Title: Contributing to the Improvement of Individual and Organisational Performance (5AIOP).

Name: Rhodri Packman

CIPD Membership Number: 4787112X

Date: 31/07/2019

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: Rhodri Packman

Date: 16/07/2019

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CIPD Candidate evidence matrix

(CEM1)

Candidate name: Rhodri Packman				CIPD Membership/registration No.:		
Qualification title: CIPD Diploma in Applied Human Resources						
Unit code	**Unit title**	**Assessment criteria no.**	**Evidence description**	**Evidence reference number**	**Assessor initials**	**I/V initials if sampled**
5AIOP	Contributing to Improvement of Individual and Organisational Performance	L01	*Achieve Overview Document.* This is a document provided to all staff and specifically to managers to help them identify the PM process and their role within it.	EV1		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Individual Achieve Sheet.* This is our version of an appraisal document and shows organisational objectives, team and individual objectives.	EV2		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Quarterly Data Analysis Report.* Highlighting specific targets for the EU funded programme. These are then broken down to team and individual level.	EV3		
	Contributing to Improvement of Individual and Organisational Performance	L01	*DNA document.* This forms part of the Achieve meeting. It highlights the values of Chwarae Teg and are included within the objectives as behaviours to be monitored.	EV4		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Completed 360 degree feedback.* This forms part of every Achieve meeting and gives employees and manager wider feedback.	EV5		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Capability and Performance Policy* The policy lays out Chwarae Teg's commitment to measuring capability and performance.	EV6		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Equality and Diversity Policy* The policy lays out Chwarae Teg's commitment to equality and stresses how the organisation ensures performance appraisals and training are	EV7		

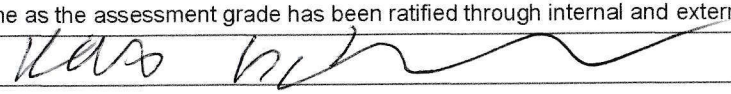
			applicable to everyone, regardless of gender, role or working hours.			
	Contributing to Improvement of Individual and Organisational Performance	L01	*Pay and Reward Policy* The policy lays out Chwarae Teg's commitment to pay and reward, regardless of gender, role or working hours.	EV8		
	Contributing to Improvement of Individual and Organisational Performance	L01	*HR Guidance Notes –performance or capability.* These Guidance Note detail the process from informal to formal, if performance/ capability issues are identified. In line with employment law and best practice, which inform all Chwarae Teg policies. It is provided to managers to help support employees through the process.	EV9		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Employee Induction PowerPoint – People strategy* This forms part of a wider induction process at Chwarae Teg, This document highlights a few hours of the induction given over to our People Policies and the importance we place on High Performance working.	EV10		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Induction slide – Achieve.* This forms part of the induction I carry out with new member of my team. Working through the Achieve format, what is involved, managers responsibilities and what needs to happen by the individual.	EV11		
	Contributing to Improvement of Individual and Organisational Performance	L01	*Modern Working Practices – training session handout (contents page).* This forms part of a training session I deliver to managers within the organisation. We look in detail at managers' responsibility, reviewing job descriptions and looking at how this practically works in the organisation. We also discuss how to encourage HPW within the organisation and the steps needed to make this happen, by all of us.	EV12		
	Contributing to Improvement of Individual and Organisational Performance	L02	*PDP from a Manager* A PDP was reviewed and showed that there were mentoring/coaching requirements. This triggered the use of mentors to managers to specifically look at the running of Achieve (performance reviews).	EV13		

	Contributing to Improvement of Individual and Organisational Performance.	L02	*Mentoring/Coaching spreadsheet* A spreadsheet I set up to match internal managers with internal potential mentors that were experienced in running performance management processes and reviews.	EV14		
	Contributing to Improvement of Individual and Organisational Performance.		*Managers induction training to PM* Part of a presentation that goes through with new managers, the role of achieve and more broadly what is performance management.	EV15		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Record of signing in sheet for a Performance workshop* Shows attendance by internal and external managers on how to manage the performance management process.	EV16		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Performance Workshop training notes – setting objectives.* These notes highlight the need for setting organisational objectives and feeding these down to individual SMART objectives as well as recording behavioural outputs.	EV17		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Performance workshop – feedback.* A training session for managers that investigates how to give positive and developmental feedback, as well as looking at feedforward mechanisms.	EV18		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Performance workshop – Feedback, the managers' role.* A training session for managers that starts with asking how they like to receive feedback and getting them to reflect on how they are providing information to employees during an appraisal.	EV19		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Achieve Scenarios.* Working with managers to ensure they are prepared for their achieve meetings by running through scenarios about what may be raised by employees.	EV20		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Steps for undertaking a difficult conversation.* 1 2 1 support is offered to managers, with typically coaching undertaken, working though how to manage having difficult conversations during an appraisal meeting.	EV21		

	Contributing to Improvement of Individual and Organisational Performance.	L02	*Notes from a meeting with a manager.* Notes taken at a meeting with a manager that outlined the support they needed. Specifically we discussed possible apprenticeships schemes following gaps in succession planning highlighted in an review meeting.	EV22		
	Contributing to Improvement of Individual and Organisational Performance.	L02	*Email re performance management.* An email from a manager outlining the success of an intervention in terms of performance management and the outcomes of the support.	EV23		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*Benchmarking Screenshot.* Benchmarking survey measuring Chwarae Teg against 3rd sector organisations in terms of staff attitude to HR, policies and procedures.	EV24		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*Minutes of lead meeting.* After survey results and discussions at SMT level Achieve and PM in general were put on the agenda.	EV25		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*Team Reward update email.* Weekly email to all staff highlighting team and individual successes.	EV26		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*Achieve Training plan manager's session.* Agenda for a manager specific training session on Achieve. Focusing on managers' skills and how to develop HPW.	EV27		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*Managers' targets evaluation.* A document used at a training session to remind managers how individual and team targets contribute to overall organisational goals.	EV28		
	Contributing to Improvement of Individual and Organisational Performance.	L03	*High Performing teams.* Part of a powerpoint used to in managers' training to push how much Chwarae Teg believes in HPW.	EV29		

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:**	31/07/19.

Notes on candidate evidence matrices

Candidates should be encouraged to develop a matrix indicating how their evidence relates to each unit/module and learning outcomes/assessment criteria. This helps advisors and assessors to support candidates to draw links between units and encourage cross-referencing and the possible multi-use of evidence.

Evidence matrices can be developed using the unit/module and learning outcomes/assessment criteria, giving candidates an opportunity to link their evidence to each outcome.

Another approach is to have a more generic form where candidates list evidence and tick relevant boxes to show coverage.

Whatever approach is employed candidates should be encouraged to complete these forms themselves and not expect assessors to do this for them.

L01 – Personal Statement

- **Explanation of organisation's policies & procedures, and roles and responsibilities of those involved in them.**

At Chwarae Teg we operate ROWE (results only Work Environment). ROWE is aimed at increasing employees' control over their work time and fostering team-level job redesign keying in on results, not time spent in meetings or at the office. ROWE began as an innovation developed and championed by insiders at Best Buy Co. in 2004 (Perlow and Kelly, 2014). HR employees created ROWE initially in response to a department's employee survey, which revealed that employees did not feel trusted.

ROWE claims that current work practices are unproductive and outdated; the solution is for employees to be "free to do whatever they want, whenever they want, as long as the work gets done," which will help employees be more focused, productive, and efficient at work while meeting their personal goals and responsibilities (Ressler & Thompson, 2008). In the case of Chwarae Teg this is founded on providing a flexible work environment (in line with organisational goals to increase gender equality) that enables the organisation to attract and retain from a much broader talent pool than the norms that artificially privilege breadwinners married to homemakers (Williams, et al 2016).

In Chwarae Teg flexibility is at the core of the organisational values and is integral to the work done to create a high performance work system, driving recruitment, team work, training, work-life balance and performance management in order to deliver on our organisational aims. As Messersmith et al (2011) identified: "there is a positive relationship between a variety of measures of high-performance work systems and various firm performance outcomes".

