

Loreburn Group

Performance Management Policy



Creating Great Places to Live

Policy	Performance Management Policy									
Version Reference	PM.2									
Approved by	MC	X		LET	X		MT			
Date of Approval	March 2021									
Review Period	Every 3 Years or as legislation or substantive changes occur									
Review Date	January 2023									
Review Due	March 2024									
Policy Champion	Head of People & Culture									
Who this policy affects	Staff	X	Customers		Contractors		Members of the Public			
Where this policy affects	General needs		Sheltered		Supported		Offices/staff base	X		

PERFORMANCE MANAGEMENT POLICY

1. Purpose of this Policy

Loreburn's purpose is 'Creating GREAT Places to Live'. Further details regarding our vision and ways of working are described outlined in the Employee Handbook.

2. Aims of this Policy

This Policy aims to set out our approach to performance management in order to meet our Core Values, Strategic Objectives and to fulfil our purpose and vision.

3. Policy Statement

Performance issues should always be addressed at an early stage to ensure full opportunity for matters to be understood and resolved. Legitimate, appropriately conducted monitoring of an employee's behaviour or job performance does not constitute unfair treatment/bullying and instead seeks a collaborative way of working to reach the necessary standards required.

3.1 Loreburn's Responsibilities

Loreburn will:

- Ensure that all employees receive appropriate induction training including new starts, those who have transferred to a different role and those who have been promoted.
- Set performance management objectives for individuals and teams that are in line with Loreburn's aims and objectives, ensuring that all employees understand how performance in their own role impacts on the performance of the organisation as a whole. These objectives will include measurable targets, outcomes and milestones as appropriate.
- Ensure that all employees fully understand their role, the standards that are expected and how performance is measured and reviewed.
- Provide appropriate training so that all employees can fulfil their role, and meet the expected standards which their job demands. This will include a mix of role specific and organisational training activities.
- Closely monitor and support staff during their probationary period ensuring guidance, clarity and additional training as appropriate in order to identify any performance issues at an early stage.
- Ensure that line managers evaluate individual performance through the informal catch up and quarterly PDP meetings with their staff. Such regular meetings should focus on developing the strengths of individuals, as well as addressing their improvement areas through an open and constructive discussion.

- Evaluation of team performance will be reviewed through regular team meetings. Such regular team meetings should focus on developing the strengths of teams, as well as addressing their improvement areas through an open and constructive discussion.
- Identify individual learning and development needs: informally during any discussion with line managers, through informal catch up and quarterly PDP meetings with line managers.
- Identify poor or insufficient performance as early as possible. Line managers will discuss the situation with the individual, leading to the establishment of an Improvement Plan which sets clear, timed, targets which will be monitored in order to demonstrate improvement.
- Discuss poor team performance with team members, at a team meeting. An action plan will be drawn up setting clear, timed, targets which will be monitored to demonstrate the team's improvement.
- Recognise good performance – both individual and team.
- Implement the Disciplinary Policy where poor performance continues following an initial Improvement Plan and no, or insufficient, improvement is seen. This could lead to a formal warning being issued to an employee, or ultimately dismissal of the employee, as per the Disciplinary Policy.

3.2 Line Manager's Responsibilities

It is the responsibility of all Line Managers to ensure that performance management activities are implemented for each of their team members. Any documents related to 1:1 discussions and Individual Reviews should be retained by the manager and copied to the P&C team for inclusion into employee records

3.3 Employee's Responsibilities

All employees are expected to adhere to Loreburn's GREAT Values and conduct themselves in a professional manner. During the course of employment, there may be occasions when performance falls short of the expected standards required. In such circumstance, employees are obliged to work with their line manager to resolve matters at an early stage. We learn, grow and at times have to change to achieve success. Successful performance management therefore requires the buy in of both parties to move forward constructively together.

3.3 The Performance & Development Review System

In the event of performance expectations not being met, and not being addressed via 121 discussions, the Manager will arrange to meet with the member of staff to discuss the areas of concern. A Performance Improvement Plan will be agreed with clear outcomes and timescales. The timescales must allow sufficient time for the individual to demonstrate improvement. The Plan should be submitted to the Head of P&C for sign off.

EXAMPLE PERFORMANCE IMPROVEMENT PLAN (PIP)

PERFORMANCE IMPROVEMENT PLAN

Employee:	Line Manager:
Also present at meeting:	Date of Review:

Relevant documents

- Job Description / Role Profile / Person Specification
- Most recent Performance and Development Review Forms
- Tangible evidence / examples of performance

What is going well and needs to be maintained

Requires Improvement

Observations (of performance or behaviour)	What could be the root cause of the issue?	Standards/Expectations for the future (in progressive stages if required). Make these specific & measurable (SMART)	Support / training required if necessary (and how this will be arranged)	Progress check

Next review date:

Consequences if expectations are not met:

If performance continues to be poor after review meeting 3, formal Disciplinary Procedures will be followed.

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Additional comments by manager:

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Signed:

Date:

Additional comments by employee:

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Signed:

Date:

4. Complaints

Loreburn has a commitment to valuing complaints and ensures the organisation benefits from feedback to identify areas for change or improvement.

Loreburn has a Complaints Policy which ensures there are robust and effective procedures in place for complaints to be properly managed and acted upon.

Anyone dissatisfied with the outcome of their complaint having exhausted Loreburn's complaints procedure has the right to refer the matter to the Scottish Public Services Ombudsman.

5. Equality, Diversity & Inclusion

Loreburn aims to ensure that equality, fairness, dignity and respect are central to the way we work and how we treat our customers. We support diversity and uphold equal opportunities in all areas of our work as an employer and service provider.

Loreburn will not discriminate against tenants, staff, visitors, suppliers or others based on their age, sex, sexual orientation, race, disability, religion or belief, marital status, pregnancy and maternity or gender reassignment (collectively referred to as 'protected characteristics' in the Equality Act 2010).

6. Risk Management

Loreburn has a Risk Management Strategy, Policy and Procedure. These documents set out how the organisation will manage risk as an integral part of its governance and management systems, ensuring risks are identified, evaluated and controlled effectively.

Identifiable risks arising from this policy will be monitored and managed by the internal processes set out herein and by regular review of this and all other associated policies and procedures, ensuring risks are mitigated and Loreburn complies with all legislative requirements and regulatory and best practice guidance.

7. Responsibilities Chart

The below chart illustrates the responsibilities of all staff pertaining to this policy:

Responsibilities	Man. Comm.	CEO	LET	Managers	Assistant Managers	All Employees
Approve Policy	X					
Lead by example in application of Policy	X	X	X	X	X	X
Take proactive steps to resolve issues						X
take ownership of concerns and seek to resolve at an early stage						X

8. Policy Review

The Policy Champion is the Head of People & Culture

The Policy Champion is responsible for completing the Health and Safety Assessment and Equality, Diversity and Inclusion Assessment Checklist.

This policy will be reviewed by the Policy Champion every 3 years or sooner as required due to legislative or regulatory change.

Policy Assessment Checklist

Health & Safety Assessment

Does this policy have the potential to affect:

Lone Working	No
Safety and/or wellbeing of customers	No
Safety and/or wellbeing of customers	No
Have the above items been considered in the preparation of this policy?	YES

Comments:

Equality, Diversity & Inclusion Assessment

Does this policy have the potential to affect:

Staff's rights to equal opportunities	No
Tenants' / Customer's rights to equal opportunities	No
Tenants' / Customer's ability to access to homes and/or services	No
Have the above items been considered in the preparation of this policy?	Yes

Comments:

Agile Working Assessment

Agile working requirements have been considered and addressed in the preparation of this policy: Yes