

Qualification: CIPD Diploma in Applied Human Resources

Module Name:

Contributing to the Improvement of Individual and Organisational Performance

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Personal Statements – **2484**

Collected Evidence – **2828 plus screenshots**

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CIPD Membership Number: 5665008X

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:

A handwritten signature in black ink, appearing to read 'Duncan Hook', is written over a light grey rectangular background.

Date: 19/09/2021

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<u>DUNCAN HOOK</u> <u>EVIDENCE MATRIX</u>				CIPD Membership No: 5665008X		
Qualification: CIPD Level 5 Diploma in Applied Human Resources				Unique Learner No. (ULN): 1920325		
Unit code	Unit Title	Assessment Criteria no.	Evidence description	Evidence reference number	Assessor initials	I/V initials if sampled
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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:

19/09/2021

LO1: Be able to provide information on performance management activities within PCC

In mid-2019, Pembrokeshire County Council (PCC) outlined a series of changes to corporate culture from which the aim was to improve the experience of employees and managers with the results ultimately benefitting the people of the Pembrokeshire community (EV1). These collectively were to form a 'Golden Thread' of policies and procedures, which would work in conjunction with each other for a common goal. The new 'Performance Management Framework - July 2019' (EV1) was formulated as part of this, with the dual aim of ensuring efficiency and high performance while also directly addressing concerns around the psychological wellbeing of our staff which has been highlighted as an issue when work takes precedent over employee health (Burt, 2017).

This plan is in line with two sources of legislation. The first is the 'Local Government (Wales) Measure 2009' (EV2), which expects constant refinement of services and standards. This they hold accountable as a duty to the public (EV2) with the expectation to measure performance and ensure that it improves over time. The second influence comes from the 'Wellbeing of Future Generations (Wales) Act 2015' (EV4) which provides a framework for public organisations to set targets for improvements in wellbeing amongst staff and act to meet these targets. This is an aim to create "a healthier Wales", creating common practices that will shape Welsh culture in the future.

The policy 'Performance Management Framework - July 2019' outlines the programme by explaining how Performance Management fits within the corporate plan (EV1). There is a four part cycle of identifying objectives to improve wellbeing, creating a plan to meet these objectives, monitoring performance and then reviewing and devising further objectives. This mirrors Armstrong's model of a performance management cycle (2009, p. 62). The organisational plan aligns to an annual structure of reviewing at the end of the financial year to set objectives for the year ahead (EV1). The actual implementation of Performance Management with individual staff is much more of a continuous process using a smaller cycle allowing managers to continuously connect and work with employees to set objectives for their teams and encourage self-evaluation while aligning them with the larger corporate plan. Also relevant in this is delivery of the plan is the 'Your Behaviour Standard' (EV5) document, which provided a set of behaviours that managers and employees were encouraged to exhibit to ensure these plans came to life. These are similar to the buy in required with the "Big Idea" concepts uncovered by the 'Black Box Studies' (Purcell, et al., 2003, pp. 37-38) where belief and adherence to behaviours lead to better organisational results.

The actual introduction of the new plan did not launch until May 2021, a year later than planned due to the disruption from the Covid-19 pandemic (EV9). In recognition of the fact that many teams are still remote working away from the office, this was a soft launch with the new framework not due to become mandatory until the following April. The rollout began with a mandatory training session delivered by Learning and Development in online sessions (EV13), accompanied by an e-learning module that is mandatory for all employees to complete (EV7, EV8). This module on PCC's Pod takes the learner through the new online 'Performance & Wellbeing Plan', a portal which allows employees to document their long term goals, set objectives with their manager and keep a record of their development over time (EV12). The benefit of this structure is that it supports teams working locally and remotely so will be adaptable for the whole organisation (Schrage, et al., 2019). Further customisation of the plan comes in the expectations for contact between managers and employees in corporate and vocational roles. In corporate roles such as in Finance, where goals and team focus are constantly shifting, it is expected for managers to meet their teams every month (Wigert & Barrett, 2020); while vocational roles, such as building maintenance, are more consistent so goals tend to be relevant over a longer period and therefore they will meet every 6 months (EV13). This also adjusts depending on the NJC grade of the employee where grades of 6 and under

will meet in groups while 7 and above will meet on an individual basis (EV13). Despite the changes in contact time, it is still expected for staff to continue their own development using the online portal (EV8).

