Qualification: Level 5 CIPD Diploma in Applied Human Resources

Module Name: Contributing to Improving Organisational Performance

Learning Outcome 1 - Word Count: 958

Learning Outcome 2 – Word Count: 971

Learning Outcome 3 – Word Count: 973

Student Name: Sophie O'Kelly

Student Number: 1904625

CIPD Membership Number: 55491663

By signing below, I confirm that the work/evidence presented is my own, unaided work. I understand the regulations pertaining to candidate malpractice and the action that may be taken as a result.

Signed: 

Date: 14.09.2020

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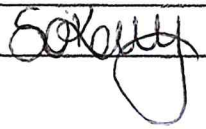
CIPD Candidate evidence matrix (CEM1)

Candidate name: Sophie O'Kelly				CIPD Membership/registration No.: 55491663		
Qualification title: CIPD Level 5 Diploma in Applied HR				**Unique Learner No. (ULN):** 1904625		
Unit code	**Unit title**	**Assessment criteria no.**	**Evidence description**	**Evidence reference number**	**Assessor initials**	**I/V initials if sampled**
5AIOP	Contributing to Improving Organisational Performance	1.1	Maximus Performance Management Support & Management Framework	EV1		
5AIOP	Contributing to Improving Organisational Performance	1.1	Performance Expectations Document	EV2		
5AIOP	Contributing to Improving Organisational Performance	1.1	Maximus Performance Appraisal Policy	EV3		
5AIOP	Contributing to Improving Organisational Performance	1.1	Maximus Pay and Reward Eligibility Policy	EV4		
5AIOP	Contributing to Improving Organisational Performance	1.1, 3.1	Maximus Colleague Recognition Toolkit	EV5		
5AIOP	Contributing to Improving Organisational Performance	1.1	Making a difference Awards Guidance	EV6		
5AIOP	Contributing to Improving Organisational Performance	1.1	Enhanced Support Plan	EV7		
5AIOP	Contributing to Improving Organisational Performance	1.1	Maximus Performance Capability Policy	EV8		
5AIOP	Contributing to Improving Organisational Performance	1.2	Contractual Performance Dashboard	EV9		
5AIOP	Contributing to Improving Organisational Performance	1.3, 3.1	Induction Checklist	EV10		
5AIOP	Contributing to Improving Organisational Performance	1.3	File Checks How to Guide	EV11		
5AIOP	Contributing to Improving Organisational Performance	1.3	Calendar Invite to File Check Coaching Session	EV12		
5AIOP	Contributing to Improving Organisational Performance	2.1	Training Proposal email to Line Manager	EV13		
5AIOP	Contributing to Improving Organisational Performance	2.1	Line Manager Pre-Training Questionnaire	EV14		
5AIOP	Contributing to Improving Organisational Performance	2.2	Training Agenda for Line Manager Training	EV15		
5AIOP	Contributing to Improving	2.2	Enhanced Support Plan Training Presentation	EV16		

	Organisational Performance					
5AIOP	Contributing to Improving Organisational Performance	2.2	Post Training Performance Coaching Email to Line Managers	EV17		
5AIOP	Contributing to Improving Organisational Performance	2.3	Post PDP discussion email to Line Manager	EV18		
5AIOP	Contributing to Improving Organisational Performance	2.3	Post Learning & Development Action Plan Meeting Email	EV19		
5AIOP	Contributing to Improving Organisational Performance	2.3	Induction Meeting Invite	EV20		
5AIOP	Contributing to Improving Organisational Performance	3.1	Work and Health Programme Competitor Analysis	EV21		
5AIOP	Contributing to Improving Organisational Performance	3.1	Performance Management Approach Evaluation Meeting Invite	EV22		
5AIOP	Contributing to Improving Organisational Performance	3.1, 3.2, 3.3	Performance Expectations Document	EV23		
5AIOP	Contributing to Improving Organisational Performance	3.2	Work & Health Programme Performance Dashboard	EV24		
5AIOP	Contributing to Improving Organisational Performance	3.3	Talent & Development Support Programme – Recommendation from my previous research study	EV25		

Candidate declaration:

- I confirm that the work/evidence presented for assessment is my own unaided work.
- I have read the assessment regulations and understand that if I am found to have 'copied' from published work without acknowledgement, or from other candidate's work, this may be regarded as plagiarism which is an offence against the assessment regulations and leads to failure in the relevant unit and formal disciplinary action.
- I agree to this work being subjected to scrutiny by textual analysis software if required.
- I understand that my work may be used for future academic/quality assurance purposes in accordance with the provisions of the Data Protection Act 1998.
- I understand that the work/evidence submitted for assessment may not be returned to me and that I have retained a copy for my records.
- I understand that until such time as the assessment grade has been ratified through internal and external quality assurance processes it is not final.

Signature:		**Date:**	14/9/2020

CIPD

Learning Outcome 1

1.1 Explain Performance Management Policies and Processes in the organisation and the roles and responsibilities of those involved in them

At Maximus, Line Managers have access to a Performance Support and Management Framework (EV1). Employees are given clear, measurable performance expectations that are recorded on a Performance Expectations Document (EV2). Formal performance assessment is termed a Performance Appraisal (Armstrong, 2018). Annual Appraisals are used to reflect on the past year and plan for the year ahead. A Performance Appraisal Policy is available to support with this facilitation (EV3).

Line Managers are responsible for regularly reviewing performance at Monthly Check Ins, providing feedback, identifying areas of underperformance in a timely manner and providing support. The Monitoring stage of the performance management cycle ensures that any underperformance is given attention in good time so that improvements can be made (Armstrong, 2016). The employee is required to prepare for their appraisal, rate themselves against the criteria, perform to their full potential and meet the required standard. Maximus People Manager provides advice and support, along with the wider HR team to ensure the process is fairly applied and managed. Following the performance appraisal meeting, a moderation exercise takes place to ensure consistency. At Google, they operate a Calibration process to ensure fairness, where Managers with similar teams will review their employees' performance collectively (Bock, 2015).

The Pay and Reward eligibility policy details how to recognise exceptional performance (EV4). There is also a Colleague Recognition Toolkit (EV5) and 'Making a Difference Awards' Guidance (EV6) that can support Line Managers.

The process of Performance Management is positive, building on strengths but is also used to help people improve (Armstrong, 2018). Where underperformance can be addressed, a period of enhanced support should be initiated. Expectations should be documented on an Enhanced Support Plan (EV7). Where there are instances of an employee not being able to achieve what is expected, Managers need to refer to the Performance Capability Policy (EV8). Delivery of the performance capability process is facilitated by the Line Manager but supported by Maximus People Manager and the HR Team. The employee is responsible for engagement with the process and improvement of performance where they are failing to meet the required standard.

1.2 Explain key sources of information, including legislative information, which underpin performance management activities

At Maximus, Performance targets are set by Commissioners. In Wales we deliver Work and Health Programme on behalf of DWP. DWP set contractual targets and our performance is monitored frequently. Performance against contractual expectations is displayed on our Contractual dashboard and visible to all employees (EV9).

Performance Management Activities are underpinned by key legislation. Employers must adhere to ACAS codes of practice as they ensure a base level of fairness is achieved. Employment Tribunals take these into consideration when making decisions (ACAS, 2010). The Code of Practice on Disciplinary and Grievance Procedures can support with any underperformance that results in disciplinary. Where an Organisation such as Maximus has their own capability procedure, it should still ensure to adhere to the codes of fairness (ACAS, 2015). The Employment Relations Act 1999 allows colleagues the opportunity to be accompanied at any such hearing (Daniels, 2019).

Issues with data protection impact on most HR concerns including performance management. The security of information is currently overseen by the Data Protection Act 2018 and the General Data Protection Regulations (GDPR). This legislation protects individuals from wrongful use of their data. Organisations must make sure colleagues are aware of what their entitlements and responsibilities are (CIPD, 2020).

Discrimination Law ensures all policies and processes are free from discrimination including performance management processes. The Equality Act 2010 has brought together all areas of discrimination legislation (Daniels, 2019). One Act took the place of earlier discrimination legislation, potentially strengthening protection and incorporates several forms of unlawful behaviour towards an individual (Gov.uk, 2013).

According to the Employments Rights Act 1996 there are potentially five fair reasons for an employer to dismiss; one of which is 'Capability or qualifications'. The Act ensures that Employers are accountable for employees understanding their role requirements, they identify training needs and provide this where appropriate. They should also ensure that the employee has clarity of any likely consequence for failing to achieve the required performance standards (Daniels, 2019).

1.3 Provide timely and accurate information to colleagues regarding performance management activities

The Co-operative Group won a national training award by revising their induction programme. Turnover reduced, employees were more engaged and Managers were actively involved in the process (Pollitt, 2013). At Maximus, due to high attrition, we carefully considered our current induction programme. Consequently, I created a new Induction Programme to ensure that new employees were provided with all the support, skills, knowledge and training required to perform effectively (EV10). An effective induction programme allows the employee to become productive quickly and work to their highest potential (CIPD, 2019). Performance Expectations being made transparent is important and Line Managers are responsible for clarifying these (Hutchinson, 2013). In my role, I ensure that this happens and that New Employees are directed to policies and processes for any additional clarity and understanding. I monitor induction progression and ensure inductions aren't signed off until the checklist has been completed.

File Checks are a fundamental performance management activity that Line Managers use to monitor performance and provide feedback to colleagues to ensure they understand what they have done correctly and what they need to change. Gifford (2016) discusses how feedback can make the difference of a positive impact, negative impact or no impact. I created a How to Guide for Managers to ensure they are confident in their knowledge and understanding of how to complete an effective

file check (EV11) and also provided one to one coaching to those who required additional support (EV12).

