility to promote PM as an important business 'tool' that is vital to good management, and to achieving the Investors in People standard; and
- sets an example to others by putting PM into practice 'from the top', showing good leadership.

Your local HR team:

- 'quality assures' the PM system in your local area;
- helps make sure that people follow our equality and diversity principles;
- plans resources for development needs in your local area;
- advises on related procedures where necessary, such as grievance and capability; and
- provides support, advice and guidance on PM to you, your manager and reviewer.

To help everyone (you, your team and the organisation) achieve what is needed, PM needs a certain amount of commitment from us all. Take a moment or two to think about how you benefit from PM.

The things you identified will obviously be personal to you, but typical benefits would be that you:

- are directly involved in agreeing your performance plan and can take responsibility for your own performance and development;
- know what's expected of you and how well you are doing;
- have the opportunity to discuss any individual needs you may have and be involved in developing solutions;
- get support to develop your skills;
- get recognition for your achievements and the way you work; and
- get more job satisfaction and feel better motivated.

How will we benefit (or, if it's easier to think in those terms, how will your local team benefit) if everyone takes part in PM?

We will benefit because:

- our resources are focused on the things that matter;
- everyone knows how their role contributes to the LSC as a whole;
- the team, and so the organisation, can measure their progress towards their goals;
- we are constantly learning and growing, and we are better able to respond to challenges; and
- our ability to achieve our goals is improved.

Let's move on to the planning stage, which is the first step in the PM cycle.

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Section 2

Why is performance planning important?

What is the purpose of the planning meeting?

The planning meeting is the first step in the annual cycle. It is where you will discuss with your manager what is expected of you to perform successfully in your role.

Performance planning


- What are the goals and objectives of my team?
- How do these contribute to the strategic plan?
- What is the purpose of my role?
- What do I need to do, to what standard and by when?

This first meeting is an important part of the year's work. It's a chance to discuss priorities so you have a clear idea of:

- what you are expected to achieve;
- how your plan links to your team's objectives; and
- how they link to those of the organisation as a whole.

It is only by everyone having an effective performance plan that we can all focus our efforts to make sure that what we are doing really is contributing to the team's overall success and ultimately to the success of the LSC.



Everyone needs a performance plan because everyone's performance is critical to our success. No matter what your role, it is only through your efforts and achievements that we can achieve our goals for the benefit of partners, employees and learners, and the communities in which we operate .

To agree a clear performance plan, you and your manager will need to understand the following.

- The **objectives and targets for your team** – depending on where you work in the LSC, the 'team' may be the immediate team in which you work, the directorate or the whole office. The local strategic plan will give details of local objectives.
- The **purpose of your role** and your **key areas of responsibility** – you can find details in your role description.


Q2

In summary, this planning meeting is where you will agree with your manager:

- what you have to achieve (performance objectives);
- how your performance will be measured;
- how you will be expected to work to achieve your objectives (our Ways of Working – covered later in section 5);
- your development needs; and
- the support you need to achieve either your performance objectives or your development needs.

Section 3

What are performance objectives?

Performance objectives tell you what you need to achieve to be successful in contributing to your team and local strategic objectives .

Your performance plan sets out between two and five key performance objectives that you will be expected to achieve in any performance period (usually a year). These are the things that will help us achieve our mission. While some of your objectives might not vary much from year to year, it is still important that you fully understand how your objectives link into the team and local strategic objectives.

As you agree your objectives with your manager, you will focus on making them as clear and specific as possible – the clearer and more specific they are, the easier it is to assess how well you're progressing against them over the period that they have been agreed for.

What are the top tips for agreeing objectives?

- a** Do they link directly to local strategic or team objectives?
- b** Do they relate to your main areas of responsibility in your up-to-date role description?
- c** How clear are you about what you are expected to achieve?
- d** What time limit should be set for an objective?
- e** Do they represent a 'contribution' to a bigger target?
- f** How close are you to being fully competent in the role?

We'll look at each of these points individually.

a Do they link directly to local strategic or team objectives?

As set out in the diagram on page 14, your performance plan should be in line with local and team objectives. These should then link to the objectives of the LSC as a national organisation. These link to our objectives and are vital to our overall success in meeting the challenging agenda that we have been set. They are also very important in helping us to meet the Investors in People standard.

b Do they relate to your main responsibilities in your up-to-date role description?

