

Policy	Development & Performance Review
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Terms of Reference

EVH Terms & Conditions of Employment
 EVH Good Practice Guides
 ACAS Guides
 Investors In People Guidance



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Introduction

This policy details how the Association will support staff to develop and perform in their employment with the Association.

This Policy utilises some of the information from Employers in Voluntary Housing (EVH) information and guidance notes.

This policy is a result of consultation and discussion with Staff and Committee.

Equality & Diversity

The Association seeks to promote and achieve equality and diversity through the operation of an Equality and Diversity Policy, the requirements of which both in the letter and spirit will apply to this policy.

Purpose

The fundamental reasons for carrying out staff development and performance reviews is to maximise the potential of all employees, individually and as team members, to improve the performance of the Association in achieving its objectives.

It is recognised that a review of individual and team achievements in the context of Job Descriptions and workload, can improve performance through:

- Clarification of an employee's job function and role in the team
- Identification of training needs
- Identification of support needs
- Giving future direction to the job through the identification of objectives
- Building a good relationship between the staff member and manager
- Providing an opportunity for employees to contribute to the organisation's development.

The development and performance review will not be directly related to pay or disciplinary procedures.

Principles

It is recognised that best results will be achieved if the development and performance review process is conducted in an atmosphere of mutual respect.

Working relationships and work performance will be improved if all members of staff know the standards expected for each job and how these can be achieved. Regular interviews will provide an opportunity to review development and performance, review job descriptions, and to consider potential for further training and development where appropriate. The development and

performance review process will assess the overall achievements rather than day to day details. It is inappropriate for the development and performance review process to be used as a mechanism for admonishing or rewarding particular staff, although an open and frank discussion on performance is expected. Any disciplinary issues will be dealt with as they arise in accordance with the disciplinary process and not at development and performance review interviews. Development and performance review meetings will be carried out twice throughout the year, with supplementary one to one meetings in between. The aim of the development and performance review process is to achieve mutual assessment and agreement on the employee's development objectives and needs. The development and performance reviews will look at behaviours/values demonstrated by the employee as well as performance against work plans.

The Employees' Needs

There are a number of basic questions to which individuals need to know the answer and which are not always fully answered in day to day working relationships:

- Who is my manager and to whom am I accountable?
- What is my job and what functions am I expected to perform?
- What standards are expected of me and how will I know I am performing satisfactorily?
- Where do I go from here and what is my potential?
- How do I get there and what training do I need?

The six monthly performance and development review should give employees the opportunity to discuss such matters with their line manager/supervisor and this will also form part of the continuous setting of targets and review process.

The Association's Needs

One of the Association's greatest resources is its staff and it is therefore essential that performance is monitored. A formal six monthly development and performance review does not mean that any manager/supervisor/director and/or the Committee cannot point out and correct poor performance and give praise as and when due. Nevertheless, such a six monthly review does give the specific opportunity to direct attention to staff as individuals and to consider each person's overall performance within their working environment, and their further development and training needs. Information on training needs can be used in planning the Association's training activities and training policies.

The System

The six monthly development and performance review should assess an employee's performance against standards for the job and set goals for future achievement. To be successful, the review must ensure that the individual knows:

- the standard(s) against which he/she is being judged
- that the aim is to develop and improve performance and not criticise destructively
- that review is based on whole performance over a period rather than single incidents
- that he/she has the chance to express his/her views

- that training needs identified and areas where improvement in performance is required, will be discussed and agreed in a training plan
- that a note of matters discussed and agreed action to be taken will be recorded in a suitable form, normally in the personal file and that he/she will see his/her six monthly development and performance review form and record comments in the case of a disagreement
- That the functional manager will ensure that agreed action takes place

The Development & Performance Review Meeting

As with all meetings, the success or failure of a development and performance review meeting will depend largely on the preparation of both parties to the meeting – the reviewer and the job holder. There should always be sufficient time to prepare for the meeting.

The employee and the reviewer should be made aware of all issues for discussion prior to the formal development and performance review meeting. There should be no element of surprise. The Reviewer will provide written comments on the Staff development and performance review form prior to the development and performance review meetings.

The Development & Performance Review Form

The development and performance review form (Appendix 1) should be completed by the job holder and given to the reviewer at least one week before the meeting is due to take place.

The reviewer will complete their sections and return it to the job holder at least 2 days before the meeting.

Additional comments can be added by both parties at the meeting if required/appropriate and the addition agreed by both parties.

