

## Staff Development and Performance Review Policy

S.02

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20 Sept 2023

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This policy document can be produced in various formats, for instance, in larger print or audio-format; and it can also be translated into other languages, as appropriate.

Our equality and diversity policy statement describes our key equality commitments that we use to develop all organisational services; this includes employment services and services to tenants and other customers.

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

## 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 and to help develop our people in their career.

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 supervisor/manager
- Providing an opportunity for employees to contribute to the organisation's and their own development.

The development and performance review will not be directly related to pay or disciplinary procedures but can feed into performance management matters which could have disciplinary consequences.

## 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 held back for 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 work objectives alongside their 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 regular 1 to 1 meetings (frequency appropriate to, and agreed with, the individual) and 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 achievement 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 or inappropriate performance and give praise as and when due. Nevertheless, 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, previous agreed targets 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, saved 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 supervisor/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 and the job holder will have the opportunity to 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 ideally one week before the meeting is due to take place.

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 a 2 -3 yearly 360 degree staff review and six monthly reviews with the Director.

The Director will have their review undertaken by a 2 – 3 yearly 360 degree staff & committee review and 6 monthly reviews with the Management Committee staffing sub-committee or office bearers.

<b>Position</b>	<b>Meeting normally with</b>
Housing Assistant	Senior Housing Officer and/or Senior Maintenance Officer
Assistant Housing Officers	Senior Housing Officer and/or Senior Maintenance Officer
Housing Officers	Senior Housing Officer
Maintenance Officer	Senior Maintenance Officer
Estate Caretaker	Senior Maintenance Officer
Senior Housing Officer	HSM
Senior Maintenance Officer	HSM

HSM	Director
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<b>Position</b>	<b>Meeting with</b>
Finance & Corporate Services Senior Assistant	Finance & Corporate Services Officer
Finance & Corporate Services Officer	Director
Director	Office Bearers

Development & Performance Review Meetings

Ideally, a period of no more than 2 hours should be allocated for each review meeting, although individual line managers/supervisors may find the actual time required varies according to the individual 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 parties will agree actions and timescales and any other agreed comments for recording on the review form. The job holder will complete the form and agree the final version with their appraiser. The final completed review form will then be signed by the job holder and reviewer. All completed and signed review forms will then be saved in the individuals personnel file.

In the event that a disagreement arises between job holder and supervisor/manager 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 Supervisor/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 plans and business planning processes 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, supervisors/managers and staff involved in staff development and performance review systems will have undertaken appropriate training. Appropriate training could be internally, given by colleagues, or by external training.

**Competencies**

The development and performance review form has a framework for competencies which are compatible with the Association’s Aims, Values and our Behaviours Framework. The framework may be amended where there is agreement between the supervisor/manager and member of staff

to ensure it is job-relevant, whilst remaining aligned with the aims, values and behaviours 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 supervisors/managers 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 scheduled twice yearly – currently June & December.

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

- February and 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.

As it could contribute to their professional development, the job holder will complete the form after the review meeting has taken place and agree the final version with their appraiser. This should be completed within 1 week of the meeting. All completed and signed review forms will then be saved in the individuals personnel file.

## **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.