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POLLITT, D. (2013) 'Co-operative Group induction inspires enthusiastic and engaged employees', *Human Resource Management International Digest,* 21 (5), pp. 19 – 21. DOI: DOI 10.1108/HRMID-05-2013-0039.

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EV1

Performance Support and Management Framework

November 2019

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Introduction

All employees play an important role in contributing towards the successful delivery of employability services across MAXIMUS UK. It is important, therefore, to have clear expectations of what each employee is expected to contribute, and to have robust processes to ensure that these are achieved.

The Performance Support and Management Framework consists of the tools and processes available to support employees to work to the best of their ability, and for managers to effectively manage teams to achieve and exceed required expectations.

This document provides a descriptive overview of the Framework and how this is utilised to manage and support performance, and should be read alongside guidance located on MAXIMUS People Manager and Ignite.

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EV2

Performance Expectations

Staff Name:	Staff Name
Job Role:	
Contract:	
Expectations Set Date:	Expectations Set Date

Performance

Compliance

Quality Assurance

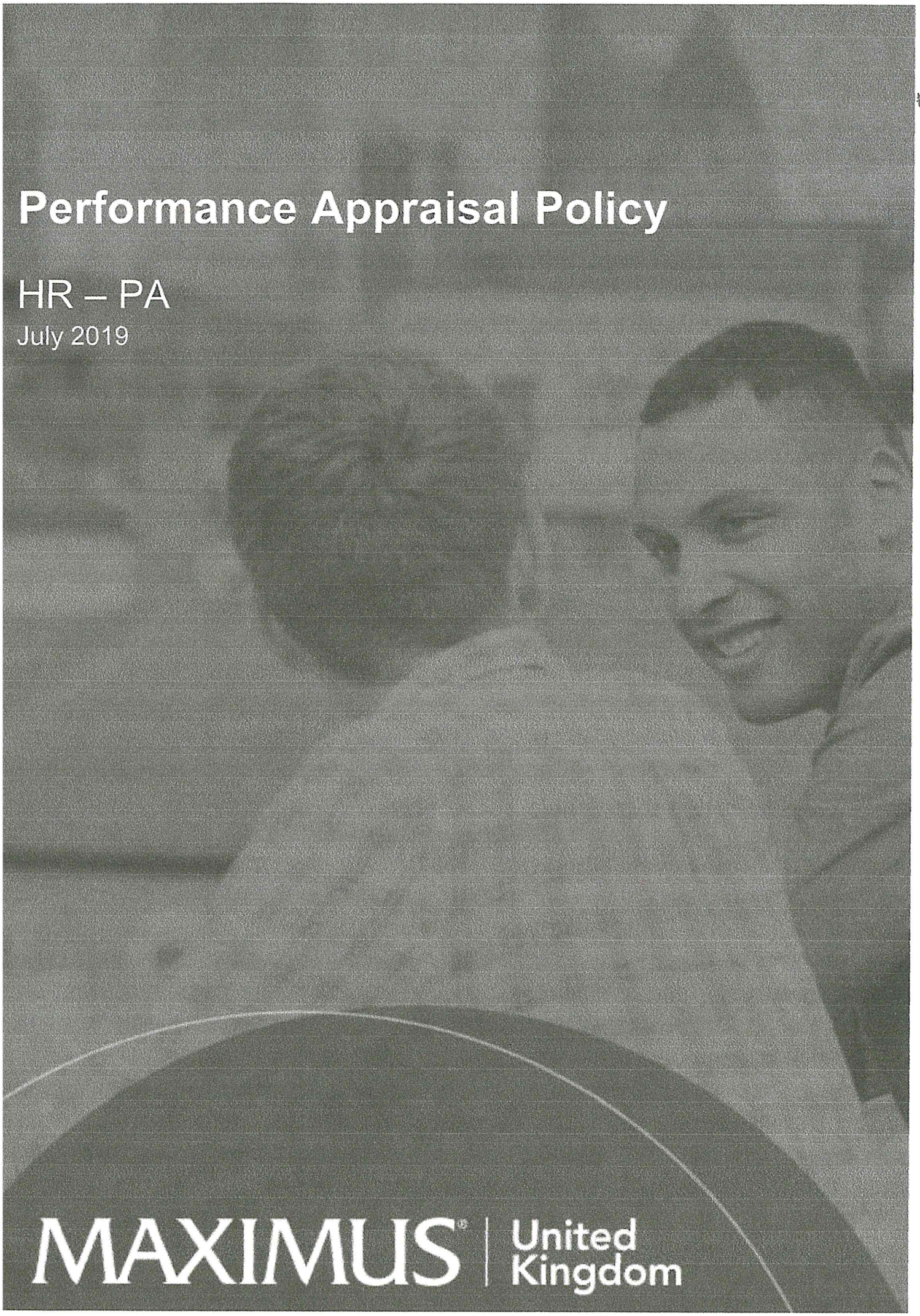
Customer Experience

Key Performance Indicators

Performance Appraisal Policy

HR – PA

July 2019



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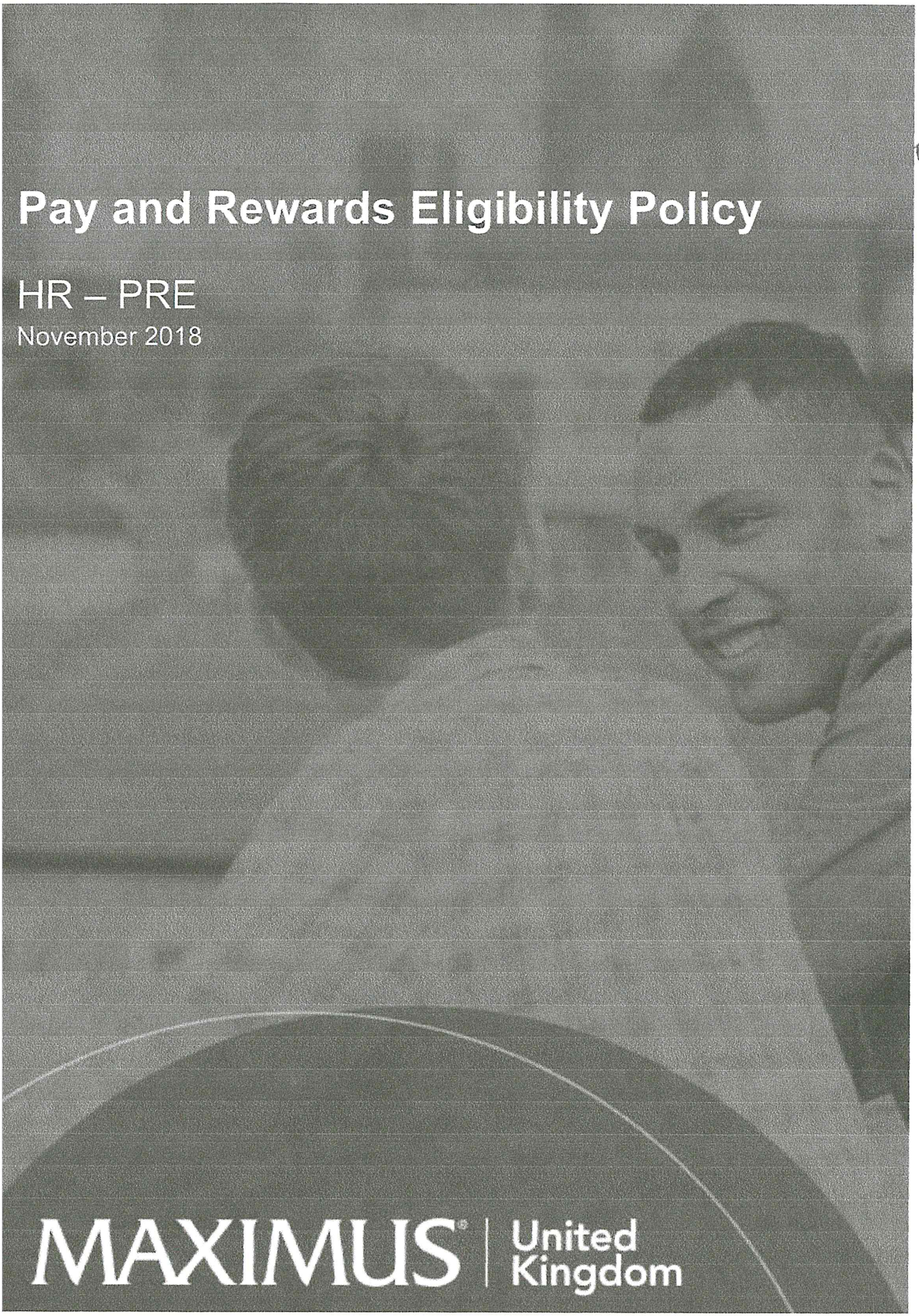
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Pay and Rewards Eligibility Policy