Who Reviews Whom

The intentions are that each member of staff has a six monthly development and performance review meeting. The person carrying out the review must have a direct influence over the job holder's work and future, and be capable of implementing any recommendations arising from the review. In practice, supervisors/managers will carry out the review which will in turn be reviewed by the relevant manager/director.

Managers will have their review undertaken by an annual 360 degree staff review and six monthly reviews with the Director.

The Director will have their review undertaken by an annual 360 degree staff & committee review and 6 monthly reviews with the Management Committee staffing sub-committee or office bearers.

Housing Services

Job Post

Assistant Housing Services Officers

Review Meeting With

Housing Services Manager and/or supervising Housing Services Officer

Estate Caretakers

Housing Services Manager and/or supervising Housing Services Officer

Housing Services Officer

Housing Services Manager

Housing Services Manager

Director six monthly & staff 360 annual appraisal

Finance & Corporate Services

Job Post

Finance & Corporate Services Senior Assistant

Review Meeting With

Finance & Corporate Services Officer

Finance & Corporate Services Officer

Director

Director

Office Bearers/Staffing Sub-Committee & staff and committee 360 annual appraisal

Development & Performance Review Meetings

Ideally, a period of no more than 60 minutes should be allocated for each review meeting, although individual line managers/supervisors may find the actual time required varies according to individual staff and the level of seniority and the nature of the person they are conducting the review with. It is important that the time allocated should be kept as clear of interruptions as practical and the interview be carried out in an atmosphere as far removed as possible from the normal problems and pressures associated in the day to day running of the office.

During the review meeting, the line manager/supervisor will add agreed actions and timescales and any other agreed comments on the review form. The completed review form will then be signed by the job holder and reviewer. All completed and signed review forms will then be forwarded to the Director and held in a confidential file.

In the event that a disagreement arises between job holder and line manager/supervisor which cannot be left and/or resolved at that level, the procedure will be;

- (a) reference to the next tiers in staff structure
- (b) when (a) is exhausted, reference to Staffing Sub-Committee and/or Management Committee
- (c) reference to formal grievance procedures involving EVH/Union if still unresolved.

A completed development and performance review form is a confidential document. Development and performance review forms will therefore be kept securely in the employee's personnel file and only the employee, their Manager and the Director will have access. Forms will be destroyed six months after an employee leaves the organisation's employment.

The Management Committee will consider a report from the Director on staff development and performance reviews carried out in respect of all staff. The report will be limited to general conclusions which ensure that the action plans from the development and performance reviews are incorporated in the Association's Training Plan and Internal Management Business Plan as appropriate. The report should also provide the Committee with sufficient information to meet their responsibilities to monitor and evaluate the effectiveness of their policy on development and performance reviews.

It is understood that the Management Committee will not have access to individual staff development and performance review documentation.

Committee members, managers and staff involved in staff development and performance review systems will have undertaken appropriate training.

Competencies

The development and performance review form has a framework for competencies which are compatible with the Association's Aims and Values. The framework may be amended where there is agreement between the line manager/supervisor and member of staff to ensure it is job-relevant, whilst remaining aligned with the aims and values of the Association.

Impact Statement

Failure to carry out staff development and performance review meetings could have an adverse effect on the morale of staff and on their performance. It is therefore seen as good practice that these are carried out.

Delegated Authority

The Director and Line Managers/supervisors will have delegated authority to carry out staff development and performance reviews for staff that they are responsible for.

The Staffing Sub-Committee/Committee Office Bearers will have delegated authority to carry out the Director's development and performance review.

Targets/Timescales

Staff will carry out their six monthly staff development and performance reviews as part of their work plan targets and this will be monitored in line with the internal management planning process.

The Director's review meetings will be schedule for Oct and April.

All other staff member review meetings should be planned in to take place in:

- February
- August

The Development and performance review Form should be completed by the member of staff and passed to the reviewer one week prior to the development and performance review meeting and where appropriate, any final comments will be recorded on the form at least two days prior to the meeting.

The reviewer will complete their sections and return it to the job holder at least 2 days before the meeting.

It could contribute to their professional development for the staff member to complete the form after the review meeting has taken place. The completion of the form post meeting will be agreed between the staff member and their line manager/supervisor, or if no agreement has been reached, the line manager will determine who completes – this being recorded on the form. . Regardless of who completes the form, the contents will be agreed between both parties and the form completed and passed to the Director within two weeks of the meeting.

Monitoring & Review

The Management Committee will receive a general report on development and performance reviews each year.

The Policy will be reviewed at least every three years or earlier if required.