Chwarae Teg runs a process called 'Achieve' which measures performance and an individuals' contribution to their team and the wider organisation. A detailed overview of Achieve is given to all staff and is used at management training (***Evidence 1***). However, it works in the following way:

Chwarae Teg has a Strategic Plan which is reviewed annually and agreed by the Board. This sets out the vision and mission and our strategic priorities over a given period. Once this is agreed the operational detail is set out in our Annual Operating Plan and other documents related to specific projects and initiatives which sit under the Strategic Plan. The Leaders of different functions within the organisation work with their teams to translate these operational plans into team plans – setting out where their team contributes. These plans are then divided into individual plans which set out what each individual's contribution is. Through this process there should be a clear link between the work of the individual to wider operational objectives and ultimately to strategic organisational priorities.

The individual's contribution is captured in our Achieve Sheets (see ***Evidence 2***). These detail a backward and forward look over an agreed time period – at a minimum, quarterly, with monthly face-to-face or skype catch up between managers and employee. Each Lead meets with each person within their team individually and reviews set objectives that were agreed to be achieved in the last period and looks forward and agrees what objectives will be achieved in the next period. If some agreed objectives haven't been achieved, there is a conversation about why this is the case and if needed, they are moved into the next period.

Achieve is built into the Chwarae Teg ethos; it ties in with our external objectives (for my team this is partly the delivery of an EU funded project (***Evidence 3***). Outcomes are listed within the Achieve

documentation and a reviewed quarterly. Chwarae Teg's DNA is a core component of the objective setting process – all employees need to demonstrate they work within the values and specifics such as value to their team, supporting the whole organisation is also captured and discussed (see ***Evidence 4***– DNA as part of objective setting).

Part of the achieve process is about gathering feedback from others in the organisation, e.g. peers and subordinates. As Taylor and Woodhams (2016) suggest, there are issues with the process (would an employee give negative feedback to a manager?) but generally the process is looked upon favourably by managers and is useful to them and to the organisation. ***Evidence 5*** shows a completed 360 degree feedback form which is used within every achieve meeting.

Achieve is also referenced in our Capability and Performance Policy (see ***Evidence 6***), where the steps of poor performance are outlined and the role of the manager and the HR team are discussed. With equality and diversity being a core focus on what we deliver to external organisations, performance, and recruitment within Chwarae Teg is referenced in our Equality and Diversity Policy, (***Evidence 7***) ensuring everyone has access to appraisals (Achieve) in line with the Equality Act 2010. This is also true of our Pay and Reward Policy (***Evidence 8***).

- **Materials from providing information to colleagues**

In order to effectively run an Achieve meeting, managers/lead are provided with training and support in how to run an achieve meeting and are provided with Guidance Notes (See ***Evidence 9***). I have helped to shape this document and use these notes when conducting an Achieve meeting with people in my own team. These notes detail the process from informal to formal, if performance/ capability issues are identified. In line with employment law and CIPD best practice (CIPD, 2015) which inform all Chwarae Teg policies, any identified issues are always to be tackled informally first and the employee should be given an opportunity to improve, before proceeding to a formal process. It should also be noted that Achieve is not designed to address conduct issues. Misconduct is addressed immediately and are also flagged with HR for advice/ support, where appropriate.

Chwarae Teg has a formal induction process (***Evidence 10*** is a copy of part of the induction - highlighting Chwarae Teg's people strategy; performance, objectives, culture and engagement). As part of this process it was my role to explain to them what Achieve was and how it worked from the employee's perspective. I delivered a PowerPoint presentation (***Evidence 11***), which detailed the responsibility of the manager/lead and also what is required of the individual and how Achieve should be seen as a live document and an on-going process of personal and business growth, rather than a performance process that 'happens to them'.

Manager are also provided with advice and training to ensure they are fully aware of Chwarae Teg's core support for 'modern working practices' very much in line with Taylor and Woodhams (2016) list of requirements for HPW organisations. This support forms a workshop with managers which I deliver, running through a practical session on individual and management responsibility, reviewing job descriptions and looking at how this practically works in the organisation (see ***Evidence 12).***

References

CIPD (2015). Best to good practice HR: developing the principles. https://www.cipd.co.uk/Images/best-good-practice-hr-developing-principles-profession_tcm18-8731.pdf

Messersmith, J.G., Patel, P.C. and Lepak, D.P. (2011). 'Unlocking the black box: exploring the link between high-performance work systems and performance', *Journal of Applied Psychology*, Vol. 96 No. 6, pp. 1105-1118.

Perlow, L.A. & Kelly, E. L. (2014). 'Toward a model of work redesign for better work and better life'. *Work Occupation*, Vol. 41, pp. 111–134.

Ressler, C., & Thompson, J. (2008). Why work sucks and how to fix it. New York, NY: Penguin Group.

Taylor, S., & Woodhams, C. (2016) *Human Resource Management: People and Organisations*. London: CIPD.

Williams, J., Berdahl, J. & Vandello J. (2016). 'Beyond work-life integration'. *Annual Review of Psychology*, Vol. 67, pp. 515–39.

EV1

Chwarae Teg

ACHIEVE



Purpose

The purpose of this document is to provide information on Achieve: the name given to how we approach our work and time in Chwarae Teg.

The information is provided in three sections:

- The background explaining where the idea comes from and why we have developed and adopted it.
- The detail on how it works and fits within the organisational structure and other policies.
- Frequently asked questions reflecting issues that have been raised during its development.

Background

Much of how employers address the organisation of work comes from ideas developed during the 19th and 20th centuries for an industrial context. Today, many thought leaders question their compatibility with what employers and employees need to be effective in a modern context.

The command and control relationship between employer and employee that underpins the traditional approach to workplace management has been questioned for many years and as a result, many organisations have developed mechanisms which give employees greater flexibility such as time off in lieu (TOIL) or flexi-time. These terms are often used to mean different things in different sectors and employers. Although well intentioned, these can be seen as essentially "tinkering at the edges" plus they focus attention on time input and rather than on what is being achieved.

The traditional organisation of work also undermines employee effectiveness by suppressing elements necessary to human motivation. Daniel Pink's work in this area outlines how autonomy, mastery and purpose drive motivation:

- Autonomy – needing to be in control of what we are doing
- Mastery – an intrinsic drive to improving how we do something
- Purpose – feeling that what we are doing is contributing to something greater

Achieve has been developed as a method of working compatible with the needs of a modern workplace and workforce and is founded on research from diverse study areas including neuro-science, psychology and workplace analysis. Its aim is to improve organisational impact by maximising performance through building autonomy and accountability into the employer/employee relationship.

What we have developed has been significantly influenced by an approach developed in America and widely adopted across private sector companies particularly within the high-tech sector. This approach is known as ROWE: results only work environments.

Achieve Sheet

Notes for use:

The Achieve sheet is to be completed in advance of and in preparation for your quarterly Achieve meeting with your line manager. Please update your Achieve sheet during and following your Achieve meeting, as required, and send the final version to your manager following the meeting.

Key:

1 – Objectives and outcomes - Please use this table to list your objectives for the quarter and outcomes against your objectives. Objectives should be linked to Chwarae Teg's Strategic Objectives and DNA (see next page).

NB. The number of rows in Table 1 is just a guide. Rows can be added to and expanded as required.

At the end of the Achieve quarter and in preparation for your next Achieve meeting: Please update the outcomes column to reflect your performance against the objectives. Please send your completed sheet, including outcomes, to your manager as well as your new Achieve sheet in preparation for your next Achieve meeting.

2 - Other objectives and outcomes – for team, for me, for Chwarae Teg - This table is for objectives not listed in table 1. Again, objectives should be linked to Chwarae Teg's Strategic Objectives and DNA (see next page).

For my team (objectives for your team members – e.g. staff that you line manage); **For me** (any personal objectives, development, CPD) and; **For Chwarae Teg** (any objectives for the wider business, not already captured).

3 – Feedback and reflection on performance and behaviour – this section should be completed by **both employee and manager.** It should summarise the conversation during the Achieve meeting around performance and behaviour during the Achieve quarter, including highlights and development areas. It also includes a section for **360 degree feedback from key stakeholders (e.g. colleagues/ clients).** Please refer to guidance note on 360 degree feedback for information on the 360 degree feedback process.

4 – Looking forward - career and development - Please use this section to summarise your career conversation with your manager. Where training/ development needs are identified, please complete a training request form in conjunction with your manager and send to HR.

