



*Dunbartonshire and Argyll & Bute  
Valuation Joint Board*

**PERSONAL PERFORMANCE, TRAINING AND DEVELOPMENT POLICY**

Version	Originator	Summary of changes	Date
V0.1d	D Thomson	Significant alteration to policy to better align performance, training and development directly to service need.	Jan 2020
V0.2d	D Thomson	Amendments following MT feedback	30 Jan 2020
V0.3	D Thomson	MT approval	4 February 2020
V1.0	D Thomson	Joint Board approval	16 September 2020

## 1.0 GENERAL

This Policy applies to all members of staff of Dunbartonshire and Argyll & Bute Valuation Joint Board (the “Joint Board”) with the exception of the Assessor & ERO and the Depute Assessor & ERO, who are subject to a separate Performance Management process.

## 2.0 PURPOSE

The purposes of this policy are:-

- To meet the Joint Board’s commitment to manage and improve performance through the competence of our employees.
- To ensure that employee performance and development are directly aligned to service plans and targets.
- To encourage employees to continually develop their careers by offering learning opportunities.
- To help boost confidence, morale and performance ensuring everyone is empowered and has the skills and knowledge to help deliver organisational objectives to the appropriate standard.
- To build relationships, provide support, and keep individuals feeling valued, motivated and engaged.

The Joint Board’s definition of competence is the knowledge, skills, attitudes and behaviours required to carry out individual duties satisfactorily.

## 3.0 OUR COMMITMENTS

The Joint Board aims to provide high quality, transparent, effective and responsive services to all of our stakeholders. The effective development of our workforce will enhance the individual contributions our employees can make in achieving these aims.

Our performance is assessed continually, both internally and externally, and the Joint Board recognises the relationship between effective employee development and improvements in service performance.

The Joint Board recognises the importance of offering relevant training and development opportunities in providing job satisfaction to employees and in staff retention.

In embracing equality of access to development, the policy covers all employees whether they are working full-time, part time, job-share or other flexible working patterns. Organising development should always be sensitive to the various needs of our workforce.

Performance and development conversations will be used to help managers and employees identify individual development needs. Development needs may seek to improve job performance, comply with statutory requirements or improve career progression. Where appropriate needs have been identified, the Assessor and Depute will take reasonable measures to attempt to ensure that these needs are met.

Management will work towards creating an environment where all employees can contribute ideas to service improvement. A suggestion scheme is available and all suggestions are discussed at the regular Management Team Meetings. Working groups have been developed which encourage a culture of continuous improvement and life-long learning.

Every new employee will receive Induction Training in line with the Joint Board's 'Staff Induction Procedures'.

## **4.0 PERSONAL PERFORMANCE AND DEVELOPMENT CONVERSATIONS**

### **4.1 General**

Performance and development conversations will proceed on the basis of the Joint Board's service planning and priorities, as revised annually.

Each member of staff should have **at least** one conversation annually with their line manager, **though more frequent discussions are recommended**. In considering the frequency of the meetings the parties should take the demands of the service into account. Meetings should be scheduled in advance so that both parties can plan for the conversation and not miss out on the opportunity.

### **4.2 Preparing for the Conversation**

To get the most out of the conversation the following should be considered:

- The Meeting Environment – a room should be set aside for the purpose
- Prepare ahead of the meeting –notes of subjects to be discussed may be useful
- Review any relevant information – for example, previous meeting notes (if any), service plan, job descriptions, core training record etc;

### 4.3 The Content of the Conversation

The content of the conversations will vary from meeting to meeting depending on what is current and relevant at that time. Generally, conversations may include, but are not limited to:

- General workload and review of work being undertaken in relation to service plans;
- Agreement of aims/goals/targets for the coming year/period;
- Identification of and feedback on achievements;
- Review of progress and identification of areas for support;
- Challenges encountered;
- Development identified - linked, or in addition, to Core Training elements
- Review of any recent development undertaken or training events attended and the impact/benefit;
- How the employee's work fits in to the wider team;
- Areas of concern or uncertainty – employee's and/or manager's;

The conversations will also vary depending on which stage in the annual cycle they are taking place.

At the beginning of each year the focus should be on:-

- What is happening in the employee's service area in the upcoming year?
- How is the employee going to prepare for any changes?
- How can the employee make improvements to the delivery of the Board's services?
- Clarification of the main roles, responsibilities, expectations and behaviours of the employee which may be aligned with the Board's Performance Framework
- Discussion of priorities and goals for the upcoming year
- The support and development needed to achieve team and individual goals
- Any Core Training requirement for the upcoming year
- Other, formal or informal, training requirements for the year ahead
- How does each employee's role fit in with the updated Service Plan?

