

Employee Review & Development Guidance

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1. Introduction

The Highland Council is committed to improving the job satisfaction, potential and performance of all our staff. To support this commitment all staff will benefit from a personal Employee Review & Development (ERD) Plan and receive regular reviews and feedback from their line manager throughout the year. This approach aims to support improved personal and career development.

The Employee Review and Development (ERD) process will:

- Identify any health, safety and wellbeing issues affecting the employee in their job role and work environment
- Clarify the employee's workload and establish their main work tasks until the next Review
- Identify the skills required to perform effectively in their job roles
- Agree any training and development needs to enable the employee to perform effectively
- Provide honest feedback on good work performance, clarify expectations and identify and resolve causes of under performance
- Provide an opportunity to discuss any other issues relating to the job role, including future plans
- Assist with the development of Service Learning and Development Plans and Succession Plan

The ERD process has 3 main parts:

- Staff Induction
- An annual Employee Review & Development Plan agreed between the employee and their manager
- Regular review between the employee and their manager

The programme of ERD planning will be managed on an annual basis to support service planning.

2. Induction

All staff must receive an induction on starting employment with the Council or moving to a new job. The corporate **induction checklist** provides guidance on what should be covered. Services should add any specific requirements for each role.

Before the induction meeting the manager will plan the annual review arrangements and schedule of meetings. These will be based on the requirements of the job and the individual employee.

During induction the manager will explain the aim and arrangements of the ERD process including key dates for reviews, the content of each review and how outcomes will be recorded.

3. Annual ERD Planning Meeting

The Employee Review & Development (ERD) Plan will be agreed between the manager and employee at least once a year. It includes an annual ERD planning meeting and a series of review meetings. The ERD meeting involves an assessment of progress in the previous year and planning for the year to come.

The ERD planning meeting will be a face to face meeting between the employee and their manager and will focus on the following topics:

- Health, Safety and Wellbeing
- Workloads and Objectives
- Performance
- Skills & Development
- Future Plans

The outcome of the ERD planning meeting will be agreed actions relating to these topics to be addressed in the coming year.

To support assessment of progress and planning employees and their managers are guided to consider the Council's values and the core and management competency frameworks, which set out the behaviours expected of all employees of the Council.

4. Review Meetings

All staff should receive a regular ERD review. However, the format, frequency, focus and documentation for the review should be determined by the job role. Corporate and Service specific templates will be available to assist managers.

The review format can range from telephone contact, to a group briefing or an employee face-to-face discussion. Where an existing procedure for supervision or review is in place this will continue to be used where appropriate. Staff must be clear, however, on what review arrangements apply to their job role.

The focus and content of each review will vary depending on the job role and will cover health, safety and wellbeing, performance, workload management and skills and development.

The content of the review should be recorded using the **Review Form (Corporate)** or alternative Service documentation more appropriate to the job role.

The chart below outlines some review options.

Review Meetings

<p>Focus</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> <input type="checkbox"/> Health, Safety & Wellbeing<input type="checkbox"/> Workload & Objectives<input type="checkbox"/> Performance<input type="checkbox"/> Skills & Development<input type="checkbox"/> Future Plans	<p>Frequency</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> <input type="checkbox"/> 6 Monthly<input type="checkbox"/> Quarterly<input type="checkbox"/> Monthly
<p>Documentation</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> <input type="checkbox"/> Corporate<input type="checkbox"/> Service Specific	<p>Format</p> <ul style="list-style-type: none"><input checked="" type="checkbox"/> <input type="checkbox"/> Face to Face Individual<input type="checkbox"/> Face to Face Group<input type="checkbox"/> Telephone Call

Not all topics need to be discussed at each review. Discussion should focus on the issues most relevant to the employee and the job role at the time of the review. However all topics must be covered at least once every 12 months.

The following are possible issues for discussion.

Health, Safety & Wellbeing

- Health & safety requirements (*including mandatory training*)
- Issues from job role/work place risk assessment (*remember risk assessment and adjustment for pregnant staff*)
- Health issues (*remember adjustments for disability or other needs*)
- Attendance at work
- Working relationships including those with those with clients and contractors
- Workplace stressors
- Working environment and facilities
- Role of Mental Health Representative

Workload & Work Objectives

- Work plan and actions from last review
- Next period's work plan
- Workload management (*address level of workload – insufficient, sufficient, too much*)
- Changes to working practices affecting work (*procedures, organisational developments, standards, legislation*)
- Any support issues arising

Skills and Development

- Progress with role specific requirements
- Changes to skill requirements (*as a result of new tasks, changes to working practices etc.*)
- Training and development required (as a result of issues discussed in Health, Safety & Wellbeing; Workload and Work Objectives and Performance)

Performance

- Progress against targets and expectations
- Honest praise for work completed well
- Lessons learned and areas for improvement
- Professional practice and standards
- Assessment of values and competencies

Future Plans

- Future work developments likely to impact on the employee
- Employee plans or aspirations that might likely to have an impact in the workplace

At the beginning of each review the manager should explain that the meeting or telephone call is to carry out a review as agreed in the employees ERD Plan.

5. Using the ERD Form (Corporate)

The **ERD Form (Corporate)** has been designed to support ERD planning for the majority of employees. Service and job specific forms will be developed and made available where appropriate.

Step 1

The manager should arrange an initial discussion with the employee to agree the time date and venue for the ERD meeting and to refresh their understanding of the process.

Step 2

Before the ERD meeting the employee and their manager should both spend some time thinking about:

- The **Council's values** and the **core competencies** expected of both the employee and their manager
- The employee's job role and the actions agreed at the previous ERD meeting and subsequent reviews
- Any expected future changes
- Anything else that may be important to discuss

Step 3

Prior to the ERD meeting the manager should complete the cover sheet, update (or attach) a copy of the previous year's action plan and details of updates from the previous year's review meetings. The document should then be forwarded to the employee.

Step 4

The employee should review the sections completed by their line manager and complete the six questions on the self-assessment section. They should also consider their performance and development in relation to the Council's values and competency framework before returning the form.

Step 5

At the meeting the employee and their line manager will discuss and agree the content to be recorded relating to the Council's values and the actions to be included in the next ERD plan. The line manager will complete the document and return a copy to the employee.

Depending upon Service arrangements, ERD outcomes (the personal development priorities) may be passed to the training representative for your Service. Some training and development needs can be met within the workplace. For other needs should be addressed in consultation with Employee Development.

6. Meeting Development Needs

Development needs can be met in a variety of ways, some of which are listed below:

- Short courses (*either internal or external providers*)
- Coaching
- Mentoring/supervision sessions
- Open learning (*paper based with support or computer based*)
- Blended learning (*e-learning and support workshops*)
- Reading
- Secondments
- Formal qualifications (*vocational qualifications, HNC etc.*)

Employee Development can advise on appropriate development methods and training providers.

7. Review and Evaluation

As part of the on-going ERD process, managers should continue to carry out regular reviews with staff and this can include an informal review of the ERD Plan.

Any additional skills or development needs can be identified during these reviews. A full ERD planning meeting should take place annually.

Dates of induction meetings, annual ERD meetings and review meetings will be logged on a central system and reported to Directors for review on a quarterly basis.