Your main or key responsibilities in your role description are the areas of your work that you will need to concentrate on to be successful in your role. If you do not have an up-to-date role description, you should not continue with the performance-planning process without one. If this is the case, talk to your manager or local HR team (or both). Again, your objectives should support what you need to do to contribute to your local area's success.

c How clear are you about what you are expected to achieve?

Imagine that you are a manager's personal assistant and have the following objective.

'To provide typing and administrative support to the manager on an ongoing basis.'

If you were that personal assistant:

- how clear would you be as to what exactly is expected of you;
- how would you know, three months down the line, whether you're doing more or less than is expected;
- how hard would you have to stretch yourself to achieve this;
- how satisfied would you be if you achieved this; and
- how would you be able to measure your own performance against this objective?

The temptation, when agreeing performance objectives, is to express them in terms of specific tasks. Thinking of our personal assistant, examples might include:

- typing documents and memos;
- sending faxes;
- sorting and distributing post;
- arranging meetings;
- distributing agendas;
- filing;
- updating records;
- answering the phone;
- making bookings in the diary;
- preparing presentation materials; and
- sending and receiving e-mails.



So why aren't these suitable as objectives?

- Tasks are what you need to **do** (that is, an activity in its own right).
- Objectives are what you need to **achieve** (that is, something that has an end result).

As your performance will be assessed at the end of the year against the objectives in your plan, it is important that you make sure those objectives are as good as they can be. Investing time at the planning stage is essential to avoid problems when assessing how well you have achieved what is in your plan. Imagine how difficult it would be to assess your overall performance if all your objectives were written like the one on page 17!

A summary of the difference between these things is shown on the next page.

Main responsibility	Performance objective	Tasks
Provide typing and administrative support to the manager on an ongoing basis	Manage and monitor the manager’s diary to smooth out the flow of the manager’s work and to meet the needs of other people at the same time	<ul style="list-style-type: none"> ● Arrange meetings ● Distribute agendas ● Answer phones ● Make bookings in the diary

The acronym below provides a useful checklist for effective performance objectives, although you may need a combination of a performance objective and supporting measures (covered later in section 4 of this module) to make it C-SMART overall.



- C Challenging** Your objectives should stretch you to improve and go beyond your current level of performance.
- S Specific** They should be precise and unambiguous so that everyone understands what you’re aiming for.
- M Measurable** You should be able to tell when you have achieved them. Performance measures are an important part of this and can be used to look at the quality and quantity of what is expected.
- A Achievable** They should be realistic for you to achieve, within your capability, skills, experience and control, and take account of your specific needs and circumstances.
- R Relevant** They should be relevant to your role and fit in with your team’s objectives.
- T Time-bound** Setting a time limit to your objective, wherever possible, clearly states when it must be achieved by. Performance measures can also be used for the ‘time’ element of what is expected.

d What time limit should be set for an objective?

Any time limit needs to relate to the objective itself, rather than the performance period. For example, if you need to achieve something by the end of the sixth month of the performance period, that is the time limit that will be given in the plan, even if the plan covers 12 months.

e Does it represent a 'contribution' to a bigger target?

There may be some targets or objectives at a team or local level that are influenced by things outside your control. In these cases, it is important to remember that you will be measured on your contribution to a particular target rather than your achievement of the target itself.

f How close are you to being fully competent in the role?


You may have been doing the role for a while and have all the skills, experience and knowledge you need to be fully competent in the role. Or, you may be new or very recently appointed to the role.

It is important that the objectives reflect your current ability as an individual and consider any individual or special needs. You may not be expected to achieve the same level of contribution or performance as your more experienced or knowledgeable colleagues. However, your objectives should still challenge you.

Examples of the sorts of performance objectives that might be suitable for the personal assistant are given on the sample performance plan on page 26.

Section 4

What are performance measures?

'Measures' are simply what you and your manager will use to assess how you are doing throughout the year . They provide information about how you are succeeding against any given objective or whether your performance is not quite what is expected.

It is important to remember that measuring performance is part of the process, not an activity in its own right. It is easy to spend so much time measuring performance that nothing is achieved!