Although they are part of the wider HR department, development and delivery of the 'Performance & Wellbeing Plan' has been handled solely by the Learning and Development team (EV6, EV9). This has been identified as an area for improvement and so there is an opportunity to involve other areas of HR in communicating this plan to managers and seeing the benefit of such plans in the wider HRM strategy (EEF & CIPD, 2003). I have identified the benefit to Employee Relations in my team's own work to reduce sickness absence which since the pandemic began has been largely impacted by poor psychological wellbeing (Taylor, 2016, pp. 198-199). The lack of connection between staff and poor communication either over video call or in some cases exclusively over email has led to bad working practices and employee burnout. I have started to evangelise the 'Performance & Wellbeing Plan' to fellow Employee Relations colleagues and my own managers to help ensure that managers are comfortable with the process, are aligned with the training and are engaging with their teams (EV16, EV17, EV18).

LO2: Be able to support line managers to deliver performance management activities within PCC

Before offering any support to managers on their delivery of the new 'Performance & Wellbeing Plan', I wished to understand how they were currently engaging with the programme (EV14, EV15). I met with a Learning and Development Coordinator to get an overview of the project (EV9) and asked specifically for service areas that I already work with who had opportunities for improvement with their use of the framework. I then met with managers from Building Maintenance, Facilities and Finance and had an informal conversation with each about their perspectives on performance management (EV22, EV23, EV24).

All three managers that I spoke with had either recently completed the training or were about to attend a session. This was helpful in hearing their fresh take on the programme, which I could compare after they had started to engage with it at a later date. It was clear from my conversations that all areas had grown used to an informal performance management process over the last two years but that they also saw that this had been detrimental in their relationship with staff and in turn this had an impact on performance and wellbeing (EV26) (Suff, 2021). Both Facilities and Building Maintenance are classed as vocational departments and typically were made up of lower NJC grade roles meaning that developmental conversations would take place in a group setting every 6 months (EV22, EV23). While they saw this as supportive for the service to ensure it did not affect their busy schedule, they felt that every 6 months seemed a long wait for some staff to discuss their development so were likely to deviate from the plan when it suited (EV26). To support ongoing development of 'high potential' staff we discussed the need for performance management to not only focus on work achievements but also on promoting existing skills or competencies (CIPD, 2017) that would help them grow (EV22).

The Finance manager had opposing concerns as he felt he would struggle to keep up with monthly performance meetings with his team as it is largely made up of higher-grade accountant roles and is a corporate function (EV24). This was not just because of the regularity of actual meetings but also

because he felt he needed to write a full report in the online portal each time. As part of our discussion I talked through the CIPD (Gifford, 2020) vision of performance management and the benefit of regular, ongoing development in place of lengthy annual reviews (Wigert & Barrett, 2020). We looked at his current method of developmental conversations which were quite directive and thorough which it was clear was not sustainable on a monthly basis and not as beneficial to the individual (Reilly, 2016). Instead we discussed an employee-led, self-motivated approach in which he was there to support and guide rather than direct the individual (EV39); this being more achievable for the manager and ultimately more beneficial for the employee (Landsberg, 1996, p. 8).

In my capacity as Employee Relations Adviser, I have seen the benefits of regular manager contact in Social Services, where 'supervision' meetings are expected on a monthly basis. These meetings cover areas of concern and development for the individual and fulfil the same function for social workers as the new 'Performance & Wellbeing Plan'. This year I have supported two performance related issues from an Employee Relations perspective.

The first is a performance and capability case for a senior social worker who had not been completing administration tasks; leaving himself and the service vulnerable (EV27). The approach to this was kept informal for the first few months (Taylor & Wilkinson, 2016, p. 42), giving plenty of opportunity for clarity on what the concerns were to the employee and why they had an impact on the service (EV29). Adjustments were made to his working practice and additional support was offered after an Occupational Health referral made recommendations to support his dyslexia. I maintained regular contact with the manager to ensure that supervisions were directly tackling the issues of concern and to keep up with how the individual in question was meeting the objectives set for them (EV30). This process ended in a disciplinary hearing where this record of supervisions formed a report to track the support offered, objectives set but not met and the resulting capability concerns (Acas, 2021).