HR – PRE

November 2018

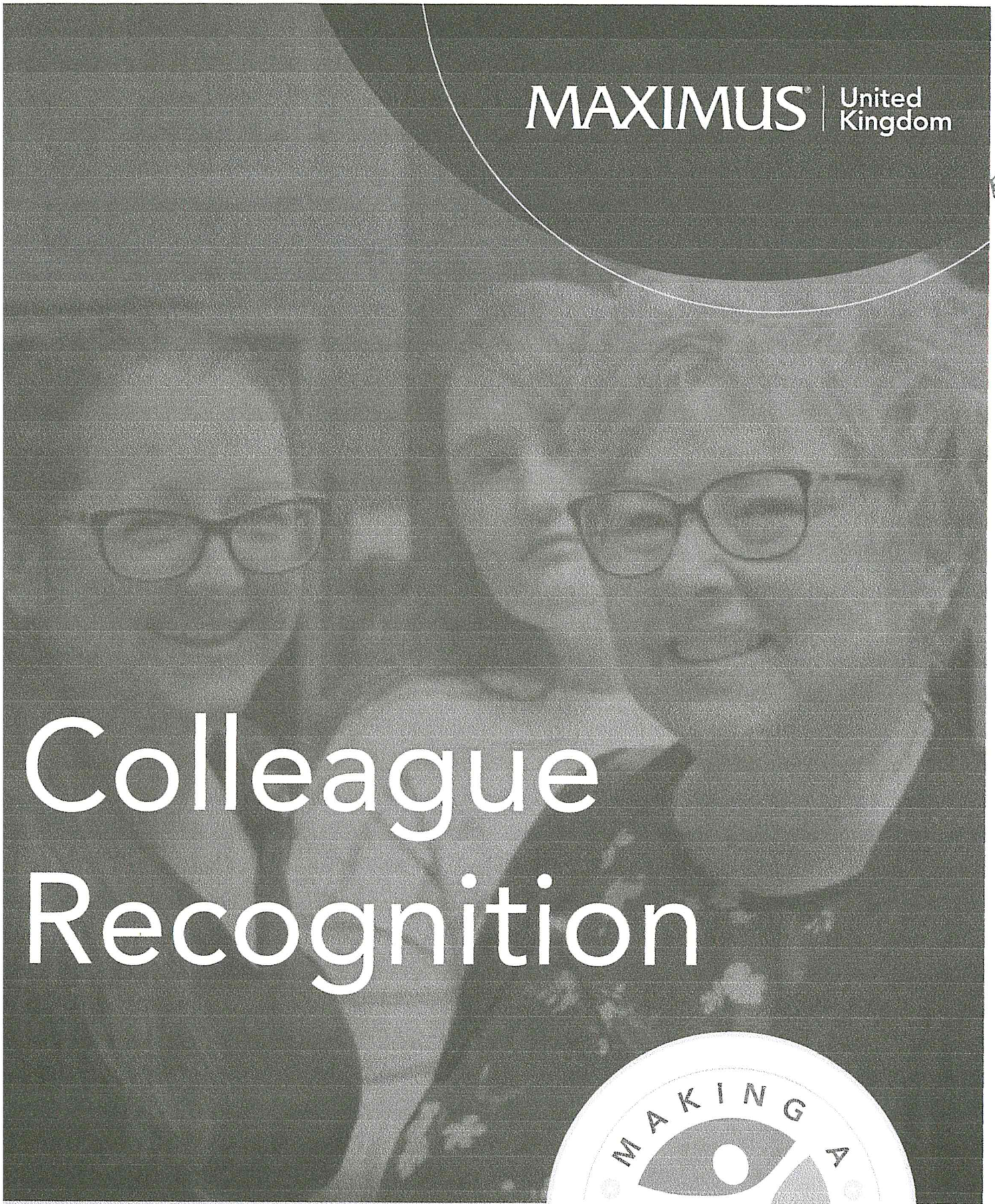


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Colleague Recognition

MAKING A DIFFERENCE

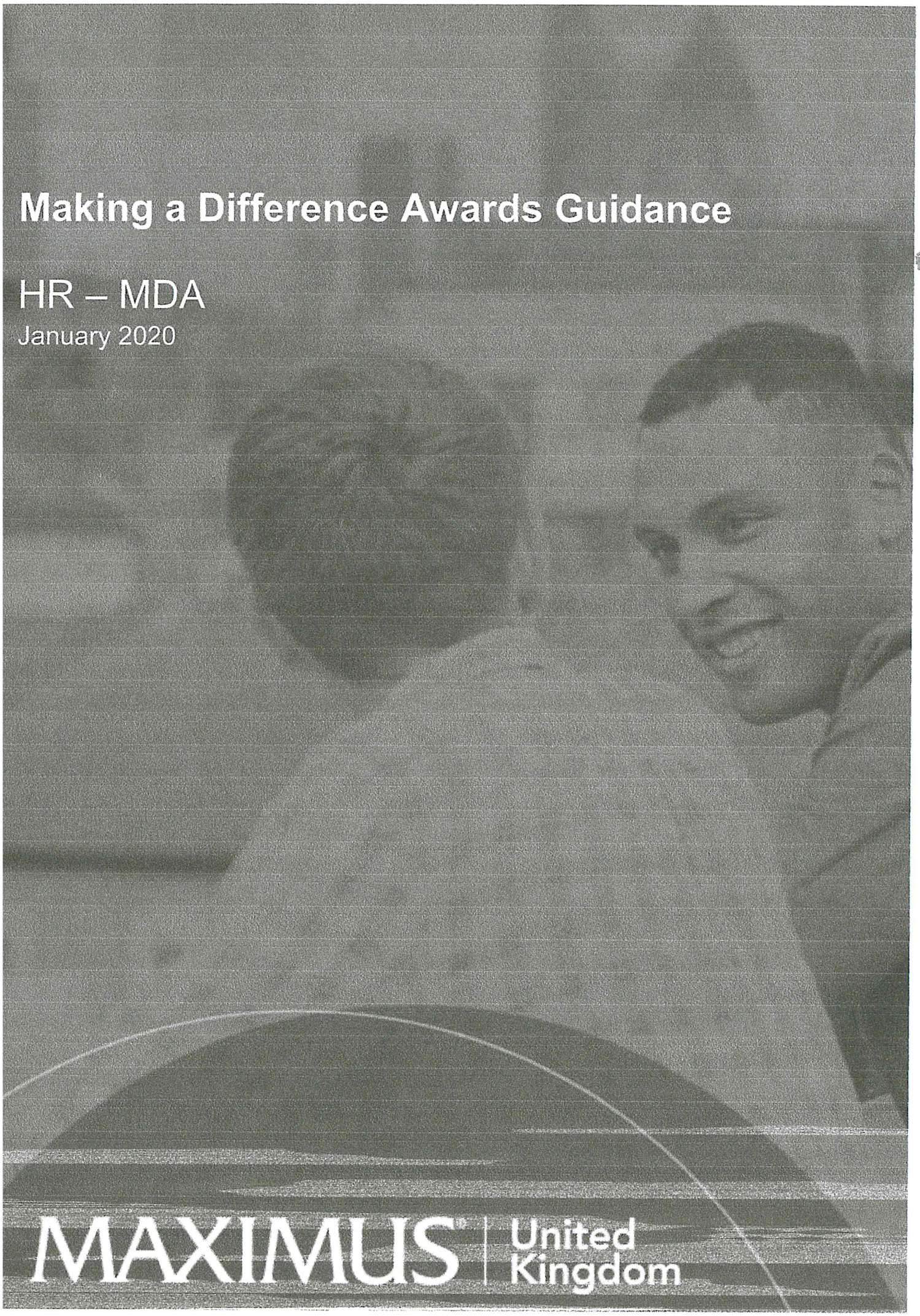
A Guide for **Line Managers**

Making a Difference Awards Guidance

EV 6

HR – MDA

January 2020



MAXIMUS | United Kingdom

Contents

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3. Award Levels and Guidelines 4
4. Submitting a Making a Difference Award Nomination 6
5. Approving a Making a Difference Award Nomination 7
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EV7

Enhanced Support Plan

Staff Name:	Staff Name
Job Role:	Job Role
Contract:	Contract Name
Date of Review:	Select Date

Areas Requiring Support

Enhanced Support Plan

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Action Plan

Provide an update on all actions relating to the areas requiring support from the Month Check-In & Metrics Review Action Plan.

Enhanced Support Plan

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Discussion

Employee Commentary

Please provide an overview of the progress being made and any support that you feel that you require.

Line Manager or Reviewer Commentary

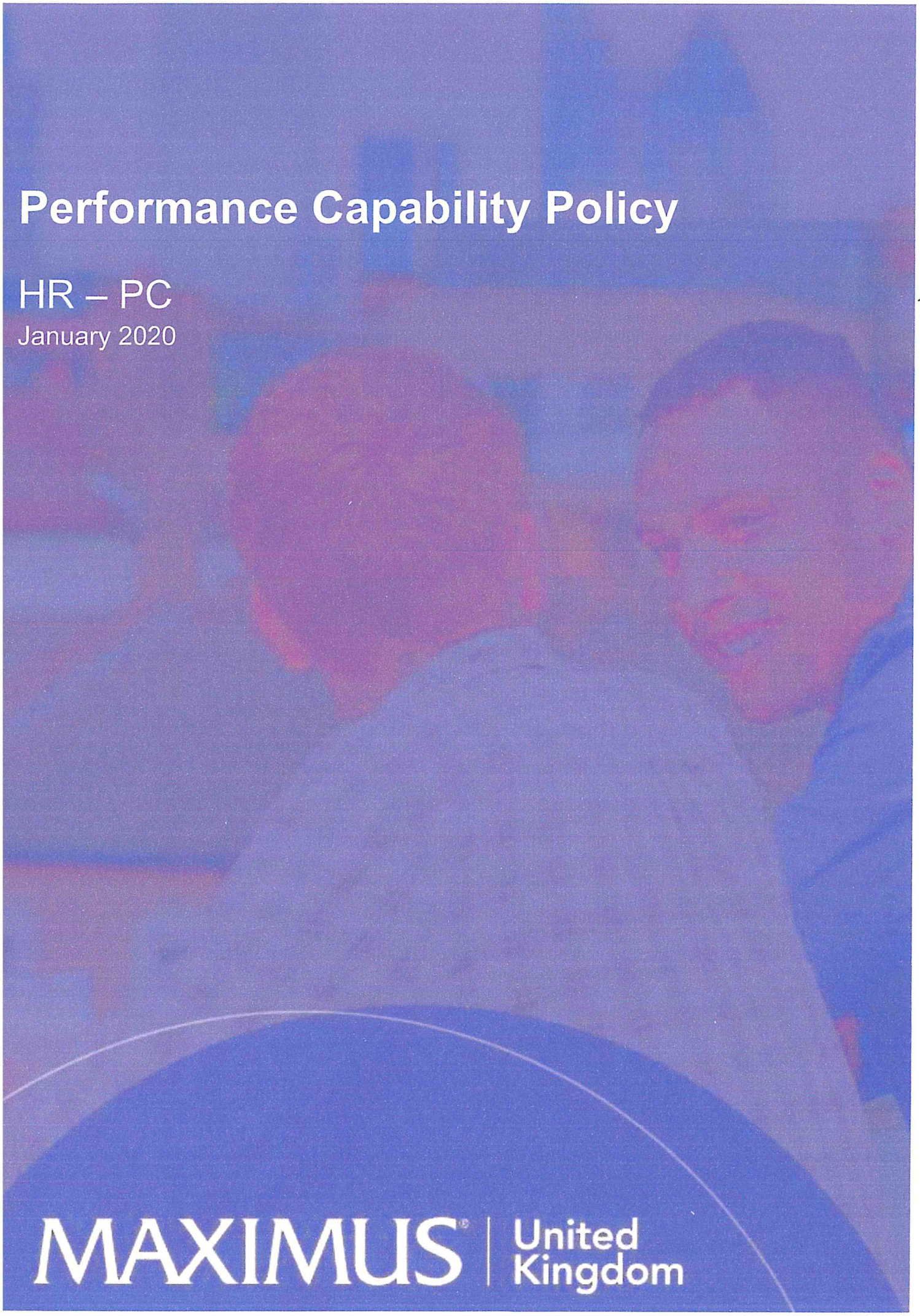
Line Manager or Reviewer to complete with details of discussion, support provided, and agreed further actions.

