

1.0 Policy Purpose

- 1.1 The purpose of the Managing Performance Policy and Procedure is to explain SBHA's approach towards managing people's performance and provide a framework for resolving any issues, ideally through the improvement of performance.
- 1.2 SBHA encourages and expects everyone to work to high standards and make a positive contribution to the performance of the Association. These standards are not static; they will be reviewed and changed through the normal process of continuous improvement. Line managers should recognise and reinforce good performance.
- 1.3 This policy and associated procedure should be used when an individual's performance has been identified as falling below an acceptable level.
- 1.4 Where poor performance is believed to be the result of deliberate negligence, or where serious errors have been made by the individual to the detriment of the organisation, the Association may decide to use the Disciplinary Policy and Procedure instead.
- 1.5 The principles outlined in this Policy, and the related procedures/guidance, apply to everyone in SBHA.
- 1.5 This Policy does not apply to managing attendance; please refer to the Maximising Attendance Policy and Procedure.

2.0 Definition

- 3.1 Capability refers to a person's ability to perform their work.
- 3.2 Performance refers to the way in which an individual undertakes work to achieve tasks and objectives.
- 3.3 An individual must demonstrate levels of both capability and performance at a standard which is satisfactory to SBHA and this will be determined by reference to their skills, behaviours, qualifications, competence, aptitude, health or any physical or mental impairment.

3.0 Principles

- 3.1 Line managers will ensure that their team members understand the standards expected of them and that changes are communicated clearly.
- 3.2 Line managers will establish the facts, with examples, and discuss with the individual to jointly identify action.
- 3.3 Individuals will be assisted to improve and maintain a satisfactory standard of performance and will be given a reasonable time to show an improvement.

3.4 It is important that action is taken quickly once a problem has been identified. If it is not there can be a detrimental effect on service levels and other colleagues.

3.5 If, after the individual has been given support and time to improve, they fail to meet acceptable standards through the informal procedure, the formal procedure will be used.

4.0 Responsibilities

4.1 Everyone is expected to:

- (a) Perform the tasks and responsibilities of their role to the best of their ability demonstrating SBHA's values;
- (b) Achieve the standards required by SBHA and the Department/Section in which they work;
- (c) Advise their Line Manager if the standards are not clear;
- (d) Inform their Line Manager if they:
 - are concerned about their ability to effectively perform their job for any reason;
 - require learning or development to enable them to fulfil the requirements of their role; or
 - need clarification of the requirements applicable to them in their job;
- (e) Agree and implement action to address problems;
- (f) Everyone must actively participate in SBHA's Development Review Process, which includes objective setting and personal development planning.

4.2 For Line Managers, it is part of their normal responsibility to:

- (a) Ensure all new starters receive a proper induction
- (b) Ensure everyone has received initial and ongoing job training and that their learning and development needs are reassessed following job changes;
- (c) Ensure that their team know and understand the standard of work that is expected of them and arrange training as required;
- (d) Ensure the volume of work is reasonable;
- (e) Monitor work output and quality;
- (f) Ensure all Job Descriptions are reviewed annually as part of the Development Review process.

- (g) Discuss concerns with individuals at the earliest opportunity;
- (h) Agree and implement action to address concerns;
- (i) Consider and initiate further action if poor performance continues;
- (j) Ensure everyone is kept informed of their progress in meeting the required standards via one to one meetings and the Development Review process;
- (k) Consider reasonable adjustments, if required, in the case of people with a disability;
- (l) Ensure performance issues are dealt with swiftly and appropriately.

4.4 Human Resources have a responsibility to:

- (a) Proactively advise, support and guide all team members and Line Managers in the policy and procedure;
- (b) Be available to discuss particularly sensitive issues that arise during the process;
- (c) Seek to ensure fairness and consistency throughout the organisation;
- (d) Be present at all formal meetings;
- (e) Adhere to the timescales given within this procedure wherever possible;
- (f) Ensure that hearings are convened and conducted in accordance with the provisions contained within the procedure;
- (g) Retain any records relating to performance hearings in accordance with GDPR;
- (h) Develop the skills of Line Managers and union representatives to allow this policy and procedure to be put into practice effectively; and
- (i) Monitor the use of the Policy and Procedure.

4.5 Union Representatives: Each union representative has the responsibility to:

- (a) Make themselves familiar with the Policy and Procedure;
- (b) Represent people fairly and in line with the policy and procedure;
- (c) Work positively to, where possible, resolve the issues in a constructive fashion; and

- (d) Act at all times in line with their responsibilities under the Recognition Agreement.

5.0 Health Related Issues

- 5.1 Where there is an issue of performance identified with an individual, it is important for his/her line manager to try to identify the reasons for the lack of performance. One issue which should be explored is whether there is any health-related reason for the poor performance.
- 5.2 The issue of health should be raised with the individual, by the appropriate line manager, normally at the informal stage or by the first formal managing performance meeting. If there is a concern that performance issues are related to medical reasons, the line manager should refer the individual to the Occupational Health Service to identify whether they have any underlying health issues which are significantly affecting performance.
- 5.3 The process of referral to Occupational Health should take place in parallel with the managing performance process and not delay meetings or review periods.

6.0 Equality, diversity and inclusion

As an equal opportunities employer, Scottish Borders Housing Association is committed to fair treatment and does not condone discrimination on the basis of age, disability, sex, sexual orientation, pregnancy and maternity, race or ethnicity, religion or belief, gender identity, or marriage and civil partnership. This policy will be applied in line with this commitment.

7.0 Monitoring and Review

- 7.1 This policy does not form part of your contract of employment and can be amended at any time. We may also vary the processes within this policy, including any time limits, as appropriate in any case.

We will regularly review this policy, at least every three years, with regard to:-

- Applicable legislation, rules, regulations and guidance
- Changes in the organisation
- Continued best practice

8.0 Related Policies and Procedures

- Maximising Attendance Policy and Procedure
- Disciplinary Policy and Procedure