

Form 5 – personal and organisational effectiveness

The aim of this form is to describe your effectiveness on a personal level and within the NHS organisation where you work, with a view to informing job plan review. For example:

- the contribution you make to the development of services
- the delivery of service outcomes
- your identification of the resources needed to improve personal effectiveness.

The appraiser should prepare workload summary with the appraisee.

Examples of documentation which may be appropriate:

- agreed service-related objectives and work programme (if not included elsewhere)
- relevant comparative performance data
- any advice from the appropriate royal college, faculty or specialty association on workload or productivity
- nationally or locally agreed comparators or performance standards
- current available waiting list data
- any local policies, goals or service standards which influence or affect performance
- a note of any difficulties you may have had in obtaining your entitlements to annual leave, leave in lieu of bank holidays worked and free time when not on leave and appropriate staff to cover such absences
- a note of any changes in the job plan proposed either by the appraisee or the appraiser (but other changes may, of course, emerge during the discussion)

Documents listed here may be introduced into the discussion by either the appraisee or the appraiser.

List documents here: 1. 2. 3. 4. 5. etc
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The appraiser should record any points of agreement or concern not covered elsewhere, for example, specific to service objectives and any other agreed action not included in the personal development plan.

Appraiser

Appraisee

Date