

Manager Guidance – My Journey

My Journey

The 'My Journey' conversation is an opportunity to summarise and review the year, what has gone well, what could have been even better and what the key learning points are, it could also be used to consider future career aspirations. We understand that not everyone wants to be the Chief Exec but we all have personal aspirations and career ambitions and the great news is that the Council is a fantastically diverse organisation with around 800 different roles, so whether you want to be even better in your current role, are thinking about a sideways move, are gearing towards a promotion or thinking about moving on or retiring, we'll aim to support you with your plans.

With that in mind and whilst the conversation will be an ongoing one, it's good practice to catch up at least once a year to see where we all are career wise, where we are on our talent grid and to discuss what, if any, development needs there may be.

There are 8 questions for the employee to complete and 7 questions in the manager section which are mostly multiple choice. Each question within the form has a purpose and will enable us to pull down and analyse information, which will enable us future proof the workforce. The form is designed to guide and help initiate quality My Journey conversations between employees and their managers.

Organise the meeting

The first step of the 'My Journey' is to schedule a meeting with your team member. You should try to give them at least two weeks' notice so that they have time to complete their form in advance.

Your team member should complete their form ideally a week (but at least 48 hours) in advance of the meeting.

Where you will find the completed form on MYHR

The employee will complete their section and you as their manager will be alerted to their completion in y. You will then be able to review the employee responses and complete the manager section of the form as preparation for your meeting.

Preparing for the meeting

The most important part of 'My Journey' is having an effective conversation with your team member. The best way to do this is to make sure that you are prepared.

To prepare for the meeting you should make sure you have reviewed the answers, taken note of the information that you have been given and prepare points of conversation to make sure you cover all the important points.

There is supporting documentation, which you should refer to, to help, in the links section at the top of the form.

Appraisal Form



Post Details

Post Details

Looking Back

Useful documents include:

Managers Guide to having Conversations – this will give you general tips around how to get the most out of any conversation.

Managing and developing people our way – this is a simple guide to outline how development will work going forward and how we have split the previous PDR process into ‘My Journey’ and ‘On Track Talks.

Talent Toolkit explains the Talent grid and will allow you to consider in advance of the conversation where your team member currently sits and any reasons behind this to aid your discussions.

Having the meeting

Q9 Does the employee have current objectives?

Why? Target setting should not form part of this meeting, but it is vital that every employee knows what is expected of them in their role and what they are working towards throughout the year, how they are contributing to the Council’s overall objectives and how they fit within the grand scheme. Setting objectives and targets allows this clarity and therefore this question enables us to analyse whether everyone who should have objectives and targets does and then dependant on the answers will allow for discussion within departments, where needed.

Q10 Have you been having regular 1:1s?

1:1’s come in many forms but essentially have you been having discussions regularly with your individuals to discuss expectations, progress, achievements, concerns and wellbeing – whether that be daily discussions and check ins or more scheduled meetings.

Does your answer match that of your employee? If not, this will need further exploration in your My Journey discussion to establish whether you each have the same definition of a 1:1 and whether changes need to be made to how they are set up now, what works best for the both of you.

Q11 Considering the last 12 months, which of the below best reflects current performance, aspirations, and potential on our talent grid?

You should not consider the selection the employee has made while making your own selection.

In your preparation you should have considered the employee’s performance and potential based on the grid, where do you believe that the employee sits within the grid, make sure to have some worked examples as you will need to be prepared to discuss your decision and why you have come to it during the My Journey meeting.

Review the talent toolkit which can be found [here](#) [web page] to ensure understanding of each of the positions on the grid.

Q12 If your views on the grid are different, have you discussed this with them?

If you do not agree with the employee's selection on the grid you must consider why specifically and be in a position to discuss your thoughts with the employee.

You should ask the employee to talk through their selection asking for detail and this will form the basis of your discussions as to where you have selected – the aim of this discussion is to be open to hear both views so that you can come hopefully to an agreement of understanding of where you both believe the employee is positioned in the grid and why, with potentially a plan to progress to another position, if applicable.

Q13 For those looking to progress, have you, or do you intend to complete a development plan for this person?

If your employee is identified as one of the development options in the grid or has identified that they have areas of development or training that they wish to explore you should have those discussions with them, you should consider whether the development will benefit the role or the team, budget and time constraints.

The development can be about the person but it should have consideration of the role they do, so for example, if you have a support assistant requesting to complete their HGV licence, it is fair to explore the reasons why and whether the development would benefit them in their role during their My Journey discussion, asking questions such as, what, if anything, they have done to explore this wish outside of the Council – what are their ambitions with completing the course?

It may not always be the case that training or development is agreed and therefore there can be times where you would answer no or not applicable but serious consideration should be given to all requests to develop and progress.

Q14 Please provide any general comments on the achievements and performance from last year

This is your opportunity to make notes on performance and achievements, take your time to shout out the areas of achievement – review back over your On Track talks throughout the year and talk about the challenges – what has been overcome, areas that are still in progress and what have been the stand outs from this year. It's always nice to hear feedback and have that round up at the end of the year.

You should discuss in more detail in the My Journey meeting but a summary should be captured here as a record for both you and the employee.

Final thoughts

Q15 Please summarise conversation regarding career aspirations, development, and performance, including approximate time scales where applicable and reason for change.

Why? – this enables you to give a brief summary of what was discussed in the My Journey meeting with your employee.

Did you both select the same talent grid position? Did you come to the same selection based on the same points of consideration, what were the reasons you both selected what you did and why? If you had different reasons, what were they? And have either of you changed your view or reasons for the selection?

What was discussed with regards the career aspirations for the next 3 years, for example, if they are looking to reduce or increase hours what did this look like for them and has a formal request been made – timescales on when this is being considered? Is the person looking to retire? Do they have

any specific plans in place currently or do they need any support in planning for this? If the plans are in the short term, the next 12 months? You can discuss any plans that may be required such as coaching a replacement, if applicable.

How do you feel about the performance in the last year, what feedback was discussed?

Did anything else come up that it would be good to note down. We are really hoping the conversation isn't only driven by the form and if it is flowing naturally there is a high chance there will be other points to note down.

You can include any agreed actions for yourself or your manager and the timescales you have given, such as:

Action: Research and review apprenticeship options for X within the next month, update to be given in February On Track Talk

Review Save and Submit

You can save your answers as you go and if you get interrupted or need to come back to finish the form you can press save and resume later. Once you have completed all the questions, reviewed your answers and you are comfortable to press **submit**.

13. For those looking to progress, have you, or do you intend to complete a development plan for this person?

Yes

No

Not applicable

14. Please provide any general comments on the achievements and performance from last year (character limit 1000)

15. Please summarise conversation regarding career aspirations, development and performance, including approximate timescales where applicable and reason for change (2000 character limit)

Clear Download Save Submit ✓

This will then go back to the employee to review and submit; the form will then be uploaded.

You will then need to log the form in “My Appraisals/PDRs” section in MYHR, as you would do currently, this is being looked at and we are hoping will not be necessary by the time the process goes live.

This completes the My Journey process; you should continue to review all discussion points and development actions as part of your On Track talks throughout the year.