



Compliance Group

HR Policy

Performance Management

Electrical

Fire

Water

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Approval

The signatures below verify that this policy has been reviewed and accepted and demonstrates that the signatories are aware of all the requirements contained herein and are committed to ensuring their provision.

	Name	Position	Date
Prepared by	Phillipa Clark	HR Advisor	14/04/2023
Approved by	Cally Hickman	Group HR Director	20/04/2023

Amendment Record

This policy is reviewed to ensure its continuing relevance to the systems and process that it describes.

Revision	Document Reference	Changes made	Date
0	Whole document	New document. Document issued at Rev 0.	14/04/2023

The electronic version of this policy is the latest revision. It is the responsibility of the individual to ensure that any paper material is the current revision. The printed version(s) of this document is uncontrolled.

1. Introduction

In CGL all line managers and colleagues work together to plan, monitor and review a colleague's performance to enable them to develop and make a positive contribution to the business. Performance is understood to include meeting standards, working towards performance & development objectives, and consistently demonstrating CGL Values.

Our approach to performance is to use a continuous cycle of agreeing objectives, assessing progress against these, and providing on-going coaching, and feedback to ensure colleagues are inspired to achieve their targets and business plans.

2. Our Approach to Performance Management

The CGL performance management and development framework is based on the following principles:

- Everyone has clear standards and objectives and knows what is expected of them from the outset.
- Performance and development conversations are ongoing and are seen as an integral part of a manager's role.
- Colleagues are expected to demonstrate energy and passion to achieve the best they can; managers are there to support colleagues to achieve their full potential.
- Colleagues are encouraged to contribute to performance and development conversations; their views on how to deliver improved results are valued.
- Improved personal performance needs personal reflection, and regular honest feedback.
- Everyone is entitled to a personal development plan and identifying and actioning development needs is the joint responsibility of the colleague and line manager.
- In situations where colleagues are underperforming, a performance management plan may be implemented to support with the colleague's development and improve performance.
- If there is no improvement after completing a performance management plan, the formal disciplinary process may be considered.

3. Setting Standards

All colleagues should know their performance standards and objectives. Reviewing performance against these is a continuous process that starts on day one. The following documents and processes provide a formal framework to support this.

Job Description

A Job Description contains an outline of the role that a colleague has been employed to undertake and the behaviours that are key to being successful in the role. It is not an exhaustive list of activities and roles can change as new ways of working or activity develop over time. Where this happens line managers will sit down with colleagues and agree and document any changes.

When a colleague accepts a role, they are effectively agreeing to fulfil the requirements contained within this document which then constitutes a performance management contract between the colleague and manager.

One to One Meetings

One to one meeting's are held between a colleague and their manager weekly. This is an informal meeting to discuss the colleague's performance against their KPI's. Any development opportunities and AOB.

Key Performance Indicators (KPIs)

Organisations use KPIs to evaluate their success at reaching targets. Your line manager should share your KPIs with you.

Personal Development Plans

A PDP is used to plan how a colleague will address their key areas of development. This could be centred around:

- Keeping skills & knowledge up to date and enhancing performance in their current role
- Helping them to strengthen/develop new skills /knowledge/behaviours to take on additional responsibility.
- Supporting future career aspirations both long and short term

It is important that colleagues commit to continuously learning new skills to keep pace with our ever-changing business and external markets.

Succession Plans

Talent reviews are used to assess our internal capacity to fill current and future vacancies by reviewing the future potential of managers/colleagues and building succession plans for key roles in the organisation.

In order to be considered for progression managers / colleagues must possess:

- The right skill set or have the ability to develop that skill set.
- The desire and motivation to progress and be able to evidence their commitment to personal development.
- Be achieving in their current role.

4. Reviewing Performance

Once standards, and PDPs have been agreed, performance and development are reviewed and supported during the year.

- informally through 'on the spot' feedback and monthly 1:1 conversations
- formally via bi-annual performance and development reviews

Regular 1:1 conversations and support

Managers will agree with their colleagues how they will work together on a day-to-day basis to ensure adequate communication, support, and feedback. This will be through a combination of:

- 'On the spot' feedback to either praise or develop job performance.
- monthly 1:1 meeting to review progress, plan and prioritise future activities, follow up on learning and check on workload and wellbeing.

Performance Review Meetings

The formal performance review cycle consists of one annual review and one bi-annual update. Informal conversations around performance are regular and ongoing.

Performance is assessed in terms of:

- achieving key deliverables for the role and contributing to the overall business plan
- demonstrating CGL Values
- colleagues are described as 'Exceeding', 'Achieving' or 'Shaping' in the role

All formal conversations are recorded and updated on the citation.

Development Review Meetings

All colleagues have development conversations with their line managers. The formal development review cycle consists of one annual meeting to discuss development needs and construct PDPs and one bi-annual update to review progress and discuss career aspirations and the potential to progress within the organisation. Managers adopt a coaching style of conversation, so development is ongoing and forms part of everyday work. More formal learning interventions are available through online learning, attending one of our internal management development courses and via our external qualifications process.

All PDPS is recorded and updated on Shine our Learning Management System (LMS)

Talent Review Meetings

Two talent review meetings are held within the year. During these reviews Heads of function (HOFs) and Human Resources, Head of Talent.

- Review PDPs and create functional L&D plans which then feed into an annual organisational L&D plan created by Learning & Development
- Identify likely successors for roles playing attention to critical roles and single points of dependency.

5. Dealing with Poor Performance

There are a number of reasons why individuals fail to perform to expected levels. Gaps in performance should be identified at an early stage as a result of agreeing clear standards and objectives that are discussed regularly via feedback and 1 to 1 meeting.

When gaps are identified managers work with colleagues to understand why performance is unsatisfactory and agree between them what can be done to resolve issues.

If performance does not improve on the back of feedback and follow-up support, then a formal meeting will be scheduled to implement a Performance Improvement Plan with the colleague. A note taker will be present, and the colleague is entitled to be accompanied by a colleague or union rep. Meeting notes and PIP will be saved to the colleague's personnel file.

Line managers offer support and review progress weekly and monthly to support colleagues to meet the standards and objectives outlined in the PIP. However, if performance is still not back on track after 12 weeks disciplinary action under the capability process may follow.

6. Record Keeping

Records of one-to-one meetings will be sent to HR and saved on the colleagues file for a rolling 12-month period.

Records of Formal and informal meetings will be kept on colleagues' files for 12 months.

CGL commits to abide by the General Data Protection Regulations in relation to confidentiality of data. Only records that both you and your manager have shared will be kept on your record. These may include your performance and development reviews, PDPs and PIPs.



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