EV2

Women	Year 3		Year 3 Total to date	Year 4				Year 4 Total to date	Year 5				Year 5 Total to date	Year 6	Year 6 Total to date	Project Tota
West Wales & Valleys	Q3	Q4		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		Q1		
Programme Results Indicator																
Participants gaining a qualification upon leaving	549	65	614	123	125	0	170	418	170	170	0	170	510	101	101	1643
Claimed To date	***549***	**72**	**621**	**72**	**84**	**35**	**107**	**298**	**104**				**104**		**0**	**1023**
Employed, including Self-Employed participants with an improved labour market situation upon leaving	102	83	185	72	80	67	86	305	0	86	86	86	258	51	51	799
Claimed To date	***102***	**45**	**147**	**31**	**30**	**39**	**23**	**123**	**81**				**81**		**0**	**351**
Common Outcome Indicators																
Participants (employed inc. self-employed) - female	920	164	1084	210	175	168	170	723	115	110	35	0	260	0	0	2067
Claimed to date	***920***	**119**	**1039**	**116**	**128**	**110**	**181**	**535**	**135**				**135**			**1709**
Participants (employed inc. self-employed) - above 54	12	73	85	92	77	74	75	318	51	48	15	0	114	0	0	517
Claimed To date	***12***	**3**	**15**	**4**	**5**	**13**	**10**	**32**	**2**				**2**			**49**
Participants (employed inc. self-employed) - Disabled	30	28	58	36	30	29	29	124	20	19	6	0	45	0	0	227
Claimed To date	***30***	**5**	**35**	**7**	**4**	**6**	**7**	**24**	**5**				**5**		**0**	**64**
Participants (employed inc. self-employed) - work-limiting health condition or disability	22	3	25	4	3	3	3	13	1	1	1	0	3	0	0	41
Claimed To date	***22***	**3**	**25**	**3**	**5**	**19**	**11**	38	**4**				4			67
Participants (employed inc. self-employed) - with care/childcare responsibilities	364	125	489	160	134	129	130	553	87	84	27	0	198	0	0	1240
Claimed To date	***364***	**50**	**414**	**46**	**49**	**33**	**94**	**222**	**63**				**63**		**0**	**699**
Participants (employed inc. self-employed) - working part-time	111	75	186	97	81	77	78	333	53	51	17	0	121		0	640
Claimed To date	***111***	**32**	**143**	**35**	**30**	**94**	**52**	**211**	**38**				**38**		**0**	**392**
Participants (employed inc. self-employed) -under 25	115	1	116	2	2	1	1	6	1	1	0		2		0	124
Claimed To date	***115***	**18**	**133**	**25**	**22**	**63**	**18**	**128**	**16**				**16**		**0**	**277**
Participants (employed inc. self-employed) - who are migrants, people with a foreign background minorities (including marginalised communities such as the Roma)	39	9	48	12	10	10	10	42	6	6	1		13		0	103
Claimed To date	***39***	**14**	**53**	**11**	**4**	**14**	**12**	**41**	**3**				**3**		**0**	**97**
Other Indicators to achieve the operation's aims																
Participants entering further learning within 6 months of completing the programme	58	34	92	43	36	34	35	148	24	23	8		55		0	295
Claimed to date	***58***	**33**	**91**	**17**	**18**	**12**	**14**	**61**	**33**				**33**		**0**	**185**

Business Programme	Year 3		Year 3 Total to date	Year 4				Year 4 Total to date	Year 5				Year 5 Total to date	Year 6	Year 6 Total to date	
West Wales & Valleys	**Q3**	Q4		Q1	Q2	Q3	Q4		Q1	Q2	Q3	Q4		Q1		
Programme Results Indicator																
Supported enterprises having adopted or improved E&D strategies and monitoring systems	187	16	203	20	21	27	27	95	27	21	27	8	83	0	0	381
Claimed to date	**187**	**28**	**215**	**15**	**13**	**25**	**15**	**68**	**19**				**19**		**0**	**302**
Common Outcome Indicators																
Number of Micro, small and medium sized enterprises supported	270	26	296	32	26	32	36	126	33	26	34	0	93	0	0	515
Claimed to date	**270**	**17**	**287**	**18**	**35**	**23**	**26**	**102**	**26**				**26**		**0**	**415**
Projects integrating sustainable development into awareness raising, education and training programmes	44	4	48	4	4	4	4	16	4	4	4	1	13		0	77
Claimed to date	**44**	**6**	**50**	**5**	**3**	**5**	**3**	**16**	**4**				**4**		**0**	**70**
Other Indicators to achieve the operation's aims																
Participants achieving/maintaining Exemplar Employer	45	3	48	5	5	6	7	23	7	5	6	1	19			87
Claimed to date	**45**	**16**	**61**	**9**	**7**	**6**	**3**	**25**	**3**				**3**			**89**
Number of individuals from participating micro, small and medium sized enterprises supported to working differently	657	0	657	0	0	0	0	0	0	0	0	0	0	0	0	657
Claimed to date	**657**	**71**	**728**	**212**	**309**	**222**	**123**	**866**	**331**				**331**		**0**	**1925**

EU3

As above, please link your Achieve Objectives and outcomes to Chwarae Teg's Strategic Objectives and DNA:

Our Strategic Objectives:

Women in Economy	Women at Risk	Women Represented
• Aim: Women achieve and prosper across all sectors and at all levels in the economy	• Aim: Women are empowered to achieve their potential, regardless of background, social status or geographic location	• Aim: Women are visible & influential across all sectors of the economy, society and in public life

Our DNA:

We are **ambitious** – as individuals, as an organisation and for those we work with.

We are **pioneers** – we build and use our expertise to make Chwarae Teg and our partners more successful.

We are **dynamic** and **resilient** – we are impatient for change and we don't take no for an answer!

We are **one united team** – we help and challenge each other to do the best job possible.

We are **innovative** – we have fun being creative in getting results.

EV4

3 – Reflection on performance and behaviour - 360 Degree Feedback

Please choose at least 2 key stakeholders to request 360 degree feedback from, as determined with your manager. Please attach all feedback to your Achieve sheet.

Summary of feedback:

Feedback from: (name)		I should start...	I should continue...
Caroline Mathias	Being too busy for handover meetings. We need to make time to meet every month, sometimes we get so busy they slip. We are both guilty of this. Send me dates and we can book ahead.	Getting on top of your emails - my mantra is deal with it or delete it. CT likes a lot of emails but sometimes you miss stuff, make it a 2019 habit to sort out.	Being versatile and professional - the work you deliver is so varied now and so geographically spread you do a great job juggling it all and from Nursey to Accountant you deliver appropriately to different audiences. I have every faith in you when I tell the client you will be in contact next and I know we work well as a team. Our recent thank you from Wrights food emporium was proof that this is the case.
Joanne Fitzpatrick	Trying to be perfect! We have targets to hit and not every client will do everything we think they should. Take a step back to realise this.	Sharing more of the knowledge you have with the team	Being professional! The support you offer is very good and thank you!

EV5

EV6

Chwarae Teg

Capability and Performance Policy and Procedure

Introduction

The Capability and Performance Policy and Procedure provides a framework within which managers can work with employees of Chwarae Teg to maintain satisfactory performance standards and to encourage improvement where necessary.

Concerns over performance should be dealt with fairly and steps taken to establish the facts. Employees should not be dismissed or subjected to formal sanctions for poor performance unless they have been given a written statement of the reasons for concern, a fair hearing has been held and they have been given the right to an Appeal hearing.

Employees will not normally be dismissed for performance reasons without previous warnings. However, in serious cases of gross negligence, or in any case involving an employee who has not yet completed their probationary period, dismissal without previous warnings may be appropriate.

This procedure applies to all employees regardless of status or length of service. This procedure is for guidance only and does not form part of your contract of employment. We may vary the procedure including any time limits as appropriate to a particular case and will inform you if this is necessary.

Informal Stage

In the first instance, performance issues should normally be dealt with informally between you and your manager as part of day-to-day management. Informal discussions may be held with a view to (for example):

- clarifying the required standards;
- identifying areas of concern;
- establishing the likely causes of poor performance and identifying any training needs;
- setting targets for improvement; and/or
- Agreeing a time-scale for review.

The formal procedure should be used for more serious cases, or in any case where informal discussions have not resulted in a satisfactory improvement.

Formal Stage

A capability hearing will be held at each stage of the procedure. Unless it is impractical to do so, we will give you a minimum of 3 working day's written notice of the date, time and place of the capability hearing.