Measures will fall into one of the following categories.

Time – (by when)

Quantity – (how much or how many)

Quality – (to what standard)

You and your manager will agree measures that are appropriate to your objectives. You do not necessarily have to include all three types of measure. It is important to concentrate on those that are the most important and relevant. However, you should be aiming to measure more than just whether you achieved your objective on time.

Check point: You may find that trying to define your measures has made you re-assess your performance objectives. Do the performance objectives and supporting measures make what you are trying to achieve C-SMART? Going back to our example for the personal assistant:

Objective	Measures
Manage and monitor the manager's diary to smooth out the flow of the manager's work and to meet the needs of other people at the same time	<ul style="list-style-type: none"> ● No meetings missed or double-booked due to mistakes. (Quantity – how many?) ● All information that is needed for meetings is collected in advance. (Time – adequate?) ● Travel arrangements (for example, maps and accommodation) meet the manager's needs. (Quality – satisfies need?)

Examples of the sorts of performance measures that might be suitable for the personal assistant are given on the sample performance plan on page 26.

The sample performance plan on page 26 shows lots of examples of measures. You would not necessarily expect to use as many as this.

Having identified what measures might be appropriate, you will need to agree the following with your manager.

When – How often your performance will be 'measured'.

Who – Who will gather what information?

How – How will you go about it?

Options include:

- random sampling by the manager;
- feedback gained from others;
- support material ('evidence') collected by the individual; and
- 'exception' reporting (that is, looking only at where 'more than' or 'less than' satisfactory performance happens).

Finally, it is worth remembering that measuring performance is not about collecting information on processes or designed to meet administrative requirements for 'documentary evidence'. It is about getting evidence for outcomes over time.

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Performance Plan

Name: Chris Williams	Role title: Personal Assistant	Performance period: 1 April 2002 to 31 March 2003
Section or department: Operations	Manager: Alex Leistikow	Reviewer: Rav Bhayani
Team objectives and targets This section is completed in line with the local strategic plan		
Your objectives What do you need to achieve?	Measures <ul style="list-style-type: none"> ● How will you know you have succeeded? ● By when do you need to achieve this? 	Achievements and progress <ul style="list-style-type: none"> ● What key achievements have you succeeded in delivering since your last progress discussion? ● What do you need to focus on over the next performance period?
Manage and monitor the manager's diary to smooth out the flow of their work and to meet the needs of other people at the same time.	<ul style="list-style-type: none"> ● No meetings are missed or double-booked due to diary errors. ● All necessary information is collected from others in advance. ● Travel itineraries (maps, accommodation and so on) meet manager's needs. 	
Produce all documentation and records to the highest standards and on time, making sure they are then filed properly.	<ul style="list-style-type: none"> ● No more than two documents a month are referred back to the PA for errors to be corrected. ● Information needed for monthly management meetings is prepared no later than the third working day of each month. ● Current files are archived every four months. 	
Organise all aspects of the manager's meetings to meet the needs of the people that go to them.	<ul style="list-style-type: none"> ● All appropriate people are invited, and receive any necessary background information and an agenda three days beforehand. ● A meeting room, audio-visual equipment and refreshments are provided as requested. 	This section is completed at the progress discussion
Complete the organisation of administration and logistics for the two day national conference by 31 July 2002.	<ul style="list-style-type: none"> ● The venue, catering and facilities are booked by 31 May 2002. ● All presenters are confirmed and briefed by 15 June 2002. ● People are invited and 'marketing' communications are issued by 30 June 2002. 	This section is completed at assessment time
Follow all internal policies and procedures at all times.	<ul style="list-style-type: none"> ● No more than 5% errors in completing requisition orders for the finance team. ● All expenses claims and reports are completed correctly and submitted within agreed time scales. ● Appropriate security maintained for all documents and records classified as 'confidential'. 	

Section 5

What are the Ways of Working

So far we have looked at the 'what' of your role, and in this section we'll consider the 'how'. PM focuses on **what** we are expected to achieve (our objectives) and **how** we go about it (our 'Ways of Working').

The 'inputs' of performance (the how) affect the outcomes we achieve (the what). It is impossible to separate the inputs and outcomes of performance, and in reality, objectives and Ways of Working are not two separate things .