The second case I supported were two extended probation periods. The two individuals had commenced employment during the winter 2020 lockdown and were at a potential disadvantage; however, the manager had wider concerns regarding their performance and attendance (EV31, EV32). I worked with her to ensure clear expectations were set with each employee at a formal meeting (EV33, EV34), with areas to improve upon before the end of the extended probation. Again, the regular supervisions ensured that the manager could monitor the performance of these individuals, offering feedback and support where required (Wigert & Barrett, 2020).

In both of these cases, regular performance management allowed managers to give their employee ample opportunity to improve while also ensuring there was a record of the expectations set with the individual (EV36). Both managers involved saw the benefit of this in a social work setting but I also could see the benefit of this applying to areas outside of social services to ensure a fair process (EV37). My hope is that the new 'Performance & Wellbeing Plan' structure of regular developmental conversations will offer the same benefits to the Employee Relations work that I am supporting.

LO3: Be able to assess the impact of performance management activities on organisational performance and make recommendations for enhancement.

Although individual performance management will be on a much shorter cycle, according to the PCC's 'Performance Management Framework - July 2019' (EV1) the outcome of this work will be reviewed on an annual basis at the end of the financial year in line with the 'Local Government Wales Measure 2009' (EV2). Therefore, it is difficult to monitor the impact that this new plan is having on the organisation due to the lack of comparative data and its relatively recent introduction. At this early stage, I have relied upon the testimonials from managers who have started to use the new structure (EV39, EV40). They have largely felt that the cadence of these meetings will help ensure they maintain regular contact with their teams and feel that there will be a definite impact on mental wellbeing (Winfield, et al., 2020), and reducing sickness absence as a result (EV39) which in turn will support performance (Palmer, 2020). This structure also complements the coaching management style, which has also been gradually introduced this year with managers taking a guiding role (Haden, 2020); listening to the employee and asking questions that will help them develop independence and initiative (EV39). Many service areas have been working with very informal and inconsistent performance management over the past year and a half (EV25), although the structure has been in place in social services for many years in the form of developmental 'supervision' meetings (EV32).

I made recommendations to emulate the Social Services 'supervision' style of monthly development conversation in more areas of the organisation (EV37) as I had seen the benefit of this regular contact. This has ensured individuals are aware of their objectives and are receiving feedback to improve; in addition to the added wellbeing check-in this provides which has been lacking in the last year as people worked from home (Brown, 2021). Coincidentally this is the exact structure of PCC's new corporate performance management plan (EV13). I feel with my experience of seeing the benefit that regular performance conversations had on the performance and capability cases that I supported this year, I am in a good position to evangelise the benefits of regular contact, review and guidance for staff in maintaining standards (EV37). This has been very beneficial in social services and so if this can be successfully brought to other areas of the organisation I believe that this will support high performance in the organisation.

The 'Golden Thread' of ideas, policies and practices introduced in 2019 form a package of changes which seek to improve the organisation's culture and the experience of employees (EV1). In many ways, this emulates the structure of a high performance suite of practices (Campbell & Giles, 2010). At PCC, HR practices form part of these changes but they are not instrumental in promoting high performance (EV6). HR are in a unique position in that we maintain regular contact with managers in every area of the business, and so one of my key recommendations is that HR take a much more active role in promoting effective performance management (EV44). Part of this will be in offering support and guidance (Rees & Tymon, 2016, pp. 255-256), but also in monitoring how engaged they are with the programme as this will impact the effectiveness of performance management on their teams (Zhang, et al., 2018). The link to high performance outcomes are in the aims to improve attendance by reducing sickness absence caused by burnout or poor mental health; and the introduction of a consistent feedback culture (Taylor, 2016, p. 210) ensuring employees are kept on track with goals that align with the organisation's objectives (Gifford, 2020).