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EV7

CHWARAE TEG - Equality and Diversity Policy

The Equality Act 2010 makes it unlawful for an employer or an employee to discriminate against or treat an individual differently on the grounds of any of the following nine protected characteristics - age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marital status/civil partnership and pregnancy and maternity.

Chwarae Teg is committed to taking positive steps to promote and sustain equality and diversity amongst its trustees, employees and in the services it provides. Chwarae Teg intends to promote this policy both inside and outside the organisation. Overall responsibility for implementing the policy lies with the Chief Executive.

Employees will be employed on the basis of their suitability for the work to be performed. They will have equal access to development and promotion depending on their individual ability and aspirations regardless of gender, marital status, sexual orientation, colour, race, ethnic origin, nationality, language, age, political and religious beliefs, HIV status or disability.

Service delivery
In accordance with this policy Chwarae Teg will ensure that its services are appropriate and accessible to and inclusive of all sections of society. Discrimination, whether direct or indirect and on any grounds, in the delivery of any of Chwarae Teg's services is unlawful.

Chwarae Teg will ensure equality of opportunity in its service provision by:

- reviewing service provision in terms of its impact on equality
- developing service delivery guidelines that reflect Chwarae Teg's commitment to equality of opportunity
- applying the principles of equality when determining Chwarae Teg's priorities
- responding flexibly and imaginatively to requests for service
- monitoring and reporting incidents where this policy has not been followed
- working towards meeting the needs of the Disability Discrimination Act
- ensuring that all Chwarae Teg buildings and external venues are accessible.

Organisations and others who use Chwarae Teg services and take part in Chwarae Teg activities will be informed of Chwarae Teg's commitment to equality of opportunity and the existence of this policy. Partnership & Stakeholder organisations and those that provide services to Chwarae Teg will be expected to develop and implement an equality and diversity policy of their own.

Recruitment and selection
Recruitment and selection will be conducted in line with Chwarae Teg's recruitment and selection policy and this equal opportunities policy. All vacancies will be advertised in line with the recruitment and selection procedure.

All person specifications will include only requirements that are justifiable for the effective performance of the job. Selection decisions at all stages must be based on the relevant merits and abilities of candidates to meet the requirements of the person specification. Reasonable adjustments will be made during the selection and appointment process where required.All Board members and staff involved in the recruitment process will be offered training in equal opportunities.

Employee development
Selection of employees for further development will be on the basis of organisational, role and individual need and potential for development. Recognition will be given to individual's personal circumstances e.g. carer responsibilities and the requirements that Chwarae Teg may need to meet in order for all employees to have equal access to employee development opportunities.

Supervision and appraisal
Supervision and performance review arrangements will be undertaken for all employees in accordance with this policy.

EV8

CHWARAE TEG **Total Reward Policy**

Introduction

Chwarae Teg offers an exciting, stimulating and dynamic place to work and recognises that Reward is about more than financial remuneration alone. We are committed to offering a package that is regularly benchmarked against the wider employment market and in doing so enables employees to fully quantify the true value of the Total Reward package offered. Chwarae Teg is committed to ensuring that the management of reward complies with not only the letter of employment legislation but also the spirit, a commitment which is an important part of our DNA and one that is intended to contribute to Chwarae Teg being a great place to work.

The following policy details each element of the pay and reward package on offer to all employees at Chwarae Teg.

Strategy

Chwarae Teg is a leader in the Welsh equality movement and in the Welsh charity sector generally. It is important that what we do internally lives up to and supports our external campaigning and position. We also see pay and reward as key to supporting and advancing our business objectives.

Chwarae Teg's pay and reward strategy:

- Aligns pay and reward with our charitable aims and the business strategy, reflecting our vision and mission to build a Wales where women achieve and prosper.
- Ensures fairness, rewarding roles fairly and lawfully, avoiding any form of discrimination and ensuring equal pay.
- Ensures people are paid at the appropriate rate for the demands of the role and the skills required carrying out the role within a leading member of the charity sector in Wales.
- Maximises clarity, equity and objectivity for Chwarae Teg's employees in relation to remuneration and career progression.
- Enables us to recruit, retain and motivate suitably qualified staff.
- Rewards staff appropriately and fairly where we ask them to deliver above the requirements of their current role.

Chwarae Teg's strategy on Reward Management recognises that reward is about more than financial remuneration only. We have developed our approach to reward in the knowledge that it will have a direct effect on organisational culture, employee motivation, performance levels, recruitment and retention.

EV9

Chwarae Teg

ACHIEVE

HR Guidance Note: Performance/ Capability issues identified through Achieve

Related Documents:

This Guidance Note should be read in conjunction with the relevant supplementary documents, available in the HR section on SharePoint:

- Achieve Guidance Note
- Achieve sheet
- Capability and Performance Policy
- Disciplinary Policy

Introduction:

Chwarae Teg strives to be a high performance organisation and while Achieve is not a performance management tool, it helps to facilitate regular conversations between leads/ managers and employees about expectations, objectives and performance. By documenting SMART Achieve objectives and measuring output during Achieve meetings in an agreed timescale (meetings should take place at least quarterly), leads/ managers can review performance and output against objectives and identify under-performance/ capability issues.

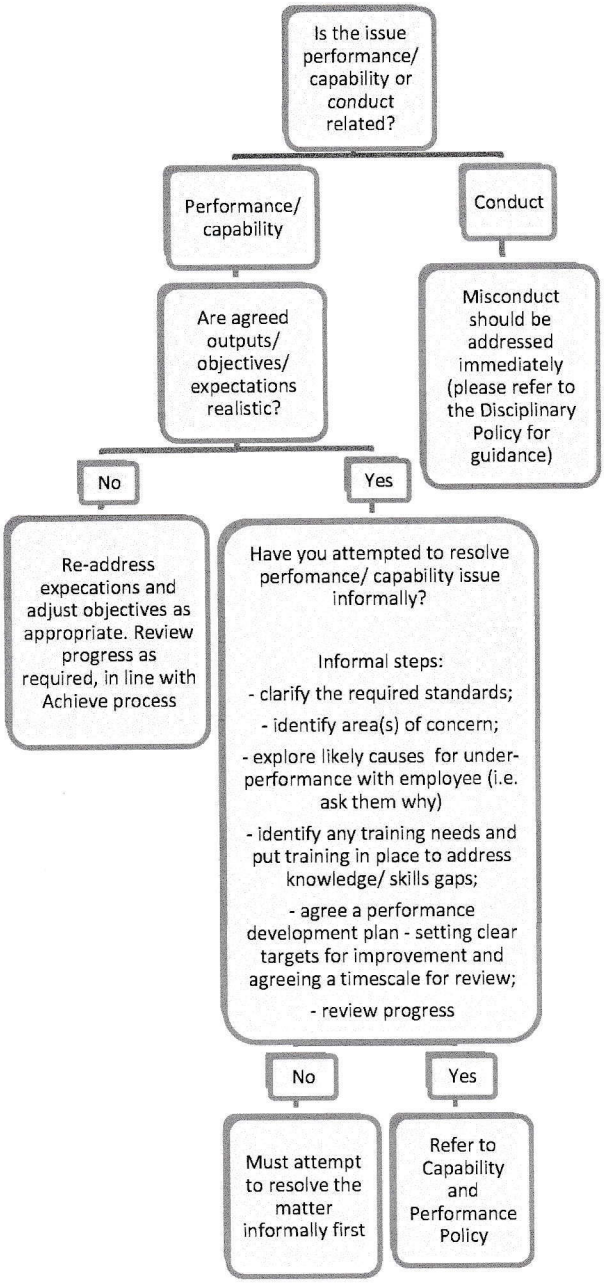
This Guidance Note details the process from informal to formal, if performance/ capability issues are identified. In line with employment law and best practice, which inform Chwarae Teg policies, any identified issues should always be tackled informally first and the employee should be given an opportunity to improve, before proceeding to a formal process.

It goes without saying that Achieve does not replace the manager-employee relationship/ psychological contract – if a lead/ manager identifies performance/ capability issues, they should tackle this in a timely manner, rather than wait for the next Achieve meeting. It should also be noted that Achieve is not designed to address conduct issues. Misconduct should be addressed immediately (please refer to the Disciplinary Policy for guidance).

A standard process from informal to formal is detailed over-page. Matters should also be flagged to HR for advice/ support, where appropriate.

EV9.

