|  |  |
| --- | --- |
| PCC/PARISH LOGO | **PCC/PARISH NAME**  **New Role Performance Review**  **Wellbeing and Objectives Review form** |

**BD21328_**

**EMPLOYEE INFORMATION**

It is standard practice at the PCC/PARISH to review an employee’s performance on a regular basis, particularly when starting a new role.

The purpose of this document is to set initial objectives and expectations for the first six months of your new role, and provide you with written feedback and to ensure that you have the necessary support and training to enable you to be successful and happy in your new role.

Your first meeting will be part of your initial induction into the new role with your new line manager. Any objectives or expectations of your role covering the first six months of your new role will be discussed at this meeting, including any concerns, queries or training questions that you have.

Each meeting after this will be to discuss your experience so far, your wellbeing, how well you feel you are achieving to date, to review your objectives and expectations, and to look at any further support or training needs that you have.

**Employee Name:**

**Job Title:**

**Line Manager’s Name:**

**Date of each review meeting:**

|  |  |
| --- | --- |
| **Month** | **Date of meeting** |
| New role Induction meeting |  |
| End of 1st month |  |
| End of 3rd month |  |
| End of 6th month |  |

**New Role Induction meeting**

|  |
| --- |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** |
|  |
| **Discussion on the Line Manager’s expectations of the employee during the first six months in post** |
|  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1) Objectives and Expectations**  Any objectives and expectations that are set should be SMART (Specific, Measurable, Achievable, Realistic, Timely) written so that they specify a measurable outcome, that is achievable and relevant to your post, and can be achieved in your first 6 months in your new role. | | | | |
| **Objectives/ Expectations** | **Key actions/ Training to be undertaken** | **Review at end of month 1** | **Review at end of month 3** | **Review at end of 6 months** |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |
|  |  |  |  |  |

**End of 1st month in new role**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
|  | | | | |
| **Feedback from the Line Manager on the successes and achievements of the employee’s first month** | | | | |
|  | | | | |
| **Discussion on where any additional support and/or training may be needed** | | | | |
|  | | | | |
| **Any additional comments from the employee** | | | | |
|  | | | | |
| **Any additional comments from the line manager** | | | | |
|  | | | | |

**End of 3rd month in new role**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
|  | | | | |
| **Feedback from the Line Manager on the successes and achievements of the employee’s third month** | | | | |
|  | | | | |
| **Discussion on where any additional support and/or training may be needed** | | | | |
|  | | | | |
| **Any additional comments from the employee** | | | | |
|  | | | | |
| **Any additional comments from the line manager** | | | | |
|  | | | | |

**End of 6th month in new role**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **1) Employee to complete**  **Please use this scale to score your overall assessment of your job satisfaction/wellbeing/morale so far taking into account things like health and work/life balance and explain your reason for this score.** | | | | |
| 1 (Very Poor) | 2 | 3 (OK) | 4 | 5 (Very Good) |
| **Discussion on how the employee is feeling about the role, and any concerns or worries** | | | | |
|  | | | | |
| **Feedback from the Line Manager:**   * **Has the employee met the objectives and expectations of the role?** * **Have any further actions/training needs been identified to assist the employee in their new role?** | | | | |
|  | | | | |
| **Any additional comments from the employee** | | | | |
|  | | | | |
| **Any additional comments from the line manager** | | | | |
|  | | | | |