Performance Capability Policy

HR – PC

January 2020

EV 8



MAXIMUS | United Kingdom

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EV9

Region	* All	Zone	* All
Advisor	* All	DDA	* All
Referral Type	* All	View Type	Contract

1 of 1 100% Find | Next

Work & Health Programme - Wales
Contractual Performance Dashboard
(Phase 2)

Mi Team

Contract Entrants vs Contract Profile

EVIO

Week 1 - Welcome to the

Name	
Employee Number	
Start Date	

Manager New Start Checklist

URL's

- [ ] Equipment order - laptop, laptop bag, phone, lock, portable scanner and printer (if applicable) — https://crea
- [ ] System Access - Google, Adapt, R Drive, Cascade, Learning Academy, Travel Portal, Mi Data App
- [ ] Photo and name badge — https://doc
- [ ] Car Insurance Documents
- [ ] DBS and reference status

Update on the above:

Week 1

Day 1 - Overview, Essentials and Introductions

- [ ] Local Induction with Performance Lead (ES) (FT)
- [ ] Branch Tour (ES) (FT)

Day 2 - F

- [ ] Master Pol
- [ ] Expenses

Week 1 | Week 2 | Week 3 | Week 4 | Useful Links | Wales Org Chart | NMW Or

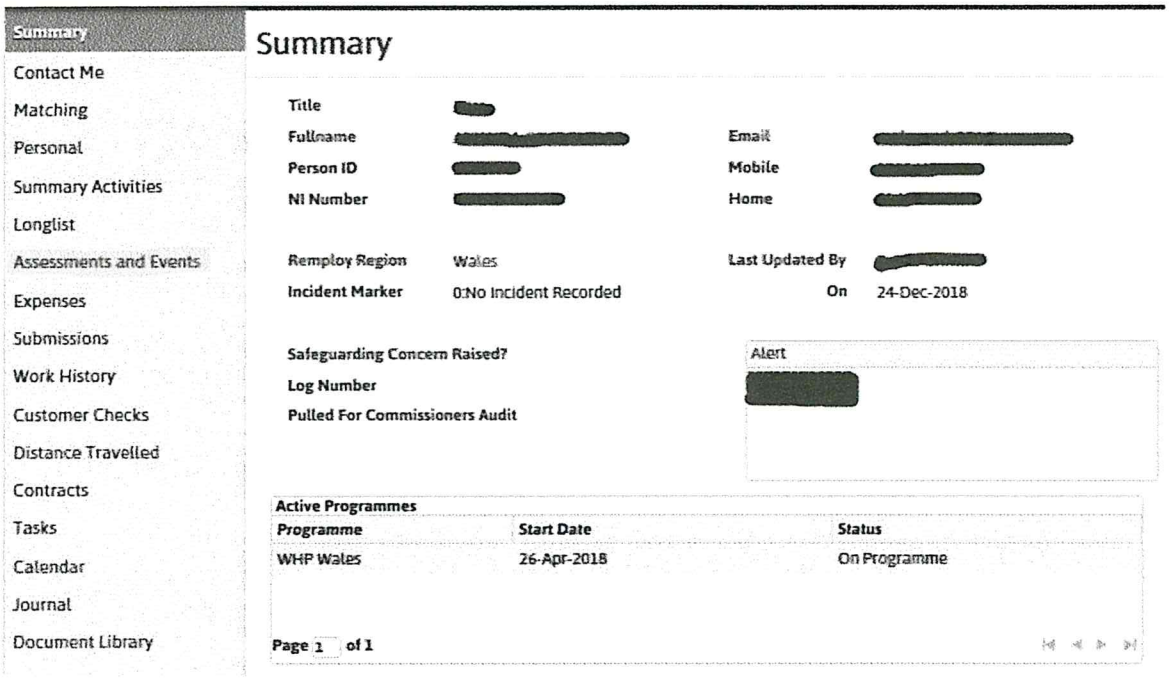
EVII

Remploy Cymru
Putting ability first

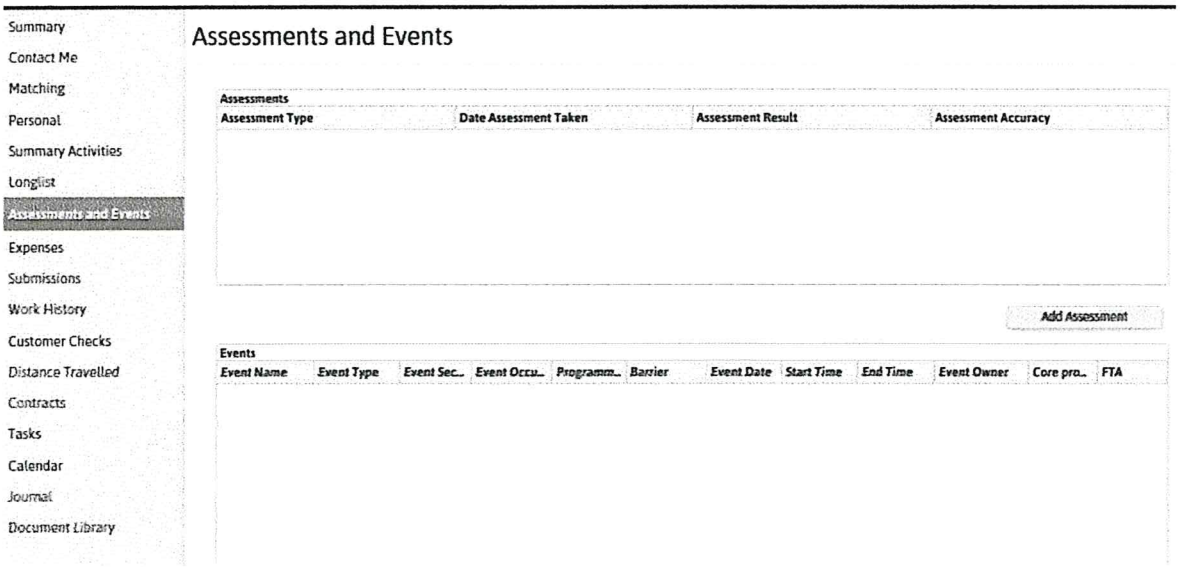
Work and Health Programme Wales

Work & Health Programme – How to locate File Check Questions on Adapt

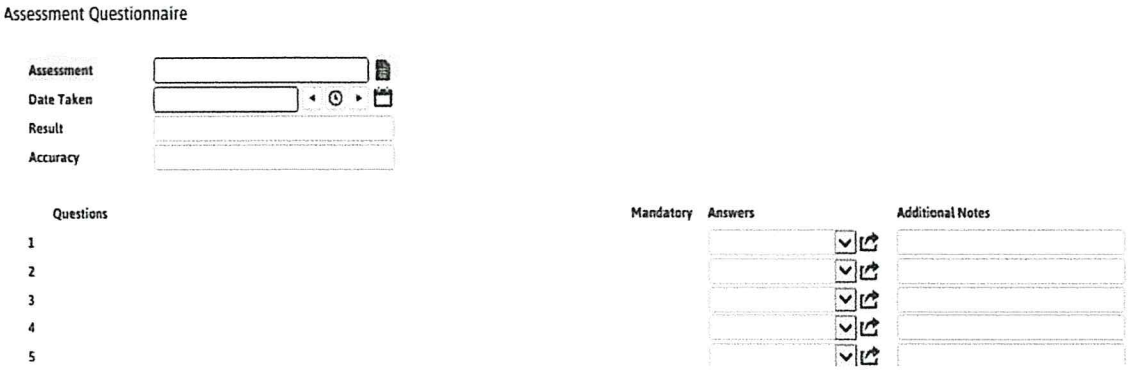
1. Locate Customer on Adapt and click on 'Assessments and Events' on the main Summary Page