Process:


Is the issue performance/ capability or conduct related?
Performance/ capability
Conduct
Are agreed outputs/ objectives/ expectations realistic?
Misconduct should be addressed immediately (please refer to the Disciplinary Policy for guidance)
No
Yes
Re-address expecations and adjust objectives as appropriate. Review progress as required, in line with Achieve process
Have you attempted to resolve perfomance/ capability issue informally?
Informal steps:
- clarify the required standards;
- identify area(s) of concern;
- explore likely causes for under-performance with employee (i.e. ask them why)
- identify any training needs and put training in place to address knowledge/ skills gaps;
- agree a performance development plan - setting clear targets for improvement and agreeing a timescale for review;
- review progress
No
Yes
Must attempt to resolve the matter informally first
Refer to Capability and Performance Policy

People Strategy - Key Priorities

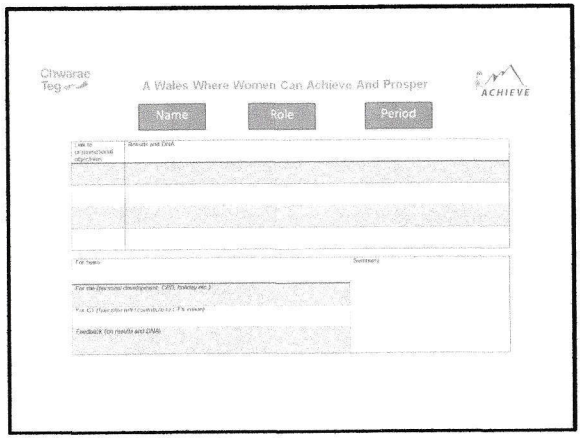
Key Priorities for Chwarae Teg People are:

- Culture
- Organisational Development
- Organisational Structure
- Reward & Recognition
- Governance

There are a number of specific elements within each of these, which will be presented over the following pages.

Chwarae Teg

EV10



Paperwork
Up to you and your lead to decide when achieve conversations take place

New achieve sheet on SP – April 1st

At the end of the Achieve quarter and in preparation for your next Achieve meeting: Please update the outcomes column to reflect your performance against the objectives. Please send your completed sheet, including outcomes, to your manager as well as your new Achieve sheet in preparation for your next Achieve meeting.
2 - Other objectives and outcomes – for team, for me, for Chwarae Teg - This table is for objectives not listed in table 1. Again, objectives should be linked to Chwarae Teg's Strategic Objectives and DNA (see next page).
For my team (objectives for your team members – e.g. staff that you line manage); **For me** (any personal objectives, development, CPD) and**; For Chwarae Teg (**any objectives for the wider business, not already captured).

3 – Feedback and reflection on performance and behaviour – this section should be completed by **both employee and manager.** It should summarise the conversation during the Achieve meeting around performance and behaviour during the Achieve quarter, including highlights and development areas. It also includes a section for **360 degree feedback from key stakeholders (e.g. colleagues/ clients).** Please refer to guidance note on 360 degree feedback for information on the 360 degree feedback process.

4 – Looking forward - career and development - Please use this section to summarise your career conversation with your manager. Where training/ development needs are identified, please complete a training request form in conjunction with your manager and send to HR.

EVII

EU12

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LO2 – Personal statement

Be able to support line managers to deliver performance management activities within the organisation.

Learners should analyse (using methods such as: examination of existing TNA information, examination of performance management outcomes, direct consultation with managers or employees) the types of support needed by line managers, in their own organisation, in relation to performance management activities (see list above).

Learners should go on to provide support (e.g. specific advice, coaching, guidance or training) aimed at developing line manager capabilities in performance management activities.

Rees and French (2016) are clear that successful organisations view performance management as a strategic issue and not a tactical one. With this in mind there is a clear role for HR within the performance/appraisal process. HR should support managers, who have a variety of on-the-job tasks, social and psychological issues to take into account when carrying out a performance appraisal (Gruman and Saks, 2011).

Internal Chwarae Teg staff and External managers need support to run an achieve session and a performance management system. Internally, training needs are identified in a Personal Development Plan (PDP) which is an outcome of an internal achieve meeting, or an external appraisal or discussion. ***Evidence 13*** is a PDP from an internal manager at Chwarae Teg that highlighted the need for training in running an Achieve meeting and also brought up the idea of using internal mentors to help line managers/leads manage better.

Mentoring is important and has become a necessary component of an organisation's efforts to improve quality. While some mentoring services are provided by external consultants or coaches, many large organizations also provide coaching practices by internal HRD professionals, supervisors and managers (Joo et al, 2012).

With this as backdrop at Chwarae Teg we run an internal mentor scheme to link skills used prior to staff working within Chwarae Teg to current and future requirements to assist with learning and development, specifically as part of my role, to assist with improving performance reviews. ***Evidence 14*** shows a spreadsheet set up to match managers with potential internal mentors/coaches.

As mentioned, training needs were also identified in the PDP review. Taylor and Woodhams (2016) are clear that managers need training in how to conduct performance reviews. As Harris (2001) states "The architects of strategic performance interventions are reliant on line management to transmit the desired corporate messages but line managers have also been identified as the weak link in the application of performance management systems".

To this end the provision of training to managers on how to manage the performance management process is crucial. Appraisal training is highly participatory (Taylor and Woodhams, 2016), therefore ***Evidence 15*** highlights to role I play in the induction of new employees (those with performance management responsibilities) into the team. It is often forgotten that just because someone is a manager, it doesn't mean they have the skills to manage.

The HR intervention does not end with induction. Kuvass et al (2014) highlight that managers need support throughout an employee's journey as this will impact the psychological contract and will strengthen managers' and employee's commitment to the organisation.

Both internally and externally of the organisation I run performance management workshops to ensure that managers are fully aware of the performance process and their role in its successful delivery. ***Evidence 16*** is a copy of a sign in sheet that shows a workshop I ran was attended by both external clients and internal colleagues. Attendees were managers needing more support in the performance process, and to help them develop their personal capabilities and to work through shaping their own performance management processes to make them more effective and in line with High Performance Working frameworks.

As part of these workshops I detail the role of PM in delivering organisational objectives and investigate the setting of specific SMART objectives (output based assessments) and review behavioural assessments too to measure general conduct as well as more quantifiable data (Taylor and Woodhams, 2016). ***Evidence 17*** is a practice session we work through on how to set SMART objectives.

Further training is provided in another workshop for managers. This is more detailed and provides specific support to ensure managers have the information and confidence they need to be comfortable delivering performance review/appraisal meetings and giving feedback to employees. Rees and French (2016) suggest that there is an issue with enabling managers within a performance management process. They suggest many managers do not recognise the value of constant feedback, both positive and developmental, and must be better at acknowledging when employees meet (not just exceed) standards. The research also highlights the crucial role managers have in giving feedback. ***Evidence 18*** shows the training I provide on how managers like to receive feedback and should give feedback. ***Evidence 19*** highlights managers need to be trained to provide positive affirmation and developmental feedback and the feedforward process (Kluger and Nir 2009).

Learners should also provide direct assistance (e.g. systems development, documentation, administrative support, co-delivery, co-ordination of activities, collation and analysis of outcomes) to managers in the delivery of staff performance and development reviews.

Providing on-going support to managers in their delivery of performance management/achieve is important if they are to remain successful; both the employee and the manager need to be fully behind the process, comfortable in how it works and confident it will achieve outcomes. Philip (1990) stressed a common problem that can reduce the effectiveness of appraisals result from poor management preparation. With this in mind, I provide documentation to leads/managers where we work through some scenarios (***Evidence 20***). This provides managers with common questions gathered from Achieve feedback, to help them prepare for forthcoming meetings. I work through these with managers to ensure they are confident in addressing areas of concern for employees.

One to one advice to managers how to manage a poor performing colleague and to give them support in delivering difficult performance reviews is also important. Jacobs et al (2011) identified in research that managers need an integrated set of knowledge, skills, and attitudes to have productive difficult conversations. These 'challenging meetings' can place a strain on the employee/manager relationship and need addressing. Again, one to one support is offered to managers, with typically coaching undertaken using ***Evidence 21*** as a tool.

More specific examples of support managers has come in the forms of a manager wanting to review their succession planning. So I worked with that manager to look at apprenticeships to fill current gaps identified by a performance review. ***Evidence 22*** highlights the meeting that took place with a manager to look at apprenticeship schemes for their department. ***Evidence 23*** shows successful

implementation of training and one to one support for a manager carrying out effective performance reviews.

