



# 8.1 HSE Template Form – Performance Achievement

## 1.0 PERFORMANCE ACHIEVEMENT FORM

This revised Performance Achievement Template is being rolled out throughout the HSE and Section 38 agencies. The focus of this process is to assist a staff member and their line manager to openly discuss goals and personal learning and development in a structured way over the course of a year. The Performance Achievement process allows you to meet with your line manager to discuss the work you do, supports you to develop in your role and enhance the work of your team. It also allows us to collectively meet the objectives of the HSE for our population.

Please refer to the [supporting documentation](#) for assistance in completing the process.

## 2.0 STAFF MEMBER DETAILS

<b>Staff Member Name:</b>		<b>Line Manager Name:</b>	
<b>Staff Member Job Title:</b>		<b>Line Manager Employee ID:</b>	
<b>Staff Member Employee ID:</b>		<b>Date of Initial Meeting:</b>	
<b>Department:</b>		<b>Date of Mid-Year Review:</b>	
<b>Review Period:</b>		<b>Date of Final Review:</b>	

## 3.0 ROLE OBJECTIVE AND PURPOSE

What is the purpose of my role and how does it link to the strategic objectives as set out in the HSE Corporate Plan, National Service Plan, Operational Plans, and other publications relevant to the role, e.g. Sláintecare? Do I understand my role and the value of my job to the health system? Do I enjoy my role and feel I add value to the team/organisation?

<b>What is the purpose of my job within the team?</b>						
<b>How well do I understand my role and responsibilities?</b>	On a scale of 1 to 5 from not very well (1) to very well (5)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<b>How satisfied am I with how my job is structured?</b>	On a scale of 1 to 5 from not very well (1) to very well (5)	1 <input type="checkbox"/>	2 <input type="checkbox"/>	3 <input type="checkbox"/>	4 <input type="checkbox"/>	5 <input type="checkbox"/>
<b>What (if anything specific) would I like to discuss about my role?</b>						

## 4.0 CHECK-LIST BEFORE INITIAL MEETING

The below list outlines important steps that should be followed prior to the Performance Achievement meeting taking place.

<b>Have I reviewed any documentation relevant to my role for example job specification, corporate plans (including the HSE Corporate Plan 2021-2024, the HSE National Service Plan 2023, and the Sláintecare Action Plan 2023)?</b>	Yes <input type="checkbox"/> / No <input type="checkbox"/>
<b>Have I visited the <a href="#">Performance Achievement Hub</a> and completed all relevant <a href="#">HSeLanD</a> webinars on Performance Achievement (“Why and What is Performance Achievement?” and “Setting Performance Achievement Objectives”)?</b>	Yes <input type="checkbox"/> / No <input type="checkbox"/>
<b>Have I considered a number of goals, the associated competencies and steps to complete (including potential supports required) for discussion with my line manager. Goals define what you will focus on and should be SMART (specific, measureable, achievable, realistic and time specific).</b>	Yes <input type="checkbox"/> / No <input type="checkbox"/>

**5.0 OBJECTIVES DETAILS**

Goal/Objective Settings		Comments & Observations [Initial Meeting, Mid-Year Review & End-Year Review]	Evaluate Goal Progress					
Describe what I intend to achieve and the steps I intend to take. Goals/Objectives should be realistic and achievable but also should be challenging and promote a growth mind-set. (Additional objectives can be added as required).		How will the achievement of the goal be measured? How does the goal link to our Health Service Values and organisational objectives? What is the target date for completion? What supports will I require to achieve my goal? How am I progressing in achieving my goals throughout the annual PA cycle?	Mid-Year Meeting			Final Meeting		
			A	EA	NA	A	EA	NA
Objective 1	Initial Performance Achievement Meeting							
	Mid-Year Review Meeting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	End-Year Review Meeting					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Objective 2	Initial Performance Achievement Meeting							
	Mid-Year Review Meeting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	End-Year Review Meeting					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Objective 3	Initial Performance Achievement Meeting							
	Mid-Year Review Meeting		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>			
	End-Year Review Meeting					<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**6.0 CAREER DEVELOPMENT (SHORT TERM/LONG TERM)**

In advance of the Initial PA Meeting, all staff are encouraged to think about their career development and consider learning objectives that will support the delivery of their current role as well as future ambitions. What are my learning needs to enhance my current skills and capabilities? Following the Initial PA Meeting, the Line Manager should summarise the main discussion points about the staff members short-term to long-term career planning aspirations below.

**Staff Member's Initial Consideration (completed pre meeting)**

**Line Manager's Collaborative Summary (completed post meeting)**

**7.0 LEARNING AND DEVELOPMENT PLAN**

This section should be reviewed at each meeting. What are my learning needs to improve role delivery, job satisfaction and organisational performance? Are there any gaps between my current knowledge, skills and experience and the level needed to perform my role or improve organisational performance? What Actions do I need to take to meet this learning need/competency? Competencies represent the "soft skills" necessary to succeed in your role and work hand in hand with the technical ability and knowledge requirement of your role, for example Problem Solving, Decision Making, Communication, Team Working, Time Management.

Competency/Learning Need	Action Description	Intended Outcome	Target Date	Completed	Associated Goal/Objective	Date Agreed <small>[align to review date]</small>
			00/00/2024	00/00/2024	i.e. Objective 3	00/00/2024

**8.0 COMMENTS AND OBSERVATIONS**

This section allows comments and observations arising from Performance Achievement discussions (positive and constructive) from staff members and their managers (linked to Section 5.0 Objectives Details) at the Initial Performance Achievement Meeting, Mid-Year Review Meeting, and End-Year Review Meeting.

**Initial Performance Achievement Meeting (General Comments)**

**Jobholder's self-assessment:**

**Manager's self-assessment:**

**Mid-Year Review Meeting (General Comments)**

**Jobholder's self-assessment:**

**Manager's self-assessment:**

**End-Year Review Meeting (General Comments)**

**Jobholder's self-assessment:**

**Manager's self-assessment:**

**End-Year Evaluation:**

Satisfactory

Unsatisfactory

**Do you wish to have a further discussion with your second tier manager/moderator?**

Yes

No

**Staff Member Signature:**

\_\_\_\_\_

**Date:**

\_\_\_\_\_

**Manager Signature:**

\_\_\_\_\_

**Date:**

\_\_\_\_\_