

Staff Support and Appraisal Policy

LGEC seeks to ensure that all staff feel supported in their work and have regular structured meetings with their line manager to discuss any issues that may arise. LGEC is committed to the continued professional development of all staff members and to support staff members to reflect on their work, learning and their own professional development needs through a structured approach.

At LGEC such meetings fall into three different categories:

1. Appraisal Meetings
2. Project Management Meetings
3. Support and Supervision Meetings

1. Appraisal Meetings

Purpose

The LGEC Appraisal process provides for every employee to be appraised at regular intervals throughout their employment by LGEC. Appraisal meetings allow for a structured exchange of views relating to the post between employees and their line managers. Appraisals are a way of ensuring that each member of staff has the opportunity to:

- Review their progress, development and achievements on a regular basis
- Identify areas where they need additional support & training
- Ensure that they are contributing appropriately to organisational goals.

The appraisal meeting is a planned discussion between the line manager and the employee to review how the employee has carried out his/her job since the last appraisal. The discussion during the interview is to:

- i. Assess the employee's performance and review progress and priorities
- ii. Resolve or identify resolutions to any problems in these areas
- iii. Acknowledge successful performance in the post
- iv. Provide an opportunity for both parties to discuss how well organisational and line management arrangements are working and ways in which any difficulties can be addressed
- v. Identify whether the postholder's job description is still relevant to the work they are doing
- vi. Discuss future objectives and potential, together with training and development needs
- vii. Discuss the employee's role in contributing to organisational goals.

An appraisal meeting is not intended as:

- an opportunity for a line manager **or** an employee to raise a problem for the first time. Poor performance should be tackled when it arises through Support and Supervision Meetings.
- an opportunity to address disciplinary issues and does not form part of the disciplinary process. However, there may be some overlap in the issues

discussed in both the appraisal scheme and any disciplinary process.

Timing of appraisal meetings

Appraisal meetings will usually take place:

- Within 3 months of commencing employment
- Before the end of the probationary period (usually 6 months).
- Afterwards on an annual basis.

Appraisal meetings which take place during an employee's probationary period of employment will normally be referred to as 'Review Meetings'.

Preparation

Both appraiser and appraisee will be required to complete a relevant Pre-Appraisal Questionnaire at least two weeks prior to the meeting (see Appendix - there are separate questionnaires for 3 Month Review, 6 Month Review and Annual Appraisal). The appraiser will require the completed questionnaire to be returned to them at least 7 days before the date set for the appraisal interview. Following the appraisal meeting both appraiser and appraisee will complete a form summarising the meeting (see Appendix).

Staff who are dissatisfied with the outcome of their appraisal meetings can record any disagreements on the final appraisal summary form and can follow the grievance procedure if they feel that their disagreements have not been dealt with fairly.

Records

The appraisal summary form, plus the pre-meeting questionnaires, will be kept confidential in the staff member's personnel file, and access will be restricted to the staff member, appraiser, authorised members of staff with legitimate access to the individual's personnel file or members of any personnel sub-committee that the Board of Trustees may from time to time convene.

Appraisal interviews will take place on an annual basis, except for new employees or new post holders. These members of staff will have a review at three months and in the month prior to completing their first six months in the job. Thereafter, they would follow the normal pattern of appraisal interviews.

Venue

Appraisal meetings should take place at a mutually agreed venue where both parties feel comfortable. The venue should be private and free from potential interruptions.

Duration

Appraisal meetings will normally last between 1 and 2 hours. At least two hours should be allowed for the meeting. Managers should not undertake to have more than 2 appraisal meetings in one day.

2. Project Management Meetings

Purpose

The purpose of Project Management meetings is to support members of LGEC staff in their work on specific projects run by the organisation. Project Management meetings may involve individuals or project teams, depending on the nature of the project being worked on. Individual project workers are required to attend more than one Project Management meeting to provide peer support to others. All important decisions regarding project activity should be taken within a Project Management meeting, and recorded in the minutes of the meeting.

Aims of Project Management Meetings

- Project staff have regular time to discuss their project-related work
- Important decisions regarding project activity are taken and recorded in the minutes of the meeting.
- Each member of staff has clear and agreed work objectives
- Work objectives are regularly evaluated and reviewed
- Identify and deal with any difficulties, problems, or stresses that a member of staff may be experiencing with their work on a specific project.
- Aid personal and professional development of staff
- Give members of staff feedback and encouragement

Content

Project Management meetings will review:

- Project work plans
- Project budget and spending plans
- Monitoring and evaluation
- Specific elements of the project activity that either project worker or project manager has issues with
- Agreed actions from previous meetings

Frequency

Project Management meetings will take place on a regular basis (usually every 6 weeks)

Meetings will be arranged in advance and with at least one week's notice, unless circumstances of the running of the project require an urgent meeting.

Venue

Project Management Meetings will take place in a mutually agreed venue.

Duration

Project Management Meetings should be approximately 1 hour in length.

Records

All Project Management meetings will be minuted. The minutes will be agreed by all those attending the meeting, and will be stored in the project file. This file is **not confidential** and is open to all.

3. Support and Supervision Meetings

Purpose

Support and Supervision Meetings are a way of ensuring that each member of staff has regular, private and uninterrupted time with their line manager, in order to discuss their work and related issues. In contrast to Project Management Meetings, Support and Supervision Meetings are confidential, and provide an opportunity for staff members to raise issues that are not directly related to project activity. Each member of staff's job description contains details of the member of staff they report to and who is responsible for their support and supervision (your line manager). This member of staff is responsible for ensuring that you are provided with regular formal support and supervision meetings.

Aims

The main aims of staff support and supervision sessions are to:

- Ensure that each member of staff has clear and agreed work objectives
- Ensure all work objectives are regularly evaluated and reviewed
- Ensure all members of staff understand how their work fits into the organisation's overall aims and objectives
- Assist in the identification of training needs
- Identify and deal with any difficulties, problems, or stresses that a member of staff may be experiencing
- Aid personal and professional development of staff
- Give members of staff feedback and encouragement

Content

Support and Supervision meetings will cover:

- Review of action points from previous meeting
- Opportunity for supervisor to raise any relevant issues
- Opportunity for supervisee to raise any relevant issues
- Review of workplans and reports in the context of organisational objectives and strategic plan
- Review of any training undertaken or identified as necessary
- Review of TOIL, annual leave, time management and workload issues
- Agree action needed prior to next meeting

Both line manager and staff member are responsible for coming to the meeting adequately prepared.

Frequency

Support and Supervision Meetings will take place on a quarterly basis.

Meetings will be arranged in advance and with at least one week's notice, and should be rescheduled only in exceptional circumstances.

Records

Key-point notes and agreed action points should be recorded by the line manager, using the pro-forma designed for this purpose (see Appendix). This should be shown to the staff member and if it is agreed as a true record then both parties should sign it. A copy should be kept by the employee and a copy kept on the individual's personnel file. Should there be any disagreement over the notes then this should be discussed and, if possible, resolved. If no agreement can be reached then the line manager should record the difference of opinion in the notes. Support

and supervision notes are confidential and access will be restricted to the staff member, line manager, authorised members of staff with legitimate access to the individual's personnel file or members of any personnel sub-committee that the Board of Trustees may from time to time convene.