



## Performance Appraisal (Performance Development Review) Policy

V.4 – August 2019

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SSHC Reference	
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### Related Documents

- Performance Development Review Guidance (<H:\SHARED\argyll\Performance Management>)
- Performance Related Pay Guidance (<H:\SHARED\argyll\Performance Management>)
- Code of Conduct for Staff
- Disciplinary Policy

### **Translation Statement**

If you have any difficulties reading this information or need further help understanding our processes please contact us. We can make this document available in a variety of formats. All you need to do is let us know what you need and we will try to assist.

### **Compliance**

This policy has been drafted to ensure that it complies with current legislation and industry good practice.

### **Equality & Diversity**

Fyne Homes is committed to providing services which embrace diversity and which promote equality of opportunity. As an employer we are also committed to equality and diversity within our workforce. Our goal is to ensure that these commitments, reinforced by our Values, are embedded in our day-to-day working practices.

### **Openness & Confidentiality**

Fyne Homes believes that its members, tenants and other interested parties should have access to information on how it conducts itself. This means that unless information requested is considered commercially sensitive or personally confidential it will be made available on request.

### **Data Protection**

Fyne Homes recognises the importance of data protection legislation, including the General Data Protection Regulation, in protecting the rights of individuals in relation to personal information that we may handle and use about them, whether on computer or in paper format. We will ensure that our practices in the handling and use of personal information during the processes and procedures outlined in this policy comply fully with data protection legislation. More information is available from our Data Protection Officer.

## 1. Introduction

- 1.1. Fyne Homes' policy is that each employee will participate in an annual formal performance appraisal, called a Performance Development Review (PDR).
- 1.2 Conversations on performance should be an integral part of regular meetings with line managers, and if performance is measured quantitatively, employees should open performance conversations happen regularly; whether or not there is also an annual review is secondary.
- 1.3 Broadly, the ideal conditions for effective conversations include:
  - 1.3.1 a culture of trust and openness
  - 1.3.2 people managers who are appropriately skilled, for example in asking good questions and active listening
  - 1.3.4 employees who are receptive, prepared to align with business objectives, learn and take responsibility for their performance.
- 1.4 More specific factors that make for a constructive appraisal are:
  - 1.4.1 a clear purpose – to inform management decisions or employee development
  - 1.4.2 recognition of achievements
  - 1.4.3 genuine two-way conversation and reflection
  - 1.4.4 the whole period is reviewed, not just recent or isolated events
  - 1.4.5 agreed action plans.

## 2. Aim

- 2.1. The aim of this policy is to promote continuous improvement across the organisation and job satisfaction through supporting development and progression.
- 2.2. The benefits of appraisal in terms of improved communication and enhanced performance both for the individual and Fyne Homes will only be achieved by the continuous commitment of all those involved in the scheme
- 2.3. Consequently, Fyne Homes' PDR scheme has been designed to meet the following objectives:
  - 2.3.1. to assist staff in performing their job to the best of their ability, maximising; their job satisfaction and their contribution to the organisational objectives
  - 2.3.2. to identify individual training and development needs
  - 2.3.3. enable regular one-to-one's and coaching and feedback sessions between managers and staff

- 2.3.4. to aim for fairness for all employees across the organisation's performance management model, and
- 2.3.5. to highlight the potential that each individual has to develop within their current or a future position.

### **3. Links to vision and strategic priorities**

- 3.1. This policy aims to fulfil the needs of the Association's Strategic Priorities, in particular: Ensuring staff and committee have the skills, experience and abilities to meet the changing needs, issues and aspirations of customers.
- 3.2. Fyne Homes will do this by recruiting and retaining staff and board members with appropriate skills, experience and commitment to delivering quality services and support.

### **4. Legal framework**

- 4.1. While there is no specific legislation covering performance appraisals, and policy, process or procedure must be open, transparent and not subject to bias.
- 4.2. In particular procedures and policy must not discriminate against any employee because of;
  - 4.2.1. age
  - 4.2.2. gender reassignment
  - 4.2.3. being married or in a civil partnership
  - 4.2.4. being pregnant or on maternity leave
  - 4.2.5. disability
  - 4.2.6. race including colour, nationality, ethnic or national origin
  - 4.2.7. religion or belief
  - 4.2.8. sex
  - 4.2.9. sexual orientation
- 4.3. These characteristics are protected by law under the Equality Act 2010.

### **5. Managing and Reporting**

- 5.1. A report will be made by the Human Resources Director to the senior management team quarterly and annually on completion of the review meetings.
- 5.2. A further summary report to both bodies will be made on the distribution of the ratings and associated pay and bonus allocations. This will be at the Staffing Committee meeting immediately following the end of year appraisal meetings; and at a separate meeting to the senior management team when the scorings and pay/bonus distribution known.

### **6. Process and Procedures**

- 6.1. Performance Development Reviews will be carried out by the job-holder's immediate superior on a one-to-one basis.
- 6.2. Training will be provided to all appraisers prior to conducting their first appraisal interview and on-going coaching if required.

- 6.3. This is a two-way discussion to review performance, support and assist as appropriate where underperformance is identified as well as discussions for future career development and progression.
- 6.4. Detailed guidance and minimum standards for formal meetings for managers and staff is contained at; <H:\SHARED\argyll\Performance Management>
- 6.5. The completed PDR will be viewed as a working document and will be continually referred to and reviewed during the year.
- 6.6. Where the objectives/targets agreed have changed, new objectives/targets should be agreed with input provided by the employee as well as the manager on performance objectives and consult on plans for achieving performance or enhanced performance strategies.
- 6.7. Managers should not wait until the annual PDR to address any underperformance issues with staff. Where underperformance is highlighted, the line manager will look to set objectives with fair and reasonable timeframes for improvement. Alongside an action plan or performance improvement plan may be set in consultation with the member of staff to assist closer supervision and facilitate the opportunity for further one-to-one discussions to track how underperformance is (or is not) being improved.
- 6.8. The manager should also provide training, coaching and feedback or any other relevant further support to aim to assist improving performance as appropriate enabling the employee appropriate time to address.
- 6.9. If no improvement is being made, discussions should be held with Human Resources to consider what further training and support may assist further or if a more formal capability route is required to be taken.

## 7. Reviewing process

- 7.1. This policy will be reviewed in line with the respective current Fyne Homes' policies, and/or where a change in legislation arises.
- 7.2. If there is a procedural delay in the policy revision then the relative legislation in force at the time will prevail.

<b>Version number</b>	<b>Revision Date</b>	<b>Part of doc revised</b>	<b>Reason for revision</b>	<b>Approved by</b>
<b>04</b>	<b>Sept 2019</b>	<b>ALL</b>	<b>Change to FH PDR process</b>	<b>ManComm</b>