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Jacobs, S. C., Huprich, S. K., Grus, C. L., Cage, E. A., Elman, N. S., Forrest, L., & Kaslow, N. J. (2011). 'Trainees with professional competence problems: Preparing trainers for difficult but necessary conversations'. *Training and Education in Professional Psychology*, Vol. 5, pp. 175–184.

Joo, B.-K., Sushko, J.S. and McLean, G.N. (2012). 'Multiple faces of coaching: manager-as-coach, executive coaching, and formal mentoring', *Organization Development Journal*, Vol. 30, JoNo. 1, pp. 19-38.

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Kuvaas, B., Dysvik, A., & Buch, R. (2014). 'Antecedents and employee outcomes of line managers' perceptions of enabling HR practices'. *Journal of Management Studies*, Vol. 51, pp. 845–868.

Philip, T. (1990). *Appraising performance for results*. 2nd Ed. London: Macgraw Hill.

Rees G. & French R. (eds.). (2016). *Leading, managing and developing people*. Chartered Institute of Personnel and Development.

Taylor, S., & Woodhams, C. (2016) *Human Resource Management: People and Organisations*. London: CIPD.

Personal Development Plan: Vikki Evans

What are my development objectives?	Priority	What activities do I need to undertake to achieve my objectives?	What support/resources do I need to achieve my objectives	What is my timeframe
SOP training.	Medium	Understand the current SOP manual for organisations and the staff training needs in the PDP folder.	Line manager assistants, HR manager, Colleagues	Immediate and then on-going
On-going mentoring support	High	Introduce mentors into the organisation to support leads.	Line managers, need an internal list of mentors.	Immediate but rolled out in 6 months.
Learn more about the how to run an Achieve session.	High	Attend workshops and training sessions with HR/Business team to understand the PM/achieve process, policies and toolkits rolled out in the business to date.	Line Manager, toolkit information, handbook, HR Manager, colleagues	3-6 months, but attend ongoing support offered via the HR Manager to ensure continual development

EV13

2. Your Name (First & Last) / Eich enw (Cyntaf a chyfenw)	7. When are you available for Mentoring sessions	8. Which geographical location is most suitable for you (tick all that apply) / Pa leoliad daearyddol sydd fwyaf addas i chi? (ticiwch bob un sy'n berthnasol)	12. Which Industry Sector do you work in / have you worked in? 13. What roles have you held? (e.g. job title, level/grade) What did each role entail? 14. What skills, knowledge or areas of expertise do you have?
			Advanced Materials & Manufacturing. Marketing Communications Manager, Product Manager, Marketing Manager. Almost 20 years experience in Marketing and approx. 6 years line management experience, including appraisals and performance management. New to coaching/mentoring
			Communications / Public Affairs / Third Sector. Administrative Assistant at a UK-wide charity (Oxfam) Family Support Worker for Social Services Public Affairs Assistant at a Welsh charity (Age Cymru) Policy officer at a Welsh charity (Age Cymru) Project officer running a Big Lottery funded project to engage third sector organisations in devolution and decision making (WCVA) Public Affairs Manager at WCVA, also member of the WCVA Management Board in this role with line management responsibility for a small team Policy and Public Affairs Manager at The Open University in Wales, member of Senior Management Team, line manager.Welsh politics and public affairs, social policy / devolution, communications skills (strategic and operations), policy and influencing skills, administration, strategy and planning, line management and leadership. Knowledge of the HE sector and the third sector. Experience of developing and delivering public affairs and communications campaigns. I have a BA in English Literature and Cultural Criticism and an MSc(Econ) in Welsh Government and Politics. New to coaching/mentoring
			Education, Human Health & Social Work, Art & Design, Recycling. Support worker, Tutor, Teacher (STF Facilities),Team Leader, Art Co-Ordinator, Lead Artist, Artist-Animateur & Freelance Artist. I am a multi -skilled creative who has worked for 30 years with excluded people (homeless, educationally excluded, ethnic minorities, . I have worked as a team leader in voluntary sector as well as running my own business (artist/musician).I have mentored students /volunteers with disabilities, voluntary sector volunteers and coached new staff. Have experience /qualification in coaching/mentoring.
			Admin & Support Services, Hospitality and Human Resources and Training. Receptionist, Reception Manager, Front Office Manager, Revenue Manager (all in hotels) Training Manager (working in Domiciliary Care) Human Resources and Training Manager (In both Care and in Hotels). 30 years experience of working in hotels, within the Front Office Department, the majority of that in London. Customer Service, complaint handling, budgeting. Human Resources Management, interview skills, team development, etc. Qualified trainer with both PTLLS and CTLLS and Trained Assessor. Human Resources Management Level 5. ILM Leadership and Management L4, working towards L5.. New to coaching/mentoring
			Construction, Education, Food & Farming, Landscaping, membership and trade associations. Manager, Head of Department, Director and CEO. training and development, finance, budgets, new income generation. Experience coaching trainers, and staff. Have experience /qualification in coaching/mentoring.
			Food & Manufacturing, FMCG. Senior Category Manager Category Manager Customer Marketing Manager Marketing Co-ordinator. Food industry working with retailers such as Sainsbury's, Morrisons, Aldi and Co-op. Strategy building to deliver growth for customers Completed my Masters in Management and Marketing. Welsh Speaker. New to coaching/mentoring
			People Manager / Senior Manager in Retail, HR, coaching, performance management, recruitment, change management, L&D, Grievance, Mediation & Conflict management, leadership, psychological assessment, wellbeing at work,Part of my role as senior manger was to mentor trainee managers for development, coaching line managers.

EM2 EV14

EV15

Chwarae Teg
Agile Nation2

Performance Management: Appraisals and Feedback

Managers' induction Workbook

Chwarae Teg | AGILE NATION2

Cronfa Gymdeithasol Ewrop
European Social Fund

Business Programme

Date	Time	Workshop	Location	Lead Facilitator
29/11/2018	1000-1230	Performance Managament Appraisals and Feedback	Llanelli Office	Rhodri Packman

Delegate name	Company	Email	Signed In
Lisa Mork	BLUE WATER RECRUITMENT	LISA @ BLUEWATERWALES.COM	LMork
Robert Evans	Blue Water	Robert@bluewaterwales.com	
Mike Ham	WBV Ltd.	mikeham e wbv.ltd.uk.	
Fran Farrell	WBV Ltd	franfe wbv.ltd.uk	
Lucy Welch	WBV Ltd	lucyw@ wbv.ltd.UK	
Lizzie Jones	CT		
Amber Jenkins	CT		

The information provided on this signing in sheet is used to maintain client records of all activities undertaken on the Business Programme.

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EV16

EU17

e.g. "Understand the purchase process."

Looking carefully at the above objective and you'll notice some problems in the phrasing of the objective. The problems that come to mind are:

S: How will the manager know what to do? The verb understand is not really specific!

M: How will the manager measure the progress towards achieving this objective? The objective does not have any measurable item.

A: Is it an achievable objective? If it isn't, then de-motivation creeps in.

R: Is it a realistic objective? For example, if the manager does not have the skills or resources, the objective may not be achievable. In the example above, as there is no timeline associated, the objective is vague. Also, the manager may not have the supported resources.

T: By when should the objective be met? Time-line is critical. Humans work towards goals based on some pressure applied by the time of completion. Hence, objectives should be time-bound.

The objective mentioned above can be rephrased to:

"Decrease the number of steps required to complete an order by 30% by the end of this quarter."

Examples of objectives at Chwarae Teg:

Discussion points:

1. What is your organisation's aim?
2. What are your organisation's objectives?
3. What are your organisation's values?
4. How does this translate into employee objectives?
5. How is this benchmarked/monitored/improved/evolved?
6. Should objectives be 'SMART'.

EU18

Types of Feedback

1. Positive Feedback

This applies where the person has performed well. You use it to highlight how the job was done well, how it linked to expected outcomes or behaviours. Use it to *positively reinforce good performance.

Your focus: Lead the process by asking a range of open ended questions.

Your purpose: to encourage the staff member to talk about their good work and for you to reinforce it, in order to keep the good performance going into the future.

