

This assessment should be agreed between jobholder and manager and take place in May/June as an input to the August pay review. Whilst it is likely there will be a correlation between the job holder's most recent KPI assessment and the 'Whole Job' one, there are several other factors to be taken into account when determining Whole Job performance, all of which should be considered, as follows: -

- ◆ All aspects of the job covered in the job description (i.e. not just those parts of the job covered by the KPIs), including any additional responsibilities such as those relating to project work or activities outside the normal scope of the role.
- ◆ Behavioural aspects – i.e. 'the how'. This can include personal qualities demonstrated, such as attitude, commitment, reliability etc; it may also include Values, where these have been defined.
- ◆ Any changes in performance levels since the KPIs were scored.
- ◆ Special circumstances that affected the level of achievement in the role this year, e.g. an individual may have been asked to cover parts of someone else's job which adversely affected their own performance, long term sick, etc.

The intention therefore is to assess what an individual has contributed on all aspects of their work, including looking at 'the how' as well as 'the what'. Based on assessment of all of these factors, you should agree and produce a rating category from the table below and enter this on the form to be provided each year by the HR Department.

Given that it is likely there will be a strong correlation between the job holders most recent KPI assessment and the 'Whole Job' one, for your reference, the table below shows the likely link between KPI scores / descriptors and the performance descriptors.

| Whole Job Category | Definition | Latest KPI score /Descriptor |
|---------------------|--|--|
| Outstanding | Consistently performs at a very high level – probably applies to only 5-10% of employees | 4.0 and above Stretch |
| Exceeds | Consistently performs at a high level – but room for some improvement | 3.5 – 3.9 Nearly achieving Stretch |
| Exceeds / Achieves | Achieves performance standards in most aspects of job and exceeds them in some | 3.0 – 3.4 Exceeding Business as Usual |
| Achieves | Meets performance standards in most parts of job – areas of under and over achievement tend to balance out | 2.0 – 2.9 Business as Usual |
| Partly | Still some way to go before fully competent in the job | 1.0 – 1.9 Progressing towards achieving Business as Usual |
| Fail / Unclassified | Either significant performance problems (which are being addressed), or, too soon to judge | 1.0 and below Fail |