What are our Ways of Working?

Our Ways of Working describe how we are all expected to go about our day-to-day activities, and they make the difference between poor, good and excellent performance. Your end-of-year assessment will take account of the extent to which you have demonstrated the Ways of Working. They cover six different areas and fall into three levels. The level at which you are expected to work depends on your role in the LSC.

The six Ways of Working are:	
Working Together;	Thinking Things Through;
Focusing on Performance;	Achieving Results; and
Developing Yourself and Others;	Working with Change.

Q5

What are the different levels for in the Ways of Working?

Each of the Ways of Working is described at three levels. These levels reflect the way in which people increase their contribution as they develop their skills and abilities. Each level builds on the one before.

Level A – Assisting and applying	Level G – Guiding and developing	Level S – Shaping and steering
At this level, you assist others and apply your knowledge and skills to:	At this level, you guide and develop others. You:	At this level, you shape and steer the organisation. You:
<ul style="list-style-type: none"> ● take on responsibility for one or more parts of a process or project; ● manage and organise your own time to make sure that work gets done; ● work on tasks and activities with some supervision; and ● work effectively as an individual or as a team member (or both). 	<ul style="list-style-type: none"> ● are involved in developing people through managing, coaching or mentoring; ● deal with the outside environment for the benefit of others in the organisation; and ● develop your technical and professional skills, and are able to provide advice and guidance to others. 	<ul style="list-style-type: none"> ● have significant influence over the future direction of a major part of the organisation; ● have decision-making power and authority on behalf of the organisation; ● act as a representative in wide and varied interactions, both outside and inside the organisation; ● provide overall leadership; and ● sponsor and develop future successors.

In most cases, a role will clearly fall into one of the three levels. Sometimes, a role may involve more than one level, and a 'profile' of which levels relate to which of the areas of the Ways of Working will need to be agreed with your manager.

Think about some of the roles in your part of the LSC. Which roles would fall into which levels? Where would your own role sit?

Level A – Assisting and applying

Level G – Guiding and developing

Level S – Shaping and steering

For each of the six Ways of Working, we have developed a summary of the three levels. These are given on the following page.

How do I decide which level is right for me in my role?

The first step is for you and your manager to agree the overall level of your role.

- Does your role need someone who can **assist** others and **apply** their skills independently or as part of a team?
- Does your role need someone who can **guide** and **develop** others?
- Does your role need someone who can **shape** and **steer** the organisation?

Ways of Working	Level A Assisting and applying	Level G Guiding and developing	Level S Shaping and steering
Working Together	Builds a good working relationship with those who depend on or influence their own work, working with others to get things done.	Builds and maintains productive relationships across and, where appropriate, outside the LSC, actively involving and consulting internal and external partners.	Creates and reinforces a culture of collaboration, breaking down barriers inside and outside our organisation to achieve long-term goals.
Focusing on Performance	Makes an active contribution to the team, showing personal commitment to achieving agreed objectives.	Provides day-to-day leadership for the team, managing individual performance to allow team members to contribute to the best of their ability.	Makes clear the strategic goals for the business area. Creates a culture that values people, recognises their achievements and encourages them to take responsibility for their own performance.
Developing Yourself and Others	Puts effort into developing their own skills and abilities. Helps colleagues with practical on-the-job development activities.	Improves their own skills by developing specialist and functional knowledge, and getting feedback on their own performance. Helps others develop through coaching, delegation and feedback.	Develops their knowledge in their own specialist area, acting as a role model for continuous professional development. Makes sure enough time and effort are invested in developing their people.
Thinking Things Through	Makes appropriate decisions and judges when to involve or consult others.	Assesses issues and problems from different points of view. Makes decisions that take account of both short-term and long-term implications.	Analyses and resolves complex issues and problems, making decisions on behalf of the organisation.
Achieving Results	Organises their own workload to meet deadlines and expectations, using resources effectively and efficiently.	Produces and manages implementation plans, identifying the tasks, outcomes and resource requirements to achieve overall objectives.	Sets and reviews the overall boundaries in which others plan their work, taking a strategic view across business areas.
Working with Change	Adapts to changes that affect their own work and makes suggestions for improvements in their own area.	Encourages and demonstrates creative thinking, putting into practice new approaches that improve performance. Helps others to understand and cope with change.	Provides clear leadership, direction and focus in times of change, dealing with resistance and acting as a champion of good practice.