The process:

i. State and describe in specific terms what the staff member did well. Describe the actual behaviour and actions.
ii. Indicate the positive impact of their behaviour/actions.
iii. Ask the staff member for their input e.g.
iv. What do you believe contributed to the excellent performance? Or what do you believe you did particularly well?
v. What did you learn that could be applied to other work or projects in future?
vi. How can you share your experience/ learning with others in the team?
vii. Explore and reinforce their suggestions. Set some goals and describe the positive consequences that will result from them following through on the goals.

2. Developmental Feedback

This applies where a person has not performed / behaved in line with expectations. You use it to highlight where and why performance was not up to expectations and explore how they might do it better next time. Use it as a positive way of improving future performance. Nobody is perfect and everyone's makes mistakes.

Your focus: to describe, be clear, and be specific (not judge, blame or accuse). Lead the process as a positive, coaching experience where you show interest in rectifying the performance issue (s) to the benefit of the individual as well as the broader team/organisation.

Your purpose: to raise the person's awareness and understanding of the issue in a way that they will take responsibility for improving. You want to enable them to commit to a change in behaviour or outlook and commit to taking action to improve their performance.

The process:

i. State and describe the concern in specific and objective terms. Focus on actual behaviours / actions, not the person.
ii. Ask for the staff member's view. Give them the chance to share with you their thinking on why the problem exists.
iii. Use "I think" openers, rather than "You are" statements.
iv. Indicate the negative impact created as a result of their behaviour/actions on them, the team, and the organisation.
v. Problem solve ways to improve the performance to meet those expectations. Ask for, and listen, to their ideas.
vi. Coach them to help them achieve the goals.
vii. Review the achievement of goals and acknowledge improvements

EU19

Self-Reflection and Preparation

These are useful questions to ask yourself in thinking about how you might be performing in the area of giving and receiving feedback. Reflect on the questions to which you answer "No" and identify areas you may need to work on:

	Regularly	Sometimes	Rarely
1) Do you tell people when they are doing a good job?	☐	☒	☐
2) Do you give credit to people for their ideas?	☒	☐	☐
3) Do you praise achievement and behaviours?	☐	☒	☐
4) Do you positively acknowledge creativity and ideas?	☐	☒	☐
5) Do you compliment people on their strengths?	☐	☐	☒
6) Do you explain clearly and non-judgementally where a person's performance is going off course? Do you do this in a timely manner?	☐	☒	☐
7) Do you coach people to facilitate them in finding creative solutions to their work problems?	☐	☒	☐
8) Do you encourage your staff to give you feedback, so you can continually learn and grow as a manager?	☐	☒	☐
9) Do you actively listen and consider if there is some merit in the feedback you are receiving from staff? Or do you react defensively?	☒	☐	☐
10) Do you listen to reply or to understand?	☐	☒	☐
11) Do you acknowledge what other people are trying to say to you with paraphrasing or summarising?	☒	☐	☐

EV20

SCENARIOS

'People will take advantage and slack off.'

'How can you ever reach anybody if they're not in the office?'

'But what if you really, really, really need to reach somebody?'

'A manager needs to be there for people.'

'What if I get stuck with more work than anybody else?'

'We're already doing this; this isn't anything new.'

'If everyone becomes more efficient are there going to be lay-offs?'

'How can you advance your career if no-one sees you working?'

'Isn't it unprofessional to answer a customer's question while you are shopping?'

'What if somebody is out of the office for a whole month? Isn't it just common courtesy to let people know where you are?'

This will work for some people but not everyone. Some people simply need more supervision.'

EU21

H6

Chwarae Teg
Agile Nation2

Seven Steps for Undertaking a Difficult Conversation

1. Make an appointment with the worker or colleague stating that you have some feedback you would like to provide.

Role model the behaviours you expect from the worker or colleague. Agree on a suitable time and find a private place to speak with the worker or colleague.

2. Sometimes, particularly as a manager, a difficult conversation is taking place because other workers have complained about the behaviour. Avoid amplifying the feedback or excusing your responsibility by stating that a number of others have complained. This may only heighten the embarrassment to the worker or colleague and inhibit their recovery.

3. Do not go straight into the feedback. Tell them you must provide them feedback that is difficult to share—set the scene. If you are feeling uncomfortable with your role, you might say that. Most people are as uncomfortable providing feedback about an individual's behaviour, as is the person receiving the feedback. This is a natural response.

4. The best feedback is straightforward and simple. Be specific and factual about the behaviour and provide examples, remain calm and avoid an accusatory approach, for example—"I am talking with you because [the behaviour] is an issue that we need to address...".

5. Look to the future. Emphasis the impact that changing their behaviour will have from a positive perspective. However, explain that doing nothing about the behaviour may have consequences for the worker.

6. Reach agreement on what the colleague will do to change their behaviour. Set a due date, even tomorrow if needed.

As a manager, set a period for review. Record the exchanged agreement. Some parties like to sign an agreement; however, a record of events exchanged via email is usually sufficient. In other cases a record of events, a diary entry for example, is advisable.

7. Follow-up. Acknowledge the use of positive behaviour. Should old behaviours return, further clarification may be necessary. While considering that additional feedback may be necessary it may also be appropriate to consider that more formal action is the required next step.

EV22

Trans. in Appraisals →

Wages are all never - need pay rises - but can be linked to performance.

Need to bring in a manager (production) to manage individuals workers etc.

" Pay for private maths lessons for apprenticeships "

Apprentice succession Planning ?

Apprentice - meeting with college to assess performance

↳ can feed into P.M.

---

3 weeks until Pay rise - we can run PM after this.

1. Comms
2. setting the scene.
3. Appraisals

} link. time m.

Positive Progress Review

Positive progression review

PPR

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EV23

FW: performance management

1 message

Workshops <workshops@chwaraeteg.com>
To: Rhodri Packman <Rhodri.Packman@chwaraeteg.com>

Hi Rhodri,

Thanks for the information on performance management. Following up from the workshop you delivered and the support you provided 2 weeks ago we have implemented the following:

As part of the appraisal system, we now use 360 degree feedback, where staff observe each other during different activities, here they observe good practice and how to give good feedl

Through leadership training we have been trained in conducting appraisals every 6 months which results in ongoing training / in house training in whichever areas need developing.

Managers also carry out personal development to keep on top of trends in running appraisals and giving feedback. This information is stored in the PDP as you suggested.

Thanks

Charlette

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LO3 – Personal statement

Be able to assess the impact of performance management activities on organisational performance and make recommendations for enhancement.

At Chwarae teg, as part of a regular feedback process where all employees are asked their opinions, a benchmarking survey was undertaken. This survey benchmarked the organisation against other 3rd sector organisations and reviewed attitudes of all staff in a number of HR areas, one of which was performance management. (***Evidence 24).*** Running such a survey and eliciting feedback from all staff is a way of demonstrating a culture of commitment to staff, of listening and responding to views of employees. This in turn, as authors such as Holbech (2005) describe, leads to the development of a sustainable psychological contract which is a way to create a high performance culture.

The survey results were shared with managers at a SMT (senior management team) meeting to help review and assess the impact of the Achieve process. This prompted work on the Achieve process which were to be raised in the meeting (***Evidence* 25**). Firstly, how to ensure fairness in the process. Comments had been received from staff that highlight a need to ensure that some employees did not feel 'picked on' in terms of their performance being measured, when compared with less target driven roles within the organisation. Specifically issues were addressed on how to ensure those teams that have measurable outcomes in terms of finance and client targets do not feel they bear the brunt of performance. Outcomes from this was a re-assertion that working towards values need to be captured, as well as continuing to reward teams and specific employees for great performance and share this with the entire organisation. This is now done more regularly as part of a weekly communication to all staff (***Evidence 26***) Rees and French (2016) see this as a part of building intrinsic motivation.

Secondly, Chwarae Teg strives to be a high performance organisation and while Achieve is not a performance management tool, it helps to facilitate regular conversations between leads/ managers and employees about expectations, objectives and performance. Managers need to be training continually to ensure high performance is achieved.

Discussions are regularly held with managers based on employee feedback and their own reflections, on the back of such a team meeting, a specific training session was held as a result ***Evidence 27***. The training session covered the evaluation of how effective Achieve has been and evaluating managers/ abilities to deliver and looking at ways to improve the process, in line with Chwarae Teg's aims to be a high performing organisation.

Mangers were ask to consider their own and employees expectations arising from an Achieve meeting, this is a process supported by HR, who try to look at the Achieve process from the point of view of an employee (indeed, all HR staff are appraised using the system), a process Buchner (2007) sees as a core part of HR's role in performance management. Managers are also reminded that performance management and development processes focused on engagement should always be a two-way conversation (Latham et al, 2005).