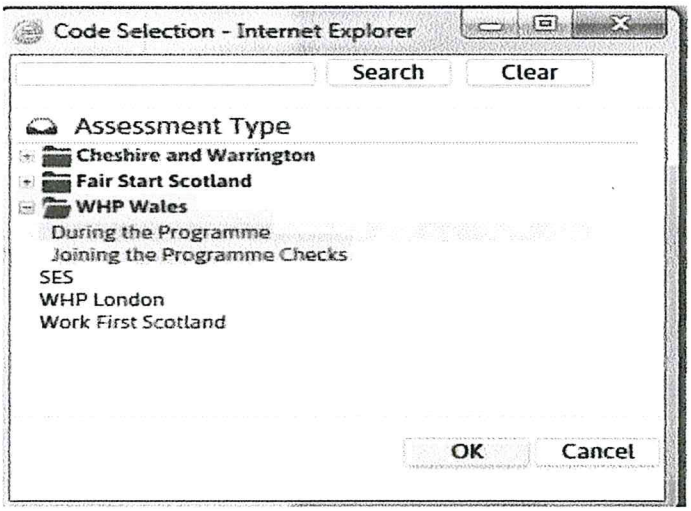
2. Click on 'Add Assesment'



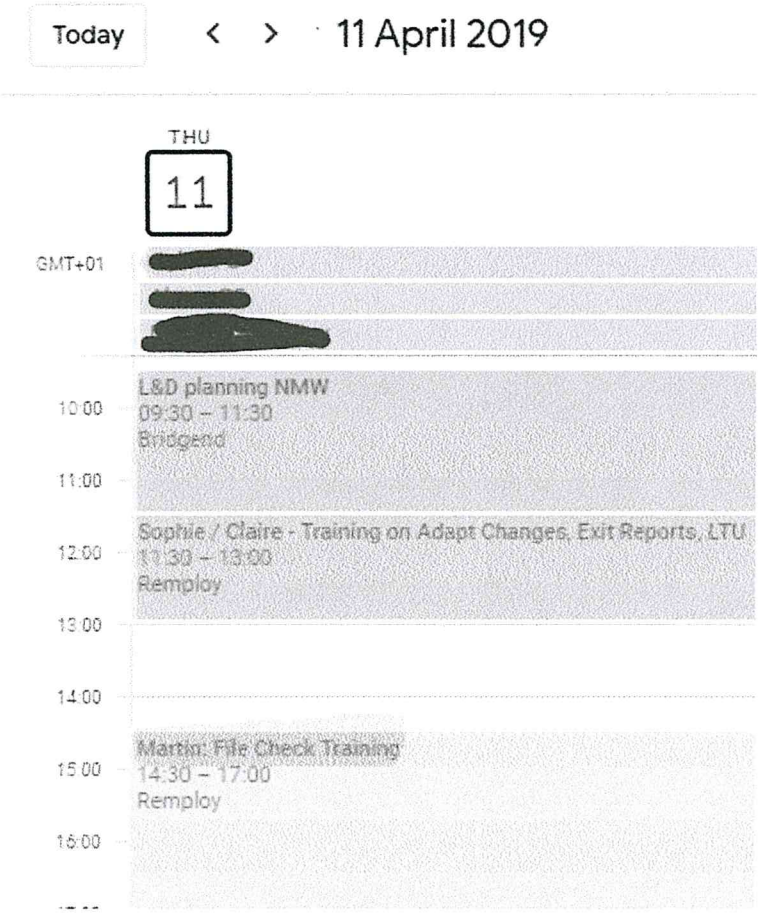
3. **Click on to the Drop Down box next to 'Assessment' to pick the relevant file check Questions.**



4. **Click into 'WHP Wales' and choose relevant File Check questions (Either choose 'During the Programme' or 'Joining the Programme Checks'). Then click 'OK'**



EV12


Today
11 April 2019
THU
11
GMT+01
[redacted]
10:00
L&D planning NMW
09:30 – 11:30
Bridgend
11:00
12:00
Sophie / Claire - Training on Adapt Changes, Exit Reports, LTU
11:30 – 13:00
Remploy
13:00
14:00
15:00
Martin: File Check Training
14:30 – 17:00
Remploy
16:00

Learning Outcome 2

2.1 Analyse the types of support line managers in the organisation need from HR, in relation to performance management activities.

I attended a Senior Leadership Team meeting in Sept 2019 where the theme focused on 'Performance'. There was a requirement for a year-end push, and a long term solution for improved performance. Members of the Senior Team felt that Line Managers needed additional training in this area. Line Managers are key in influencing employee attitudes and behaviours. Demands are growing and Line Managers are now responsible for most aspects of performance management. However, it is regularly shown that Managers struggle to undertake these roles effectively and often due to a lack of training (Hutchinson, 2013). I came away from the meeting with the action to consider what the training may entail and put a proposal together which was sent to my Line Manager (EV13) In order to gauge Line Managers thoughts on what support they needed, I put a pre-training questionnaire together to ensure we addressed the support required (EV14). Through direct consultation with Line Managers we established the support required was training on how to use performance management tools to effectively drive and improve performance, support with how to address underperformance and deliver effective feedback. Employees are our greatest asset and In order to retain them we needed to ensure our Line Managers have the adequate skills and knowledge to effectively manage them (Bajoreck, 2020).

2.2 Support line managers' capability to deliver performance management activities.

Following the feedback, a training plan was compiled and I facilitated a 2 day Training session, centred on 'Driving Performance' (EV15). I was supported by various subject matter experts. The training incorporated the Performance Management Framework, Objective setting, an introduction to support tools to monitor performance and supporting underperformance. Google's Performance Management System has always started with goal setting. Google always set ambitious goals that quite often they know are unachievable but believe that if you've achieved all your objectives, they weren't challenging enough (Bock, 2015). The workshop tested feedback skills along with techniques to address underperformance. Feedback is an important aspect of performance management and should be delivered in a way that allows colleagues to recognise and accept it as fact (Armstrong, 2018). Following this session, I designed and delivered additional training focusing specifically on underperformance (EV16). It focused on the enhanced support plan; how to initiate the support, how to ensure actions set are SMART and how to document the information correctly. A solid plan needs to be developed to incorporate what both Managers and Employees are going to do differently; agreeing on measurable outcomes to ensure progress can be checked (Gallo, 2014).

The recent pandemic meant that performance has been more challenging and resulted in us needing to reconsider our approach to performance management. More recently, there has been an expectation from Commissioners to see improvements. We had to ensure performance increased but not put any undue pressure on colleagues. The pandemic has brought people's health and wellbeing to the top of the business agenda. Many employees feel isolated, are anxious and/or are juggling caring responsibilities around work. It has led to a number of unhealthy work practices such as 'presenteesism' where people are working when they are unwell and 'leaveism' where people are

working on annual leave to catch up (CIPD, 2020). Our Senior Performance Manager, Performance and Contracts Manager and I arranged a meeting to discuss our approach. We decided to initiate Performance Coaching. The pandemic is evidently a period of change and Coaching is deemed a suitable development tool when dealing with an impact of change on an individual's role (CIPD, 2020). Managers need to be transformed into coaches for employees to achieve success (Clifton & Harter, 2019). I facilitated a call with the Line Managers to clarify any questions they had and to ensure they were confident with delivering the support (EV17).

2.3 Work in conjunction with line managers in the provision of employee performance and development reviews.

I helped one of our Line Managers to create a Personal Development Plan (PDP) for an employee who had thoughts around progression, potential change of role and additional learning. We discussed suitable options (EV18). PDPs are learning action plans designed to achieve learning objectives for which the individuals are responsible with the support of their managers and the business (Armstrong, 2016). This individual had an interest in training and project management so we agreed that she support with the coordination and facilitation of induction for new colleagues.

Past performance tends to be at the centre of Performance Management discussions, however if enhancing performance is the goal then development must become a fundamental part of that discussion (CIPD, 2019). As part of my role I have supported Managers to deliver Learning and Development Plans for their teams. Rather than focus on individual development plans, we focused on a collective approach. It ensured there was a continuous focus on learning and development activities including induction, training, coaching and mentoring (EV 19).

Although the induction of an employee is the responsibility of the line manager, they would not be expected to cover all elements. The design, development and evaluation mainly sit with HR and/or L&D specialists (CIPD, 2019). I co-deliver induction sessions with Line Managers for all new starters. The day one call consists of a welcome to the business, introduction to their induction plan, what will be covered and expectations from both parties. I co-facilitate monthly check-ins with the Line Manager to review performance against induction progress. It's a three way conversation to ensure the induction is being followed and support and training are being provided. We continue with monthly check-in meetings until all three parties agree the induction is complete, the employee has the ability and knowledge to perform effectively and the induction can be signed off (EV20).

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EV13

Sophie O'Kelly <sophie.new@remploy.co.uk>

PL Training and Pre-Training Questions - Please can you let me know your feedback?

Sophie O'Kelly <sophie.new@remploy.co.uk> 9 September 2019 at 16:58
To: Drew Smith <drew.smith@remploy.co.uk>

Hi Drew

So I've spent time with Sam and Paul individually to discuss what PL training needs to consist of:
This is a quick overview of our thoughts.....

We made a decision to focus on the tools that managers should be using to drive performance in their teams.

The general feeling is that these tasks when they are being completed aren't being completed consistently; they are being used as more of a tick box exercise (so non-productive); they aren't being done effectively to support their staff and **drive performance**; and essentially Managers do not understand the benefits of using these tools. There is also a concern that Managers are not confident having difficult conversations with their teams or understand how to support their teams where this is required.

