

**REVISED DOCUMENTATION FOR THE PERFORMANCE
PLAN AND PERSONAL REVIEW FOR STAFF IN THE
EXECUTIVE AND SENIOR MANAGEMENT COHORTS**

CEL (2009) 12

24 April 2009

1. Summary

1.1 This letter announces an amendment to the documentation for the Performance Plan and Personal Review that was issued with [HDL \(2007\) 15](#).

1.2 The new documentation should be introduced in full from the beginning of the performance year 2009/10.

Yours sincerely

Dr Ingrid Clayden
Interim Director of Workforce

Addressees

For action

Chairs and Chief Executives of Health Boards, NHS National Services Scotland, State Hospital Board for Scotland, NHS Health Scotland, NHS Education Scotland, Scottish Ambulance Service, NHS Quality improvement Scotland, NHS 24, National Waiting Times Centre Board.

For information

Members of the NHSScotland Scottish Partnership Forum and Local Partnership Forums

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NATIONAL HEALTH SERVICE (SCOTLAND)

DIRECTION FOR PERFORMANCE MANAGEMENT ARRANGEMENTS FOR STAFF IN THE EXECUTIVE COHORT

1. The Scottish Ministers in exercise of powers conferred on them by section 105(7) of, and paragraph 5 of Schedule 1, paragraph 7 of Schedule 5 and paragraph 6(1) of Schedule 7A to the National Health Service (Scotland) Act 1978 (as amended) hereby give the following direction.
2. This Direction may be cited as the “Revised documentation for the Performance Plan and Personal Review for staff in the Executive and Senior Management cohorts”, and is given to NHS Boards, NHS National Services Scotland, the State Hospital Board for Scotland, NHS Health Scotland, NHS Quality Improvement Scotland, Scottish Ambulance Service, NHS Education for Scotland, NHS 24 and the National Waiting Times Centre Board, hereinafter referred to as “employing authorities”.
3. Employing authorities should comply the requirements set out in this letter and it’s Annex.

DR INGRID CLAYDEN

Interim Director for Health Workforce
On behalf of Scottish Ministers
The Scottish Government
1E.03,
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24 April 2009

PERFORMANCE PLAN AND PERSONAL REVIEW

1. The Performance Plan and Personal Review document is part of the performance management process which should be conducted in a systematic manner with the Personal Development Plan and Summary documents.
2. The National Performance Management Committee (NPMC) has recommended a revised Performance Plan and Personal Review document to be used for all staff on the Executive and Senior Management cohorts. Boxes 5 and 6 have been introduced on the recommendation of ensuring the NPMC have a clear and detailed understanding of the Achievement Rating given for each objective.
3. The completed documentation should be retained on file for audit purposes and may be requested by NPMC in individual cases.
4. The Personal Development Plan and Summary documents remain as detailed in [HDL\(2007\)15](#).

NHS SCOTLAND - PERFORMANCE PLANNING AND PERSONAL DEVELOPMENT SYSTEM

Performance Plan and Personal Review - Document 1

Page ___ of ___

Name:

Designation:

<p>1. Objective no. _____ of _____</p> <p>Supports corporate objective(s) _____</p>		
<p>2. Agreed outcomes (including timescales)</p>	<p>3. Actions</p>	<p>4. Personal progress review (to be completed for review meetings)</p>
<p>5. Reviewers Comments on reasons for achievement rating</p>	<p>6. Achievement Rating (1,2,3, 4 or 5)</p>	<p>7. Weighting:</p>