



Council Overview & Scrutiny Committee  
17 April 2013

**Appraisal Data – Position Statement**

**Purpose of the report:** Scrutiny of Services

To provide an update on progress with logging completion rates for the People Strategy promise that 'Everyone will have an annual appraisal'.

**Introduction:**

1. This report provides an update on current statistics of appraisal completion for eligible employees across the organisation.
2. Data is being collected following the design and implementation of an interim process as the SAP system is not designed to automatically report and collect this data. We are working on adaptations to SAP in this regard.
3. The interim process was trialled successfully in Adult Social Care during January 2013. As a result the bulk of data for ASC had already been collected and only requires updating.

**Interim process**

4. The Organisational Management (OM) structure was used to create a list of all line managers and their direct reports across the organisation.
5. Pre-filled templates were sent directly to line managers who were asked to complete the following information for each member of staff:
  - a) Date of appraisal (compulsory)
  - b) Name of person who completed the appraisal (compulsory)
  - c) Payroll number of person who completed the appraisal (compulsory)
6. Line managers were given 3 weeks to complete the information and return to a central point. Paragraph 9 shows a breakdown of completion rates to date.
7. Data is currently being collated, cleansed of errors, uploaded onto the SAP system and combined with existing data on SAP. Managers who have not yet responded are being contacted as a reminder to complete the data.

8. Reports on level of appraisal completion will then be pulled from SAP and combined with workforce information to give results on levels of appraisal completion for all eligible staff.

<b>Appraisal reporting completion</b>
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9. The mid-exercise return rates are shown by directorate below. This is not a full account of the end result; rather it represents the position at 5 April 2013.

This shows the number and percentage of managers who have completed the logging exercise. It does not show the number or percentage of appraisals completed.

Directorate	No Managers	Responded	% Completed
CEO	57	39	68
CC	203	169	83
CSF	456	279	61
CE	189	137	72
E&I	133	109	82
Total	1038	733	71

10. The reporting on this data will be completed and ready to report to in June. This reflects the appraisal cycle followed by a large proportion of the organisation where appraisals are conducted around April – May.

<b>Conclusions:</b>
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11. The process used is manual and requires staff resource to run, but is useful in confirming the annual appraisal cycle, which is currently not possible through our computer reporting systems.
12. A range of delivery options for an automated system are being considered, until a suitable solution has been found the manual logging process will continue to provide this information.

**Financial and value for money implications**

13. Any additional training on appraisals and promotion of appraisal identified through this project will be met from existing training budgets and planned campaign activities.

**Equalities Implications**

14. None identified.

**Risk Management Implications**

15. None identified.

## Implications for the Council's Priorities

16. This work supports the organisation's commitment to delivering the promises in the People Strategy specifically 'Everyone will have an annual appraisal'.

<b>Recommendations:</b>
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17. It is recommended that a full report on appraisal completion levels by directorate is brought to OSC in June 2013.

<b>Next steps:</b>
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April / May 2013	Collate data from managers across the council
June 2013	Present data to Overview and Scrutiny Committee
March – May 2014	Run appraisal logging project as per 2013
June 2014	Present data to Overview and Scrutiny Committee

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**Report contact:** Carmel Millar, Head of HR & OD, Change & Efficiency

**Contact details:** Carmel Millar/CAE/SCC  
Telephone: 020 8541 9824

**Sources/background papers:** N/A

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