1. **Observations & Coaching** (I will lead this session)

- Discussion around Managers Process to date (how they complete observations, what they get out of them etc....)
- Use a 'real life example' of an observation that has been completed - maybe amalgamate a few so it's not obvious who has done what
- Groups to work together to discuss, analyse and feedback on the completed observation.
- Discuss Observation Principles and How to complete the form.
- I will create an additional form to support with completion of observations demonstrating examples of statements for good and bad observations.
- Discussion around Feedback/Having Difficult Conversations and Actions from observations
- Touch on how to coach and support teams following poor observations.

2. **1:1s/Caseload Reviews** (will make a decision following the Senior Meeting as to who should lead this session)

- **Content to be discussed and agreed at Senior Meeting.**
- Discussion around Managers Process to date (how they complete them, what they get out of them etc....)
- How do they test knowledge? How do they know they fully know their caseload?
- How do they do complete a caseload review for 70 customers? How are their discussions driving performance?
- Is there a focus on pipeline jobs and activity or is it just a discussion around gaps on the Cohort Simplifier and setting actions that never get revisited?
- Question whether Caseload Reviews and 1:1s should be done together?
- What forms are we using for all? Need consistency?
- How do we know they are driving performance?
- What conversations are we having with under performers?

3. **Reports/Dashboards** (unsure if Reports fits into the theme of the day as much as they should be being used to drive performance - to fully understand the detail and benefit this may be a days training at a later date? Open for discussion but mindful of information overload)

- Overview of Key Reports
- Why they should be used (PLs to discuss)
- How frequently they should be used
- Actions/Objectives
- Potentially create a task for Managers to look at reports for another branch and feedback to the group the key highlights/areas of concern that they have found and what the areas of focus need to be for that branch? Tests their ability to analyse reports.

4. **PL Priorities**

- Reflection
- Do More Of/Less Of/ Stop Doing/Start Doing

- Discussion and agree priorities
- PL Calendar?
- Time Management

5. **Next Steps**

- Monitor PLs undertaking Observations and providing feedback/coaching
- DPMs dip sampling Caseload Reviews and 1:1s
- PLs to organise their calendars

Apologies for lengthy email, can you please let me know your thoughts as I plan to give this as an overview in Senior Meeting next week and use it to set the scene ahead of the task so want to make sure I am on the correct path?
I also have attached the questions I have drafted for PLs (as requested) to gauge if training is focused on correct areas or if we may need to add additional elements in? Again can you let me know if you agree or need me to make any changes.
Thanks so much

Sophie

--

Sophie O'Kelly

Performance Improvement Manager

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PL Pre Training Questions Sept 19.docx
100K

EV14

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Work and Health Programme Wales

Performance Lead – Pre-Training Questions

1. What are your daily, weekly and monthly priorities?
2. How do you drive performance?
3. How do you manage underperformance?
4. Tell me the last time you had a difficult conversation with an Employment Advisor and what was the outcome?
5. Talk me through how you prepare for and induct new starters into your team?
6. What training and development have you provided to your teams either individually or as a group?
7. What training and support have you had from your line manager?
8. Talk me through your approach for observing your staff.
9. Define an effective Caseload Review and 1:1
10. Which task(s) do you find the most challenging and why?
11. Which task(s) do you find the most time consuming and/or non-productive and why?
12. Which tasks are you least confident in undertaking and what have you done to improve your confidence in this area?
13. Talk me through how you effectively communicate with your team.
14. How do you ensure all your customers are seen weekly?
15. There are no customers in branch from 3pm onwards. How can you evidence this isn't the case?
16. Is there anything else you'd like to add?

EV15

Remploy Cymru | Work and Health Programme Wales

Work & Health Programme – Performance Lead Training

Date of Meeting	Tuesday 15th & Wednesday 16th October 2019
Venue	Remploy Ltd, 1st Floor 40 Windsor Place Cardiff CF10 3BW

Day 1

Timings	Session	Host
10:00am to 10:15am	Introduction & Expectation Setting	Sophie O'Kelly
10:15am to 10:45pm	Introduction to the Customer Journey Re-launch	Drew
10:45am to 12:45pm	Performance Management Framework • Performance expectations template • Metrics review & one-to-one • Caseload review and forecast for caseloaded roles • Work plan for non-caseloaded roles • MMR for managers • Rolling action plan for all staff which can escalate to capability process • Early intervention template	Ed
12:45pm to 1:30pm	Lunch • Buffet to be provided	
1:30pm to 3:30pm	Dashboards & Reports • Overview of Key Reports ✓ Performance Overview Dashboard ✓ DWP Contractual Dashboard ✓ Cohort Simplifier ✓ Attrition Report ✓ Pipeline Report ✓ Activity Report • The importance/benefits of using them • How often should they be using them?	Pete & Paul
3:30pm to 4:00pm	Observation Process • Observation Principles to be discussed • Process of how to complete observation form to be clarified • Open discussion around level of confidence in having 'difficult conversations' • Group Exercise – review an example observation and provide feedback	Samantha

Day 2

Timings	Session	Host
9:30am to 11:30am	Caseload Review & Observations – Practical Exercise	Paul & Sophie
11:30am to 1:00pm	Reports & Dashboard – Practical Exercises	Paul & Sophie
1:00pm to 1:30pm	Lunch • Buffet to be provided	All
1:30pm to 2:30pm	Feedback & Discussion • PL's to provide feedback on the training • Practical next steps & application • Priorities • What other support or training do you need? • Observation & Support – T & D	Sophie O'Kelly
2:30pm to 3:00pm	Summary & Close	Caroline

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MAXIMUS | United Kingdom

EVI9

WHP Wales / IPES Wales – Enhanced Support Plans

Sophie O'Kelly

March 2020

Agenda

- Re-cap of New Performance and Support Management Framev
- Overview of Enhanced Support Plan
- How to discuss its purpose with Employees
- Devising the plan
- Recording on Ignite
- Next Steps

Re-cap

- Oct 2019 - rolled out the new Performance Support and Management Frar

  including:

  - ✔ Caseload Review & Forecast Template
  - ✔ Monthly Check-In & Metrics Review
  - ✔ Monthly Management Report (MMR) template
    - Enhanced Support Plan ???

Q: How many Managers are using the Enhanced Support Plan with their tea

Overview of Enhanced Support Plan

Enhanced Support

If the employee or manager feel that the underperformance can be addressed, but more support is required, a period of enhanced support may be appropriate in order to monitor progress more closely and ensure that the plan is on track. This may also be appropriate where an employee has not yet missed an expectation, but are forecasting to do so.

The manager and employee should document the expectations which have not been met and the specific actions agreed to address these in the next month on the OE006 Enhanced Support Plan. The manager and employee should review the plan regularly during the month, and the employee will be required to submit an update to the manger at least one day in advance of the review.

At the next monthly check-in review the manager and employee should discuss whether or not to continue with the enhanced support



- The word 'Support' is significant
- We need to ensure this plan isn't referred to as 'Performance Improvement Plan' (PIP) or 'Ignite Capability P it is neither at this stage
- Don't wait until an employee has missed a target before implementing a support plan
- Regular reviews of the plan are crucial
- As a Line Manager we have a responsibility to 'Support' our staff to achieve their targets
- If we don't put ' Support' in place to help individuals who are struggling, then we are not doing our jobs effect

How to explain it to your team

- This is possibly one of the more difficult tasks of People Management
- Addressing performance concerns whilst attempting to maintain staff morale can be a challenge
- We need to ensure the individual recognises that this is a 'Supportive Plan' to get the individual 'back
- The more frequently these plans are used, the more 'normal' they will become and the less negativity associated with them
- 'Trust' and 'Involvement' is important – ask what support is required
- Individual has to believe 'Enhanced Support Plan' is achievable and that the support on the plan will b and reviewed

Enhanced Support Plan

MAXIMUS | United Kingdom

Enhanced Support Plan

Staff Name:	Sophie O'Kelly
Job Role:	Employment Advisor
Contract:	WHP
Date of Review:	15 March 2020

Areas Requiring Support

Category	Expectation	Month Identified	Requirement	Achievement
Performance	X Job Starts	March 2020	8 Job Starts	2 Job Starts

- Please note: Enhanced Support is not purely for Performance concerns
- Support should also be implemented for concern
  - Compliance
  - Quality
  - KPI's
- Utilise the tool in the same way
- Keep the plan 'specific' and 'focused'
- Don't attempt to solve everything on one Suppo it becomes unachievable, overwhelming and v quality it requires.