Through discussion, you should agree the performance level required for your role.

As explained on page 28, in most cases one level will describe your role.

Exceptionally, you may find that for one or two of the Ways of Working, the role needs a different level. For example, a role that is mainly level A could also be level G on 'Working Together' if the person does a lot of work with different stakeholders inside and outside the organisation. In these circumstances, please refer to the full descriptions in section 3 of the PM Guide for more information.

Take a moment to think about whether this situation applies to you.

Which level do I need to perform my role effectively in each of the six areas – A, G or S?

Working Together

Focusing on Performance

Developing Yourself and Others

Thinking Things Through

Achieving Results

Working with Change


Having agreed the appropriate level at which you need to operate (A, G or S), you should make a note of that level on page 2 of your performance plan, in line with the sample given on the following page.

Ways of Working

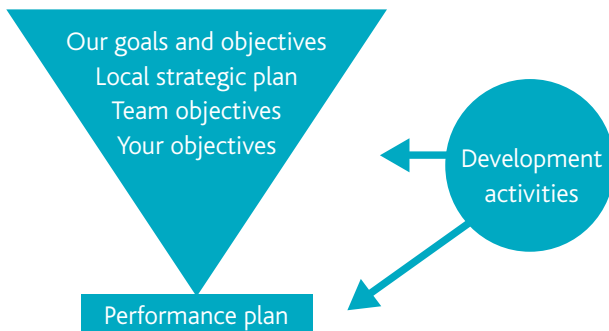
<p>Performance level required</p> <p>Assisting/applying A Guiding/developing G Shaping/steering S Delete as appropriate</p>	<p>Note If the performance level required in an individual Way of Working is different to the general level above, record the appropriate level in the first column.</p>	<p>Annual performance against expectations</p> <ul style="list-style-type: none"> ● Exceeded ● Met ● Approached ● Below
<p>Working Together —</p>	<p>Record examples of either:</p> <ul style="list-style-type: none"> ● performance that meets expectations; ● exceptional performance above expectations; or ● performance which does not reach expectations. 	
<p>Focusing on Performance —</p>		
<p>Developing Yourself and Others —</p>	<p>This section is completed at the progress discussion</p>	<p>This section is completed at assessment time</p>
<p>Thinking Things Through —</p>		
<p>Achieving Results —</p>		
<p>Working With Change —</p>		

Summaries of the levels for each Way of Working are given on page 30. Full descriptions are given in section 3 of the PM Guide.

You may have thought about learning a foreign language, getting fit at the gym or working with a new computer application. Because **you** took the responsibility to learn, **you** made the arrangements and **you** controlled the programme and pace of learning, it is likely that your level of motivation and commitment towards the task was greater than if someone else had taken responsibility.

While your manager has a responsibility to provide you with development opportunities and support, it is up to you to take the opportunities on offer and make the most of them .

If, as an organisation, we are to become as committed to learning ourselves as we are to developing others in society, we all need to take responsibility for our own development.



Your development activities should clearly relate to you achieving your performance objectives, and so be linked to business needs. For more guidance on development planning, there is a 'checklist' in section 4 of the PM Guide.

How can I plan for my development?

Working through the questions below will give you a good start. You will also need to think about:

- within what timescale the development activity will be done; and
- how you will know when you've met your development need.

Q6

<p>When you are identifying development needs, it is important to ask yourself, 'What will I be able to do that I can't do at the moment?' This helps you to work out what you need to learn and also how it will improve your performance.</p> <p>When identifying your development needs, you should consider the following.</p>	<p>There are many factors that will affect your choice of development option. You can develop in many ways, rather than just going on formal courses.</p> <p>When deciding on your development solutions, you should consider the following.</p>
<ul style="list-style-type: none"> ● Do your performance objectives mean that you need to develop more knowledge or skills in order to achieve them? ● What did you do well last year? What could you have done better? Is this a development need? ● Who could you ask for feedback on your performance, to help identify strengths and areas for improvement? ● Do the Ways of Working present you with any challenges? Do you have any development needs here? 	<ul style="list-style-type: none"> ● What is your preferred way of learning? Do you prefer to observe and reflect or just 'have a go'? ● What resources are available? How does this affect your choices? ● What is the most suitable learning or development method? (For example, reading is probably not the best way of learning a new skill.) Do you have any specific needs that need to be considered (for example, accessibility, format and a flexible working pattern)? ● What support do you need (for example, coaching, feedback, time away from your desk or access to an expert)?