Although participation in the manager training session has been high (EV43), this is not translating into team engagement with creating an online performance management plan (EV45). From speaking with managers, it seems that this is in part due to the large scale of the organisation, involving many varied service areas, which are difficult to unite under one plan. Some are isolated

and do not necessarily feel part of a larger organisation (EV6). The current performance management process does help with this issue by giving some level of customisation on number of sessions or structure of sessions, although I have fed back to Learning and Development that this could go further as some managers would like the opportunity to adapt the plan to suit their particular team (EV42). I also recommended adjusting the blanket approach to group performance sessions for roles Grade 6 and below as I feel this will not support some staff in certain areas who are working on individual projects or have certain supervision duties. It also appears that some managers do not feel equipped to hold these sessions regularly with their teams (EV39, EV40) and so additional training on coaching conversations and delivery of effective feedback (Porter, 2017) would be beneficial for them to manage their workload while continuing to offer support.

1. Introduction

- 1.1. This document explains our approach to performance management. It describes the systems, structures and supporting arrangements we have established in order to identify and respond to performance issues and drive continuous improvement.
- 1.2. Our performance framework applies to all services directly managed by the Council. However, it can also be applied to those services we deliver in partnership with other organisations: statutory partner organisations and regional delivery bodies.
- 1.3. Effective performance management will help us achieve the following objectives:

Help improve services and outcomes for people	Goals are prioritised and resources are allocated effectively
Empower managers and staff	Staff are motivated, aware of their own targets and goals and understand their contribution to achieving the Council's key outcomes
Ensure the Council and its partners achieve what we have set out to do	Provide early warning of, and an opportunity to rectify poor performance
Drive future improvement	The framework provides an evidence base for improved decision making and the efficient use of resources

- 1.4. While it is important that this framework remains flexible, its basic elements will not change. This framework describes those elements in greater detail. It covers:
 - the culture that underpins our approach to performance management,
 - how our approach to corporate planning drives improvement,
 - the role that indicators and targets play within our performance management system,
 - how we monitor actions, and
 - the infrastructure and resources we use to acquire, collate and analyse performance information.
- 1.5. Since 2010 we have responded to the duty to secure continuous improvement as set out in the Local Government Measure 2009. The Wales Audit Office assesses our performance and compliance with this duty as part of their Annual Report. Following enactment of the Wellbeing of Future Generations Act 2015, the council is also required to demonstrate how its priorities contribute to local Wellbeing Plan Objectives and National Wellbeing Goals.

2. Culture

- 2.1. Much of this document focuses on the systems we have developed to help us manage performance. No less important than these systems in driving improvement, however, is the culture that underpins the organisation.
- 2.2. As an organisation we have a clear sense of purpose. Our vision statement is: *Working together, improving lives.*
- 2.3. Work towards our vision is underpinned by the mission statement below:
 - *Sense of Purpose:* Our purpose is to inspire and support individuals, communities and organisations to secure improvements in social, economic and environmental well-being.
 - *Improvement:* We will aim to transform the way in which the organisation works, innovating and seeking best practice to help us deliver in more effective and efficient ways. We will aim to continue to make prudent choices, by living within our means and avoiding unnecessary processes and waste.
 - *Working Together:* We will work together to help provide joined-up support and services for Pembrokeshire people, visitors to the county, communities and organisations. We are committed to the continued development of effective partnerships with voluntary, private and public sector bodies within and out of the county.
- 2.4. The cultural change we want to bring about will inform, and also be reinforced by, a new employee appraisal system that is linked to this framework. The new culture types (Purpose, Learning and Results) will inform the new behavioural standards currently being drawn up and will replace the Managers and Employee Standards.

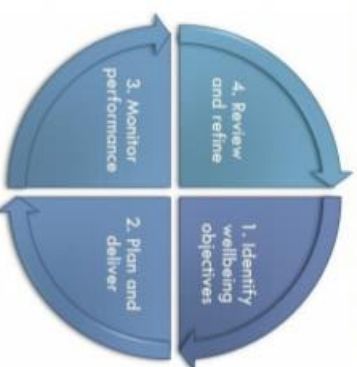
3. Corporate Planning

3.1. The foundation of successful performance management is a coherent approach to corporate planning. It is impossible to monitor progress without first defining what it is you are trying to achieve.

The foundation of successful performance management is a coherent approach to corporate planning. It is impossible to monitor progress without first defining what it is you are trying to achieve.

