

Performance Review

Overview

Managing staff performance is a continuous process. It involves making sure that the performance of all staff contributes to the Vision and Values of the Association. The aim is to maintain or continuously improve the performance of individual employees and that of the Association as a whole.

Good performance management systems help everyone in the organisation to know:

- how they are doing; and
- their role in helping the business achieve its goals;
- the skills and competences they need to fulfil their role;
- the standards of performance and behaviours required;
- how they can develop their performance;
- what the Association is trying to achieve;
- when there are performance problems and what to do about them.

Performance Review Framework

Performance Review meetings are much easier, and especially more relaxed and productive, if the reviewer meets each of the team members individually and regularly for one-to-one discussion throughout the year.

Meaningful regular discussion about work, career, aims, progress, development, and common interests, makes reviews so much easier because people then know and trust each other - which reduces any stress and uncertainty when things are more formal.

So sit down together and talk as often as you can, and then when the actual formal reviews are due everyone will find the whole process to be far more natural, quick, and easy - and a lot more productive too.

Performance reviews can be considered under three headings:

- **Objectives from Job Description (What you do)** – we all have accountabilities and tasks to achieve
- **Competencies and Behaviours (The way you do it)** – the way in which we work
- **Personal Development (Personal Action Plan)** – the options available to us to develop our performance

When properly managed, performance reviews can contribute to:

- clarifying, defining, redefining priorities and objectives
- motivation through agreeing helpful aims and targets
- motivation through achievement and feedback
- training needs and learning desires
- identification of personal strengths and direction
- delegation, additional responsibilities, employee growth and development

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- team roles clarification and team building
- training needs assessment and analysis for each facility
- resolving confusions and misunderstandings
- manager development - all good managers should be able to conduct staff reviews well

Procedure for Reviewers

When

Select a 2 or 3 week period when you will start and complete all your staff review meetings.

Block off timeslots in your diary within each week for individual meetings, and add time for writing up notes and any follow-up plans afterwards. Allow 45 minutes on average, for each meeting.

Where

Select and book out appropriate space/room to hold the meetings. Ensure privacy and a comfortable setting for one-to-one meetings.

Speak directly with each of your team/employees to arrange a meeting, and offer them a choice of date & time.

What

Issue a blank Performance Review form to each employee, plus a copy of their current job description and confirm the date and time of their meeting. Ensure you prioritise the review meetings as far as you can by not cancelling and/or re-scheduling the meetings once agreed and ensure there are no interruptions unless for emergencies.

Conducting a Review Meeting

Introduction - relax the reviewee - open with a positive statement, smile, be warm and friendly; it's your responsibility to create a calm and non-threatening atmosphere.

Set the scene - simply explain what will happen - encourage a discussion and as much input as possible from the reviewee - tell them it's their meeting not yours.

Confirm the timings, especially finishing time. If helpful and appropriate begin with some general discussion about how things have been going. Ask if there are any additional points to cover and note them down so as to include them when appropriate.

Review and measure

Review the activities, tasks, objectives and achievements one by one, keeping referenced to the information on the current job description - avoid going off on tangents or vague

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unspecific views. You can refer to the main activities in the job description and the person specification which identifies the key skills, attitudes and attributes required for their job.

If something off subject comes up then note it down and say you'll return to it later (and ensure you do). If a point of dispute arises, you must get the facts straightened out before making an important decision or judgement, and if necessary defer to a later date.

Be led by the people about what they love and enjoy, and what they want to develop e.g.:

- Has the past year been good/bad/satisfactory or otherwise for you, and why?
- What do you consider to be your most important achievements of the past year?
- What elements of your job do you find most difficult?
- What elements of your job interest you the most, and least?
- What action could be taken to improve your performance in your current position by you, and your line manager?
- What kind of work or job would you like to be doing in one/two/five years' time?
- What sort of training/experience would benefit you in the next year?
- In light of your current capabilities, and your future personal growth and/or job aspirations, what activities and tasks would you like to focus on during the next year?

When thinking about the employee and the organisation questions which link to our values would be e.g.:

Team – *Working together as one team to the benefit of our customers. To provide a united front and to demonstrate and extend trust in the team.*

- How do you rate the employee's relationships with their fellow employees, manager and customer – can these relationships be improved?

Quality – *We value quality in everything we do from the standard of our product to the level of service we provide. We take pride in making a difference in communities and providing continuous improvement.*

- Do you have any suggestions for ways in which the employee may improve their work performance or the performance of their team?

Open, Honest & Inclusive – *We offer a people focused service that is centred in fairness and integrity. We believe in being open, honest and respectful in everything we do.*

- How has the employee performed at work since their last review?

Ownership – *We expect our staff to take responsibility for their actions and give them the freedom to do their job in a positive working environment.*

- Referring to the objectives agreed at the last review – have these been met did you contribute to these being/not being achieved in any way?

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Innovation – *We seek to ensure we have sustainable housing, fit for future generations, maintained and developed to the highest possible standard.*

- Has any training or development received by the employee in the last 6 months contributed to any improvement in their standard of work performance or benefited the organisation in any other way?
- Does the employee have any training or development needs, which need to be met – what timescale should apply to these needs being met?

Some people do not wish for promotion, but everyone is capable of, and generally benefits from, personal development. Development and growth should be available to all, not just the ambitious. Consider 'whole-person' development and motivation.

Agreed Actions

A **Personal Action Plan** should be agreed with the reviewee, it should take account of:

- the job responsibilities;
- the reviewed strengths and weaknesses, and;
- any career aspirations discussed.

As with any delegated task or agreed objective these must adhere to the SMART rules: Specific – Measurable – Achievable – Relevant - Time-bound.

The objectives can be anything that will benefit the individual, and that the person is happy to commit to.

The plan can be staged if necessary with short, medium and long term objectives, but importantly it must be agreed and realistic.

Discuss and agree as far as is possible (given budgetary and availability) the **Training and Development Support** to be given to help the reviewee meet the agreed objectives.

This is the support required for the reviewee to achieve the objectives, and can include:

- coaching and mentoring by line managers or peers;
- job rotation, secondment and shadowing;
- internal courses and workshops;
- external courses, workshops, conferences, events and seminars;
- distance learning, online learning, blended learning (such as combining instructor-led training with online learning)
- formal education courses;
- development programmes;
- reading, watching videos, RBS Mentor;
- attending meetings;
- workbooks, work instructions, manuals and guides;

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- anything relevant and helpful that will help the person develop towards the standard and agreed task.

Be careful to avoid committing to training expenditure before suitable approval, permission or availability has been confirmed. Raising false hopes is not helpful to the process.

Invite any other points or questions - Make sure you capture any other concerns.

Close positively - Thank the reviewee for their contribution to the meeting and their effort through the year.

Record main points, agreed actions and follow-up - Swiftly follow-up the meeting with all necessary copies and confirmations, and ensure documents are filed and copied to relevant departments.

Any other issues (it's important to offer the opportunity to the reviewee to raise any other points, even if they need to be discussed at another meeting, outside of the performance review process, which would generally be the case.)

Completed forms - Signed forms will be passed on to Chief Executive and a copy will be returned to the reviewee. Confidentiality is very important and documents must be processed and stored in line with the Hjalmland Data Protection Policy.