Take a moment to write down your initial thoughts about what development activity you might want to discuss with your manager.

What areas for development could I discuss with my manager?

How do I make sure I receive the right support for my development?

It goes without saying that there will always be a limit to the resources that are available to support development activity (be that in terms of time, money or people). When discussing development with your manager, you may have a longer list of development areas than can practically be supported. Within the initial planning discussions, you will need to agree which activities are 'high priority' and which, while still important, are more 'desirable' than 'essential'.

The Learning and Development Policy in section 9 of the Survival Guide on the intranet (under 'Policies and Guidance') gives you more information on the mandatory, core and optional priorities. A sample development plan is provided on page 38.

You and your manager can also get advice and guidance on development issues from your HR team.

What happens once I've agreed my plan with my manager?

Once your performance plan has been completed and 'signed off', you will need to send a copy to your local HR team and give a copy to your manager for their records. This will allow HR teams to plan resources and understand what activity is needed to meet the development needs of the individuals they support. It will also allow them to 'moderate' the levels of the Ways of Working by comparing profiles for people doing the same, or very similar, roles.

What happens if I can't agree my plan with my manager?

In the unlikely event that you and your manager cannot agree any aspect of your plan by referring to other appropriate documents (for example, the local strategic plan and your role description), please contact your reviewer.

What happens next?

Having worked through this module and completed a lot of the preparation for your plan, you should now:

- have your one-to-one performance-planning meeting with your manager to agree and finalise your plan; and
- agree dates for your progress discussions and arrangements for any one-to-one discussions that will take place between these 'formal' reviews.

You can find a performance-planning checklist in section 2 of the PM Guide.

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Development plan

Development need I need to be able to:	Priority ● Mandatory ● Core ● Optional	Development activity I will:	By when	Resources or support I need:	Evaluation How effectively has my development need been met?
<ul style="list-style-type: none"> ● follow procurement policies and procedures; ● create graphs on slide presentations; and ● improve my co-ordination and communication with the rest of the team. 	Mandatory	<ul style="list-style-type: none"> ● get a copy and read through the LSC's procurement guide; ● do the Microsoft Intermediate PowerPoint computer-based training at the Information and Learning Zone (ILZ); and ● get team members' feedback on the way I work with them and keep them informed. 	30 April 2002	<ul style="list-style-type: none"> ● to attend the ILZ for half a day; and ● to receive coaching from Alex on my planned approach to the feedback exercise 	This section is completed after the particular development activity has been carried out

Performance and development plan agreed	
Individual	Date
Manager	Date

Once you and your manager have signed this performance plan, you need to send a copy to your local HR team and give a copy to your manager for their records.

Section 7

Summary

Checklist of important learning points from this module

- PM is not about a system, although that is certainly important in providing a structure and consistency for our people and keeping us on target as an organisation. PM is more about the way we achieve our goals.
- You take responsibility for your performance and development on a day-to-day basis.
- No matter what your role, it is only through your efforts and achievements that we can achieve our goals for the benefit of partners, employees and learners, and the communities in which we operate.
- Performance objectives tell you what you need to achieve to be successful in contributing to your team and local strategic objectives.
- Measures are simply what you and your manager will use to assess how you are doing throughout the year.
- It is impossible to separate the inputs and outcomes of performance and, in reality, objectives and Ways of Working are not two separate things.
- While your manager has a responsibility to provide you with development opportunities and support, it is up to you to take the opportunities on offer and make the most of them.

Self-assessment questions

You can use these questions to check your understanding of what has been covered in this module.

1 Who is responsible for what in our new PM system?

2 What is agreed during a performance-planning meeting?

3 What is the difference between tasks and C-SMART performance objectives?

4 What are effective performance measures?

5 What is the difference between the three 'levels' of our Ways of Working?

6 What part do you play in the development planning process?

Notes

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