3.2. Broadly speaking, there are 4 steps to our corporate planning process (which is repeated on an annual basis):

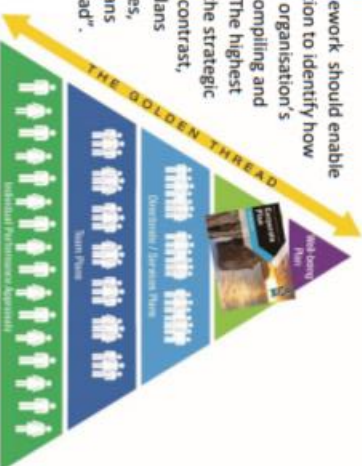
- Identifying our wellbeing objectives
- Planning action
- Measuring our performance
- Reporting and reviewing our progress



3.3. In seeking to ensure that there is widespread ownership of the Council's wellbeing objectives, we endeavour to involve a broad range of stakeholders at each stage of this process. Performance is monitored in a range of managerial and elected member forums, e.g. Corporate Management Team and Overview & Scrutiny Committees. Finally, a cross-section of groups contribute to an annual Improvement Review evaluation of the Council's achievements (which informs our priorities for the following year).

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3.4. A good performance management framework should enable any individuals working for an organisation to identify how their work contributes to achieving the organisation's overall objectives. We achieve this by compiling and publishing a hierarchy of aligned plans. The highest level plans describe our objectives, set the strategic direction and take a long term view. By contrast, individual officer performance review plans are reviewed annually, and in many cases, twice a year. The link between these plans is often referred to as the "Golden Thread".



3.5. Wellbeing Plan for Pembrokeshire - This plan frames public, private and voluntary sector activity in Pembrokeshire over the period 2018-2030. It is produced in partnership with a range of other organisations. It describes the issues that are important to Pembrokeshire and identifies the approach that a range of organisations will adopt in attempting to tackle them. The Wellbeing Plan is based on an analysis of data from a wide range of sources and this information has been brought together in a "Needs Assessment"¹. The Wellbeing Plan is approved by the Pembrokeshire Public Service Board² and endorsed by the County Council (as well as the Boards of other organisations). It is aligned with the seven national wellbeing goals set out in the Wellbeing of Future Generations Act 2015.

Wellbeing Plan for Pembrokeshire - This plan frames public, private and voluntary sector activity in Pembrokeshire over the period 2018-2030. It is produced in partnership with a range of other organisations. It describes the issues that are important to Pembrokeshire and identifies the approach that a range of organisations will adopt in attempting to tackle them. The Wellbeing Plan is based on an analysis of data from a wide range of sources and this information has been brought together in a "Needs Assessment"¹. The Wellbeing Plan is approved by the Pembrokeshire Public Service Board² and endorsed by the County Council (as well as the Boards of other organisations). It is aligned with the seven national wellbeing goals set out in the Wellbeing of Future Generations Act 2015.

3.6. Corporate Plan - This is an annual forward looking plan identifying our Wellbeing Objectives, lists the actions we will be taking during the year to which it relates and sets out the performance measures and standards we use to measure our progress. The Corporate Plan is our principal plan. It is published in April each year once it has been approved by Council.

Corporate Plan - This is an annual forward looking plan identifying our Wellbeing Objectives, lists the actions we will be taking during the year to which it relates and sets out the performance measures and standards we use to measure our progress. The Corporate Plan is our principal plan. It is published in April each year once it has been approved by Council.

3.7. Directorate Plans & Service Plans - some of our services produce individual plans. In instances where a Directorate includes services that have largely the same purpose a Directorate plan has been produced in order to encourage and improve integrated working. These are produced annually and set out the key actions for improvement in each of our service areas. The actions identified are linked to the Wellbeing Plan as well as the Wellbeing Objectives described in our overall Corporate Plan and Programme for Administration. The Plans also require Directors / Heads of Service and Managers to self-assess their performance for the previous year. The results of this evaluation are reported to Corporate Management Team (CMT). This helps define future priorities both for the service and for the authority as a whole. Our Service Plans are finalised during April each year following consideration by Directors and the Chief Executive.