Throughout the year, formal or informal, conversations may include:-

- General workload review discussions
- Discussion of challenges and how they can be overcome
- Feedback on accomplishments
- Discussion of ongoing tasks and new developments
- Review of the agreed aims/objectives
- 2-way feedback between employee and manager.

At the end of the year, conversations should include review of:-

- The successes over the year
- The challenges that have been encountered and how they were overcome
- The training undertaken
- How any training has helped the employee in the role
- The employee's overall performance

#### **4.4 Supporting Tools**

The following are available to support the Personal Performance and Development Conversations

- Performance and Development Records template (see below and Appendix 1) – not every conversation needs to be formally recorded but a record, including the 'End of Year Overall Review', must be completed for each employee annually.
- Job Profiles
- The Board's Service Plan and Annual Calendar, as revised annually.
- Core Training Framework
- The Joint Board Performance Framework
- Relevant organisational targets and objectives
- Relevant performance metrics
- Personal Development Plan database

#### **4.5 Recording the Conversations**

##### **4.5.1 The Personal Performance and Development Record**

The Personal Performance and Development Record template (Appendix 1) should be completed annually for each member of staff.

With regard to the above guidance, the employee and line manager should discuss, agree and record around 6-8 Objectives and Actions for the forthcoming year, though this can be varied in either direction as agreed by the parties. These should be arrived at having considered the relevant Job Description, Performance Framework, Service Plan, and any organisational objectives for the year ahead. Similarly, any behaviours and skills which will be required to meet the objectives and actions should be recorded.

Any training and/or development that will assist with the achievement of the agreed objectives or provide appropriate career advancement opportunities should be agreed and recorded on the Personal Performance and Development Record. The training thus identified will generally NOT include Core Training elements unless an employee is new to a post or a refresher is required.

#### 4.5.2 The Personal Development Plan (PDP) system/database

The agreed training and development needs, plus any Core Training required for the year in question, should be entered onto the Personal Development Plan (PDP) system, along with suggested actions to meet the development need.

A link to the PDP system can be provided by contacting the Systems Officer and a Guide to using the system can be found on the system's menu page by clicking the button marked 'guide'.

The completed PDP should be electronically signed by both parties.

Where agreement on a development need or suggested action cannot be reached, the item should be included in the Plan and brought to the attention of, and decided upon by, the Depute Assessor.

Having regard to service priorities, available budget and course availability, the Depute will seek to identify relevant training /development opportunities and relay these to both employees and their line managers.

#### **4.6 Interim Conversations**

It is recommended that an interim review meeting should take place approximately 6 months after the initial Performance & Development Conversation. The on line PDP system should be updated to reflect progress with the agreed plan and to reflect any other identified training or training that has been undertaken. Notwithstanding the recommendation that this step is a regular part of the process, other conversations and meetings may take place throughout the year at which any of the topics referred to at 4.3 above can be discussed and any progress or review of actions may be recorded on the Personal Performance Management and Development Record.

#### **4.7 Year-end Reviews**

Before or at the following year's Performance and Development Conversations, an end of year review should take place.

The purpose of this review will be to:-

- Review achievement of, and progress towards, the Aims and Objectives agreed at the start of the year
- Identify any areas where the Aims and Objectives have not been achieved or only partly achieved and to consider any reasons for that.
- Review the benefits (or not) of any training undertaken in achieving goals and objectives.
- Review any unfulfilled training requirement and consider whether to carry this forward to the following year's plan. Any core training that was not completed should be notified to the Depute Assessor along with reasons for it not being completed.

The review should be carried out in an honest and evidenced fashion and should be recorded in the final section of the Personal Performance and Development Record. Where the record, including the end-of-year Evaluation, is fully agreed, both parties should sign the Record and retain a copy for their own records.

Where the Record cannot be agreed, any point of disagreement should be included in the signed Personal Performance and Development Record and should be escalated to the Depute Assessor & ERO for further consideration and/or action.

## **5.0 EVALUATING LEARNING AND DEVELOPMENT**

Anyone attending a learning or development event will:-

- Attend at the directed times, treating the event with as much importance as any other business event.
- Have a post event discussion with their manager about how areas covered can be implemented back in the workplace to improve performance. Employees should complete a Training and Development Evaluation Form (See Appendix 2). This should be submitted to the Depute Assessor for review of the appropriateness of the event, and a copy retained within the employee's personnel file.

## **6.0 REVIEW**

This Policy will be reviewed at least every 3 years.