SMART Actions

Action Title	SMART Actions	Start Date	Due Date	Update	Complete
Participant Activity	• All 'Green' Participants to have 3 face to face weekly appointments	16/03/2020	20/04/2020	Caseload review identified 10 'Green' participants All been invited in to 3 face to face weekly appointment Minimum DNA's – mainly successful contact I feel this is benefiting me and the participants. More frequent contact is prompting follow-up calls following submissions resulting in more interviews. All have also had at least 1 contact with the RAM	Yes

Ensure Actions are SMART - if an employee achieved 20% of target in the last quarter, to expect 100% in one month will be unrealistic

Implement Step Targets

Actions can not be generic – they need to be aligned to the individual and their working environment

Action considerations: Activity levels; Quality of Submissions; Interview numbers; Pipeline Development; Quality of CVs; Engagement with Employers; Confidenc

Engagement with RAM

Observations, File Checks, Caseload Reviews are vital to fully understand how to support your staff and if we aren't doing these frequently, the support provided

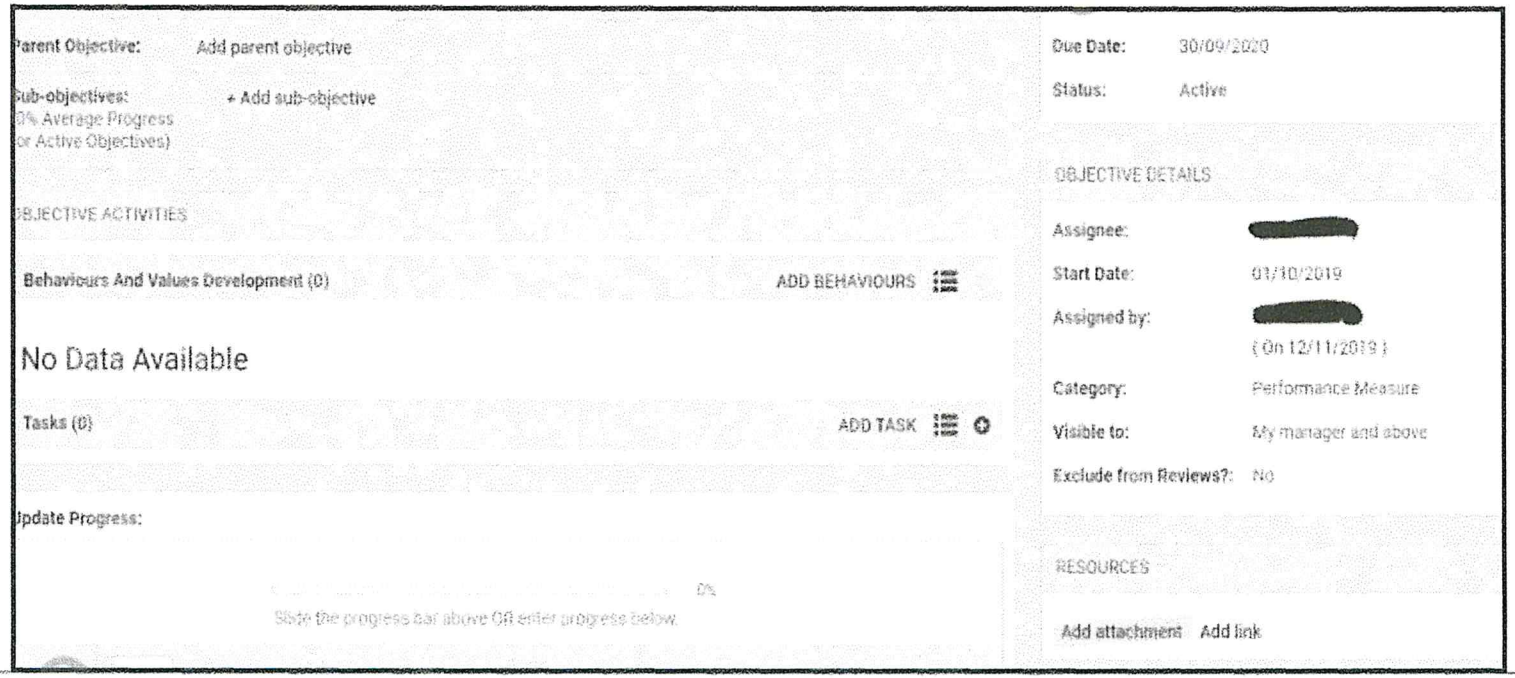
Spending time with your staff & providing coaching is probably one of the best forms of support they will receive

Enhanced Support Plan reviews must happen – ideally weekly

Utilise all support available – Talent & Development Support / Peer to Peer Mentoring

What Next…

- Enhanced Support is not part of the Ignite Capability Process *however* it should be documented during Check-
  'Enhanced Support Plan' is in place
- Once you've completed the 'Enhanced Support Plan' contact **People Manager** – they will review the plan for y
  suitability and make recommendations if necessary.
- Once agreed with Employee upload the plan (by clicking 'add attachment') linked to the most relevant objectiv



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EV17

Sophie O'Kelly <sophie.new@remploy.co.uk>

Performance Coaching

Sophie O'Kelly <sophie.new@remploy.co.uk> 31 July 2020 at 20:35
To: Howel Davies <howel.davies@remploy.co.uk>, Martin Walton <martin.walton@remploy.co.uk>, Karen Williamson <karen.williamson@remploy.co.uk>, Kylie Thomas <kylie.thomas@remploy.co.uk>
Cc: Samantha Harvey <samantha.harvey@remploy.co.uk>, Lisa Lewis <lisa.lewis@remploy.co.uk>, Paul Walters <paul.walters@remploy.co.uk>, Sharon Michaelson-Yeates <sharon.m-yeates@remploy.co.uk>

Hi All

Thank you for attending the call this morning. As mentioned earlier, Sam and I decided to host this call just to check you were comfortable with the Performance Coaching Approach and were provided with an additional opportunity to ask questions or request support.

I've attached the 'Coaching Tips for Line Managers' slides that Stephen King presented in May which provides you with more detailed information about Coaching and includes information about the 'GROW' model which is an effective framework for structuring coaching sessions which you may find useful.

If you have any questions about anything we discussed this morning or decide you need additional support at any time then please don't hesitate to get in touch.

Paul - you may want to share with your Performance Leads who weren't able to attend the call this morning.

Have a great weekend all,

Thanks

Sophie

--

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coaching tips for managers.pptx
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EV18

Sophie O'Kelly <sophie.new@remploy.co.uk>

[redacted] - PDP

Sophie O'Kelly <sophie.new@remploy.co.uk> 30 July 2020 at 14:03
To: Zoe Yeomanson <zoe.yeomanson@remploy.co.uk>

Hi Zoe,

Hope you're well.

Following on from yesterday's meeting, please see agreed draft objectives for [redacted]'s PDP based on the conversations you have already had with her in terms of her development and career aspirations:

- [redacted] to continue with her Advice and Guidance Level 4 Qualification (Personal Development)
- [redacted] to complete Prince 2 and Coaching/Mentoring training courses on Percipio (Personal Development)
- [redacted] to take a lead role in supporting Performance Lead with facilitation of their induction period (including potential delivery of training, planning observation time, mentoring) (Professional Development)
- [redacted] to explore innovative approaches to increase referral generation (Professional development)

We agreed that ahead of formalising the PDP it would be worth [redacted] completing a SWOT analysis which she can then review with you to ensure PDP is focused on areas that build on her strengths and develop any weaknesses identified and are in line with the opportunities available to her.

I will put a date in the diary for the three of us to review her PDP when finalised to check progress.

Have a lovely day off tomorrow - catch up with you when I'm back from leave.

Thanks
Sophie

–

Sophie O'Kelly

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EV19

Sophie O'Kelly <sophie.new@remploy.co.uk>

L&D Meetings Swansea and West Wales

Sophie O'Kelly <sophie.new@remploy.co.uk> 9 April 2019 at 16:45
To: Lisa Lewis <lisa.lewis@remploy.co.uk>, Howel Davies <howel.davies@remploy.co.uk>
Cc: Paul Lewis <paul.lewis@remploy.co.uk>

Hi Both

Thanks for your time today.

Discussion points at meeting attached along with updated action plan for Q3.

For both areas it is apparent that you have been through some significant changes in terms of employees leaving, recruiting new starters, induction process and training of new staff.

Priority has to be signing off inductions for those individuals that have been in the business for a period of time (These must be signed off ahead off probation sign off)

For those most recent new starters, their inductions are being followed and regularly checked with sufficient support and training put in place so thank you for all your efforts in driving this process in your teams.

Will book in next meeting but as always contact me anytime for any additional support not already listed on the action plan.

Thanks again

Sophie

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Sophie O'Kelly

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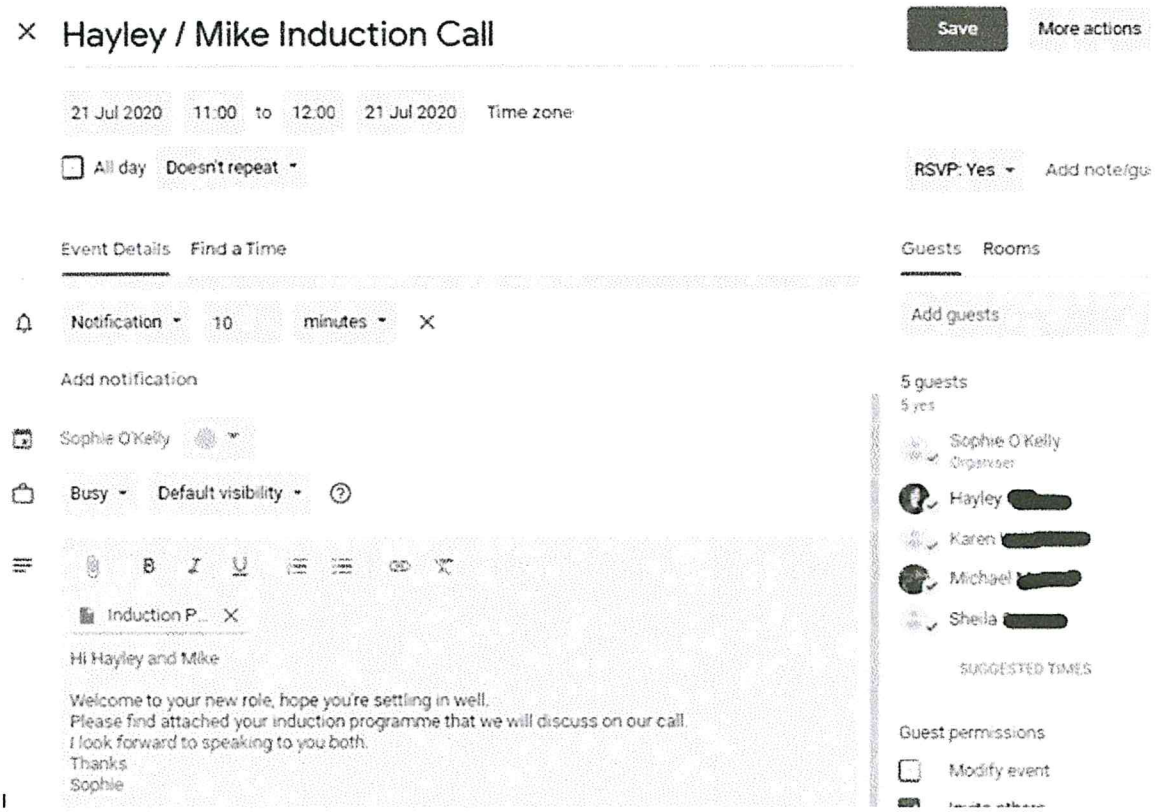
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2 attachments

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L&D Meeting West Wales 09.04.19.docx
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EV20


Hayley / Mike Induction Call
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Sophie O'Kelly
Sophie O'Kelly
Organiser
Hayley
Karen
Michael
Sheila
Busy
Default visibility
SUGGESTED TIMES
Induction P...
Hi Hayley and Mike
Welcome to your new role, hope you're settling in well.
Please find attached your induction programme that we will discuss on our call.
I look forward to speaking to you both.
Thanks
Sophie
Guest permissions
Modify event

Learning Outcome 3

3.1 Evaluate the organisation's approach to performance management, including employee performance and development reviews.