Directorate Plans & Service Plans – some of our services produce individual plans. In instances where a Directorate includes services that have largely the same purpose a Directorate plan has been produced in order to encourage and improve integrated working. These are produced annually and set out the key actions for improvement in each of our service areas. The actions identified are linked to the Wellbeing Plan as well as the Wellbeing Objectives described in our overall Corporate Plan and Programme for Administration. The Plans also require Directors / Heads of Service and Managers to self-assess their performance for the previous year. The results of this evaluation are reported to Corporate Management Team (CMT). This helps define future priorities both for the service and for the authority as a whole. Our Service Plans are finalised during April each year following consideration by Directors and the Chief Executive.

3.8. Team Plans - Some of our larger services may also produce Team Plans, which include a greater level of detail. These plans allow the Service Improvement and Transformation Plans to retain their strategic focus whilst enabling Managers to track the detail of what it is they are trying to achieve.

Team Plans - Some of our larger services may also produce Team Plans, which include a greater level of detail. These plans allow the Service Improvement and Transformation Plans to retain their strategic focus whilst enabling Managers to track the detail of what it is they are trying to achieve.

3.9. Performance Appraisals - These are a crucial element of performance management. Appraisals enable each employee of the Council to identify how they contribute to the goals of their team and the organisation as a whole. Appraisals also help to identify any learning and development opportunities that may assist in the achievement of these goals. Significant changes to how performance appraisal works will be introduced during 2019.

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4. Performance Indicators

- 4.1. In order to monitor our progress against the objectives identified in the plans described above, we monitor a range of performance indicators on an ongoing basis. The suite of indicators we use is made up of various different types of measure, some of which are prescribed by the Welsh Local Government Association. The types of measure we use can be categorised as follows:

Public Accountability Measures (PAMs)	In 2016, Welsh Government revoked the Local Government (Performance Indicators) (Wales) Order 2012, removing the duty on local authorities to submit National Strategic Indicator data. A new set of national performance measures was subsequently introduced to take their place – these indicators are known as Public Accountability Measures (PAMs). From 2019/20 there are 33 of these covering a range of local authority services. Data relating to how each authority performs against these is published every July/August.
Social Services and Well-being Performance Management framework	All local authorities in Wales have to provide data relating to how they perform against this framework. For 2019/20 there are 35 measures (17 of these are based on survey work, 18 are quantitative measures).
Local Measures	These are measures which are set locally. They aim to measure how successful we have been in delivering specific elements of our services.
Well-being of Future Generations, National Indicators	46 national indicators were introduced in 2016. These allow public service organisations to demonstrate how they contribute to national outcomes and indicators are often not available at a Pembrokeshire geographic level. During 2019 Welsh Government commenced a review on how targets may be developed for some of these.

- 4.2. We use a 'balanced scorecard'³ made up of measures of these types, to monitor and manage our performance on an ongoing basis. The scorecard also comprises measures which link with our Well-being Objectives, Programme for Administration, and the national Well-being Goals. For most of our measures we set ambitious targets to help us drive improvement.

- 4.3. The scorecard described above is monitored on a regular basis by a number of Boards within the Council, the roles and responsibilities of which are set out below. The reports considered by these Boards highlight performance issues in specific areas and describe, for each measure on the scorecard, whether or not performance is on target, whether performance is improving or declining and what our performance looks like relative to that of other local authorities in Wales. The reports use a simple 'Red-Amber-Green' rating to make them easier to interpret.

Council	Council receives an annual performance report in the form of an Improvement Review. It is also responsible for approving the Council's Improvement Plan.
Cabinet	Cabinet meets with CMT on a regular basis, and will discuss quarterly reports and performance matters at these meetings.
Overview and Scrutiny Committees	There are five Overview and Scrutiny Committees but one of these concentrates on policy development. The remainder receive reports on the elements of the corporate scorecard that are relevant to the area covered by their theme.
Corporate Management Team (CMT)	CMT is the forum in which the Authority's Chief Executive and Directors discuss operational matters. CMT monitors the corporate scorecard on a quarterly basis. Heads of Service attend CMT on a rolling basis, to explain the factors that may be influencing performance in their area.
Directorate Management Teams (DMTs)	These perform an important function in helping to ensure the flow of information around the Authority. They also consider performance information, including the relevant elements of the corporate scorecard, and co-ordinate the drafting of Service Plans.