A further discussion point was how to set objectives and what constituted good and poor performance in line with Chwarae Teg's core values. To this end objectives were reviewed on a team level to ensure they are accurately leading to meeting overall organisational objectives. (***Evidence 28***)

The session also assessed the extent to which performance management processes supports High Performance Working in Chwarae Teg and contributes to sustained organisational performance.

(***Evidence 29***) It goes without saying that Achieve does not replace the manager-employee relationship/ psychological contract, but by continually seeking to empower all staff to make full use of their talents to make work more meaningful. This is an on-going process.

References

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Latham, G.P., Almost, J., Mann, S. and Moore, C. (2005), 'New developments in performance management'. *Organizational Dynamics*. Vol. 34, pp. 77-87.

Rees, G. & French, R. (eds.) (2016.) Leading, managing and developing people, 5th Chartered Institute of Personnel and Development.

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FPE outcomes vs third sector average

EV24



EV25

Minutes of Agile Nation 2 Leads Meeting

Present: Emma Richards, Judy D' Abertson, Amy Kordiak, Natalie Griffiths, Tania Watts, Lorna Virgo, Chris Hill, Trish Chalk, Jacqui Baker, Hazel Brophy, Jo Bishop, Natasha Davies,
Joined meeting at point Hayley Dunne, Joy Kent

	Action Required	Deadline
1. Welcome		
2. Notes & Actions Arising from the last meeting Copy write – Employers Programme, Catherine Gate has prepared a briefing to be sent to TC for approval Complaints Procedure - **Complete** Purchase order system - **Complete** Europe Day – Complete Women's Strand Final Outcomes *(See structure chart)* - PDP's admin duties to be revisited. - Mentoring partner to take on new responsibilities training allowance and pick and mix. - Senior PDPs line management with 50/50 team split, this will be internal post only. Marsha is posting these roles. QPI - No more pre claim checks - Changes will be made to the report from the feedback given. LB Project Plan - **Complete**	CG	20/06/2019 ASAP
Achieve - The feedback from staff is that Achieve is not fully understood and currently not very effective management tool. Capacity issues: There is no way for the leads to monitor patterns. - LV - a staff questionnaire will be issued to gain further feedback - All the job descriptions to have and over haul and include much more detail to enable Leads to measure success against, manage performance and KPI's - Written feedback is not always uploaded to SharePoint, and Leads would like to remove the sheets from Sharepoint - The review to cover the inconsistencies in application, how performance is measured, how additional hours and work is recorded	TC LV	30/06/2019 30/06/2019



Fri 12/04/2019 15:28

Helen Antoniazzi

weekly update

All-Staff

Hi all

Business Team update

Gemma.littlejohns@chwaraeteg.com

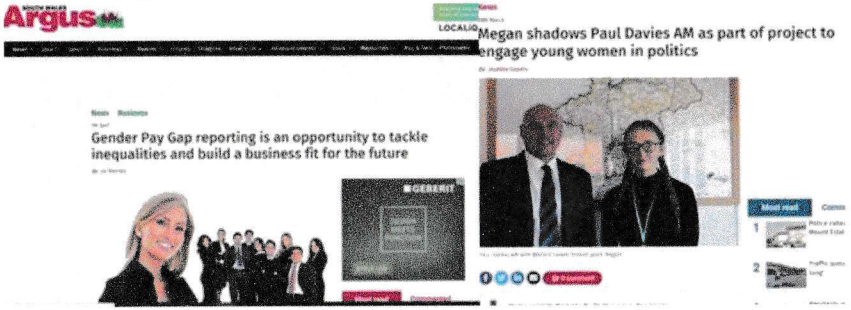
This week we celebrate a small but significant act of inclusion to support the trans community. In January our team attended a Transgender Awareness training session and as a result we have taken action to not only help (cis) women but to consider the unique needs of trans women too.

A law firm working with Bob Hicks has taken on board his advice and they have changed all the signage on their toilets so they no longer have *designated* male and female toilets. They just have toilets which can be used by anyone. The reason for the change has also been communicated to their staff.

We have also made changes to our equality and inclusion workshop so that we raise awareness of what dead naming and mis-gendering is; along with a few other examples of what workplaces need to do to be more inclusive of trans employees. This session has been delivered to around 30 people since the changes so 30 more people slightly more informed on the topic.

We are proud of the changes we are making to Welsh workplaces and would welcome any other suggestions or feedback from colleagues as to what else they would like to see improve for women from different backgrounds in Wales.

Chwarae Teg in the news



https://www.southwalesargus.co.uk/news/business/17556941.gender-pay-gap-reporting-is-an-opportunity-to-tackle-inequalities-and-build-a-business-fit-for-the-future/

EV 29

Objectives	Cardiff Approx. delegates 40
1. Understand the **rationale and thinking** behind Achieve 2. Equip you with the **knowledge, skills and confidence** to work in Achieve 3. Have a **shared commitment** to how we will take Achieve forward in CT.	

Resource: laptop, charger, slides, flip chart, pens, projector.

Start time: 10am **Lunch time: 12.15** **Close time: 4pm ish**

Tuesday 30 April 2019

Times	Activity	Time	Purpose
10.00am	**Performance management** • What is performance management • Why is it important • Historical / theoretical context **Maria**	15 minutes	Understand the **rationale and thinking** behind Achieve
10.15am	**Achieve – A framework for success** • What Achieve aims to Achieve • What Achieve is not • Practical application • What skills will be needed • The role of a Leader in Achieve • Practical application **Revisit questions** **Lorna, Rhodri and Maria**	45 minutes	Understand the **rationale and thinking** behind Achieve

EV 26 27

11am	**Skills** **Common questions with Achieve** Eliminating the noise (see what if section in the ROWE book)	1 hour	5 mins to set scene Numbering delegates 1-8 (wed night) Discussion 8 tables 2 questions per able – 16 questions 20 mins feedback discuss on table 30 feedback
12pm	**Skills** Juggling exercise	30 mins	Equip you with the **knowledge, skills and confidence** to work in Achieve
12.30pm	**Lunch**	30 mins	
1pm	**Skills** 18 tasks exercise LORNA	45 mins	Time keeping and priotising 1 task. Preparing is important. Individually. Saying no. Not all things to all people. Set the scene 5 mins think yourself 15 to put up on flip chart as table 15 mins to share Equip you with the **knowledge, skills and confidence** to work in Achieve.
1.45pm	**Skills** Bolton and Bolton Lorna and Rhodri	1 hour	Equip you with the **knowledge, skills and confidence** to deliver
3pm	**Team discussion re Achieve** **How do we ensure fairness across teams?**	30 mins	

EV28

This analysis report will look at the current project targets, the achievements made to June 2019 and predictions for meeting end of programme targets by June 2020 for EW & WWV on the Business & Women's strand Programmes. As enrolment for both programmes ceases in December 2019, the relevant quarterly figures required are based on there being only two quarters left to reach certain targets. In addition to this, the report will provide analysis on the disaggregated data that is collected and identify any patterns and trends.

The report goes into detail about every outcome and where we are currently with each one, but as a short synopsis, the report predicts the following based on the figures at Y5Q1 and relates to achieving 100% of target.

Business Strand outcomes already met

- EW – Enterprises working differently
- WWV – Enterprises achieving Exemplar Employer
- WWV - Enterprises working differently

Business Strand outcomes predicted to be met

- EW – Enterprises integrating sustainable development
- EW – Enterprises achieving Exemplar Employer
- WWV – Enterprises integrating sustainable development

Business Strand outcomes currently predicted not to hit target

- EW - Number of micro, small and medium sized enterprises supported
- EW – Enterprises having adopted or improved E & D strategies
- WWV - Enterprises having adopted or improved E & D strategies
- WWV – Number of micro, small and medium sized enterprises supported

EU29

High Performing Teams

Desired outcomes:

A high performance culture within Chwarae Teg - striving for continuous improvement as individuals, teams and as a company. Line managers take appropriate action (e.g. training, development, support, coaching, performance management) when performance is not of the required standard; Commercial mindset- managers and employees adopt a commercial mind-set based on continuous improvement and adding value

Activity
Training centred on high performance, impact, personal brand, resilience etc.
Managers taking a consistent approach to performance management
Appropriate management of underperformance

Chwarae Teg