Remploy delivers Work and Health Programme in Wales on behalf of DWP and is in the top performance position (EV21). I held a meeting with the Performance and Contracts Manager to evaluate the organisation's approach to Performance Management (EV22).

Maximus' delivers a thorough induction with a robust training programme to ensure colleagues have the skills and knowledge to perform (EV10). Shea (1985, cited in Taylor, 2010) discusses how an effective induction invests in an employee's growth, learning and productivity, supporting the organisations long term productivity and success. SMART objectives are set at the beginning of the financial year (EV23). Taylor (2016) discusses how the continual shifting of organisational priorities questions the relevance of annual objectives. Performance is reviewed at monthly check-ins. Colleagues have an annual appraisal where a performance rating is delivered. Performance and Development are discussed during the same review however we need to evaluate whether it's appropriate to discuss strengths and development areas together (Taylor, 2016). It was determined that potentially more time could be invested in individual development discussions and personal development plans. Organisational performance relies on having employees with the right skills and providing learning opportunities can increase organisational effectiveness (CIPD, 2020). Reward and Recognition is another area which potentially could be enhanced. There is a colleague recognition toolkit available however usage of the toolkit is uncertain (EV5). Additional training may need to be considered. This stresses the importance of HR Specialists working closely with Managers to reinforce the tools available (Marchington & Wilkinson, 2012, cited in Hutchinson, 2013).

3.2 Assess the extent to which performance management processes support high performance working (HPW) and contribute to sustained organisational performance.

HPW can be achieved by developing a high performance culture through HPWS in which performance management is important (Armstrong, 2018). Maximus Colleagues have clear goals and understand their responsibilities (EV23). Maximus' mission statement is 'Helping People Transform their lives' (Maximus, 2008). Objectives are aligned to the mission statement and overall business strategy ensuring individuals are committed to achieving their goals. A High Performance Culture has a clear message that performance is important (Armstrong, 2018). One of the Maximus values is being 'Performance Focused'. Being ethical and honest is another important value which highlights the importance of giving feedback to help people develop (Maximus, 2016). Line Manager feedback within Maximus is continuous. Armstrong (2018) discusses that high performance is achieved through improving skills and ability through feedback, coaching and development planning. Information Transparency positively impacts employee commitment (Taylor, 2016). Maximus operates a dashboard system to allow visibility of performance against targets (EV24). Dagan (2007, cited in Armstrong, 2018) discusses how dashboards are a quick way for people to access how they are doing in terms of performance.

Effective Appraisals take place annually and performance is recognised through the colleague recognition toolkit which may take the form of a financial reward. This provides an incentive for employees to maximise their performance (Taylor, 2016). Recognition is necessary when it's earned and deserved and is important for creating a culture of high performance (Robbins, 2019).

Development discussions could benefit from more of a consistent focus. Investment in Training and Development is important to improve capability and allow employees to progress (Taylor, 2016). American Express and Google ensure learning features significantly within their Talent Management processes (Chamorro-Premuzic & Bersin, 2018)

3.3 Recommend ways for developing performance management processes to enhance their impact on organisational performance.

If Annual Appraisals were eliminated, employees would still continue to have monthly performance check-ins. Usually, performance reviews take place annually; however reviews should take place more regularly to have a positive impact (CIPD, 2019). An option could be to replace with 360 degree feedback as this widens opinion. 360 degree feedback is feedback is provided from a number of different sources (CIPD, 2019). Another recommendation would be to ensure Line Managers are adopting strengths based conversations when delivering feedback. To inspire exceptional performance, Leaders should lead with meaningful feedback as it increases the likelihood colleagues will grow and develop (Clifton & Harter, 2019).

Reviewing the Performance Management approach is already under consideration and one option being discussed is the removal of hard targets (EV23). This poses some risk, however Organisations that express a growth mind set encourage risk taking (Dweck, 2016). Linking performance metrics to strategy has become common best practice but organisations need to be mindful they don't lose sight of their strategy (Harris & Tayler, 2019). Performance management can isolate talented employees and taking away hard targets may release creativity to improve performance.

Feedback from a prior research study I conducted clarified what was important to colleagues. Teamwork was important; so it would be an interesting approach to pilot a team based target. Team based approaches empower groups to determine how they will achieve their objectives, promoting engagement (Taylor, 2016). The Line Manager relationship is really important for engagement; so a strong leader would need to be in place to truly assess the impact of the pilot. Gallup states that the Manager themselves determines 70% of the difference in team engagement (Clifton & Harter, 2019).

Separate development and performance discussion is another recommendation. Google separate the two; intrinsic motivation is essential to growth but a Performance Management system can destroy that motivation. Where you introduce extrinsic motivators, the ability to learn shuts down (Bock, 2015). The British Heart Foundation and MacMillan Cancer Support have created a sophisticated graduate programme for young talent so they always have a pipeline of talent for the future (Jacobs, 2017). A recommendation I made as part of my prior study was to implement a Talent and Development Support Programme (EV25). Recognition is a powerful form of reward, encouraging discretionary effort. Engagement is enhanced when colleagues are given a chance to learn, grow and progress (Armstrong, 2018).

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WHP - Comparative Performance Nov 18 to June 2020

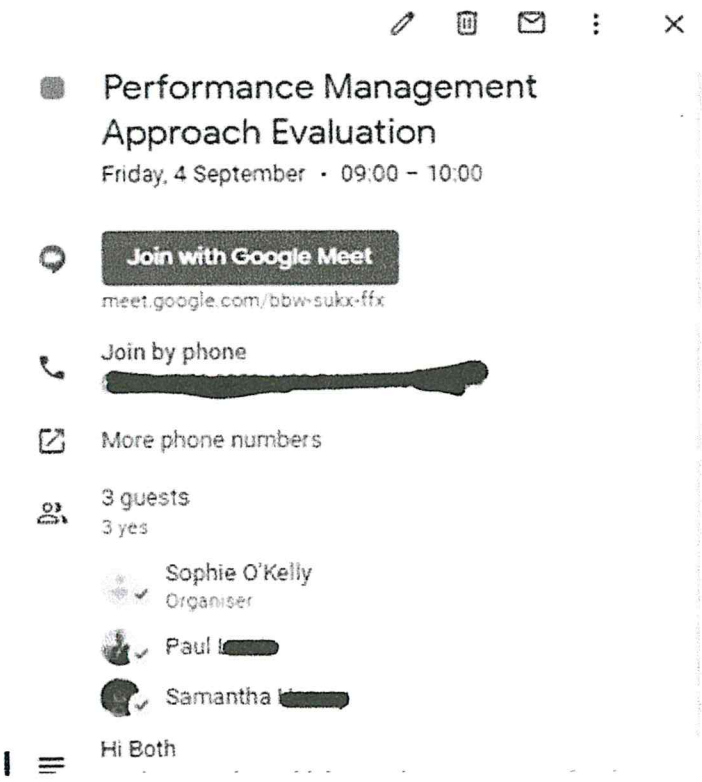
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EV21

15

EV22


Performance Management Approach Evaluation
Friday, 4 September · 09:00 – 10:00
Join with Google Meet
meet.google.com/bbw-sukx-ffx
Join by phone
[redacted]
More phone numbers
3 guests
3 yes
Sophie O'Kelly
Organiser
Paul [redacted]
Samantha [redacted]
Hi Both

EV25

6. Recommendations for change

McGrath (2019) highlights the importance of trusting the traditional concept of managing retention by implementing an exciting employee experience from the start. Remploy has already enhanced its recruitment and induction processes to improve staff retention. This research has enabled me to consider what the *next steps* should be on this journey.

I recommend we focus on innovative approaches to 'retain' our existing talent and pilot a 'Talent & Development Support Programme'. Traditionally organisations have focused on high potential individuals when implementing talent management programmes (CIPD, 2020). Henaghan (2019) discusses how it's more important to ensure everyone has the opportunity to be the best they can be. It is more common now for organisations to consider the talents of all of their staff and find ways to develop their strengths (CIPD, 2020). Due to the existing team ethic appearing to be one of the strongest factors influencing retention, this approach appears to be most appropriate. All employees will be given the opportunity to discuss their aspirations. CIPD research suggests creating a structured selection process to increase the perceived value of participating in the talent programme and motivation to perform once selected. For those who don't make the criteria, a planned and ongoing development plan must be implemented (CIPD, 2020).