- 4.4. The process of managing performance is far more involved than simply monitoring the scorecard via the mechanisms described above. The action pursued following the identification of issues at these levels is crucial. The Boards will request update reports on instructions given in relation to performance issues.

6. Self Evaluation

- 6.1. An important element of any performance management system is the process of reviewing or evaluating performance. In reality, this is an ongoing process performed by staff and managers on a daily basis. However, it is also important to involve a broad range of stakeholders in an overall assessment of the Council's performance. We conduct such an assessment on an annual basis and publish the results in the form of an Improvement Review.
 - 6.2. The Improvement Review, as well as giving an account of performance across all Council services, details our progress against the previous year's Corporate Plan. It is one of the key mechanisms through which we are held to account. It contains a comprehensive set of performance indicators, with comparisons back to previous years and with other local authorities. It also details progress against the actions identified in our Corporate Plan. The Improvement Review is published in October each year following its approval by Council.
 - 6.3. While the publication of the Improvement Review is important, it is the process of self-evaluation and assessment that has the greatest impact on the organisation's ability to secure continuous improvement. It achieves this in two ways. First, by involving managers, staff and members in the production of the Review, greater ownership of the improvement agenda is fostered. This in turn is more likely to stimulate the intrinsic motivation which we know drives improvement to a greater extent than simply issuing instructions. Second, genuinely open and honest self-evaluation aids with the identification of priorities for future years and encourages organisational learning.
 - 6.4. The timetable for producing the review plans, as well as our corporate plans, is the same each year. The publication dates for the Corporate Plan and Improvement Review are defined in law, but are also designed to drive our budget planning cycle, to help us ensure that our arrangements to achieve our priorities are adequately resourced.
 - 6.5. We anticipate that proposals to change the legal framework is due to be published by Welsh Government in December 2019. Based on informal soundings that Welsh Government has undertaken, we anticipate that the new framework will place much more emphasis on self-evaluation. The Council supports this direction.
-

EV2

13 Collection of information related to performance

- (1) A Welsh improvement authority must make arrangements for—
 - (a) the collection of information which will allow it to assess whether it has met during a financial year those improvement objectives set under section 3(1) which are applicable to that year;
 - (b) the collection of information which will allow it to—
 - (i) measure its performance during a financial year by reference to those performance indicators specified under section 8(1)(a) which are applicable to the authority for that year;
 - (ii) assess whether it has met during a financial year those performance standards specified under section 8(1)(b) which are applicable to the authority for that year;
 - (c) the collection of information which will allow it to—
 - (i) measure its performance during a financial year by reference to those self-imposed performance indicators which are applicable to that year;
 - (ii) assess whether it has met during a financial year those self-imposed performance standards which are applicable to that year.
 - (2) For the purposes of this section and sections 14 and 15—
 - (a) a self-imposed performance indicator is a factor by reference to which a Welsh improvement authority has decided to measure its performance in exercising its functions; and
 - (b) a self-imposed performance standard is a standard which a Welsh improvement authority has decided to meet in relation to a self-imposed performance indicator.
-

