

**18 NOVEMBER 2021****PERFORMANCE REVIEW TEMPLATE****Purpose**

To seek agreement for the introduction of a temporary template (Appendix 1) for performance review (PR) discussions for Year End March 2022.

To seek agreement that undertaking mid-year and end of year reviews is a mandatory objective to be included in all managers objectives.

**Background**

1. Research across the FC on its performance review process has identified the current FJP form is cumbersome and not fit for purpose. It is out of step with current best practice and does not prompt conversations about wellbeing, challenges, or future potential.
2. It is clear a number of managers do not undertake mid-year and end of year reviews, leaving many staff without the opportunity to discuss their performance, development, and potential. Managers regularly blame the unwieldy paperwork as well as a lack of financial reward for high performance.
3. A review, as part of the FC People Strategy Year One Deliverables, is underway to overhaul the entire process, bringing in a modern approach to performance reviews and continuous improvement. This review will not lead to a new process/system for at least 12 months. It is critical at this stage, that all managers are undertaking reviews and this temporary change of paperwork is considered the best way to achieve that outcome ahead of further change.

**Discussion**

4. Feedback has been received from many that the form takes too long to complete for the value it provides. It is key that time at a performance review is spent to support individuals to improve their performance – not to complete the form. The current form focusses only upon objectives rather than an individual's overall performance in the period, their potential, their development needs and their wellbeing. New prompts within the temporary form encourage such discussions.
5. The proposed temporary form is based on the SCS performance review form and best practice. It makes the link to success profile behaviours – currently our process does not do this, and this is a disjoint as we recruit people against success profiles but do not review their behaviours against the same criteria.

### **Resource implications**

6. Managers will need to be comfortable in completing the new documentation. This will involve HR teams supporting their districts/areas/departments with its introduction.
7. An online recording will be produced, alongside articles and blogs on Roots/FR Intranet. This will have a slight resource implication for HR.

### **Risk Assessment**

8. FCTU need to be consulted and they may raise concerns about introduction for the current appraisal year. It is hoped the FCTU will support its introduction as they have expressed concerns previously of staff not receiving regular reviews. Employees benefiting from a simpler structure for discussion and feedback should alleviate any concerns raised by the FCTU.

### **Equality Impact Assessment**

9. An Equality Impact Assessment has been considered and as this is a new form that supports an existing process no further review is required.

### **Communications**

10. Communications will be via

- Guidance notes and/or MS Teams recorded session (this would be available for managers to view as they needed it) for HR team, senior leaders, and people managers
- Managers will then cascade to their teams with the support of their HRBPs and HR Ops Managers

### **Recommendations**

11. Executive Board agree the introduction of the temporary form for performance year end March 2022.
12. Executive Board support mandatory inclusion into manager objectives of completing mid-year and end of year performance reviews.
13. Communication plan in point 10 above.

**Workforce Policy Project Manager**  
**11 November 2021**