EV3

- 4.1 In order to support the setting of improvement objectives, and to better fulfil their community leadership ambitions, authorities will need to move from performance management arrangements that just cover the delivery of services that they provide to one that is aware of, and informed by, the effects that its provision of services and activities have on an area and its communities. This would include management of, and an evaluation of, the impact that the authority has on the community strategy outcomes.
- 4.2 Accordingly authorities should look to use a much wider 'basket' of evidence to assess the performance of their services and the impact they are having on the outcomes for citizens and communities. This will necessarily rely on authorities taking into account a wide range of evidence to use as improvement information. While performance indicators remain important sources of objective and comparable evidence, they do not necessarily yield a full picture of service quality or of users' experience of it. This 'basket' of evidence may include any of the following:
- performance indicators (whether statutory, standard or local);
 - satisfaction data: citizen surveys, views of users', tenants' or citizens' panels or juries (including the National Survey for Wales);
 - the number and nature of calls to contact centres or other points of contact with citizens;
 - service usage levels;
 - the outcomes of service assessments and peer reviews;
 - the outputs from an authority's scrutiny process;
 - audit, regulatory and inspection findings;
 - levels of accreditation to recognised assessment schemes;
 - intelligence relating to a need for a project or programme (e.g. the construction of a new amenity); and
 - intelligence relating to a need for a new, or more innovative, means of service delivery.
- 4.3 Authorities are now required to use this improvement information that they collect in order to compare their performance with their own historical performance in previous financial years and with other authorities who provide similar services.
-
- 4.14 The nationally prescribed performance measures aim to capture performance across all the service areas they cover. They are not, though, fully comprehensive and cannot, in particular, measure delivery of particular local policies, priorities or projects, to which authorities are committed. And clearly they will not measure progress towards objectives that do not lend themselves to quantifiable measurement. Without ways of measuring those too the performance measurement framework would be neither comprehensive nor balanced within each authority.
- 4.15 Authorities should thus continue to develop and use their own local performance measures which reflect their individual circumstances and aspirations, as well as supporting detailed management and operational decisions. Moreover having decided on their improvement objectives authorities will need to be mindful of any additional data requirements that may arise and set local indicators for themselves accordingly. They should also use non-quantitative assessment tools as and when appropriate. In some cases, such approaches may be relevant to and usable by other authorities too, and authorities should thus again be willing to share their experiences of developing and using local indicators with their peers. However, section 9 of the Measure provides authorities with the power to collaborate, and section 12 requires authorities to consider whether such collaboration would assist in the discharge of their improvement duties. If so they must seek to exercise that power. Sharing experiences and indicator information is likely to fall within these provisions.
-
- 4.16 Authorities will clearly require additional contextual data or community intelligence that will help them decide their improvement objectives and support their systems of governance and accountability. This additional improvement information is necessary for authorities to take into account the external factors that may impact upon a place or communities and will assist an authority in identifying and understanding:
- the needs and aspirations of all sections of the communities and other stakeholders that they serve, including future generations;
 - Factors that might both threaten and offer opportunities for enhancing all aspects of community well-being; and feeding this information into all stages of the planning, delivery and evaluation cycle.
-

IMPROVING WELL-BEING

Sustainable development and well-being duty on public bodies

2 Sustainable development

In this Act, “sustainable development” means the process of improving the economic, social, environmental and cultural well-being of Wales by taking action, in accordance with the sustainable development principle (see section 5), aimed at achieving the well-being goals (see section 4).

3 Well-being duty on public bodies

- (1) Each public body must carry out sustainable development.
- (2) The action a public body takes in carrying out sustainable development must include –
 - (a) setting and publishing objectives (“well-being objectives”) that are designed to maximise its contribution to achieving each of the well-being goals, and
 - (b) taking all reasonable steps (in exercising its functions) to meet those objectives.
- (3) A public body that exercises functions in relation to the whole of Wales may set objectives relating to Wales or any part of Wales.
- (4) A public body that exercises functions in relation only to a part of Wales may set objectives relating to that part or any part of it.

4 The well-being goals

The well-being goals are listed and described in Table 1 –

A healthier Wales.	A society in which people’s physical and mental well-being is maximised and in which choices and behaviours that benefit future health are understood.
A more equal Wales.	A society that enables people to fulfil their potential no matter what their background or circumstances (including their socio economic background and circumstances).

5 The sustainable development principle

- (1) In this Act, any reference to a public body doing something “in accordance with the sustainable development principle” means that the body must act in a manner which seeks to ensure that the needs of the present are met without compromising the ability of future generations to meet their own needs.
- (2) In order to act in that manner, a public body must take account of the following things –
 - (a) the importance of balancing short term needs with the need to safeguard the ability to meet long term needs, especially where things done to meet short term needs may have detrimental long term effect;
 - (b) the need to take an integrated approach, by considering how –
 - (i) the body’s well-being objectives may impact upon each of the well-being goals;
 - (ii) the body’s well-being objectives impact upon each other or upon other public bodies’ objectives, in particular where steps taken by the body may contribute to meeting one objective but may be detrimental to meeting another;

Learning

As a learning organisation, we encourage vision, innovation and creativity. People are engaged with continuous learning & development, they are empowered to be ambitious, trusted and are receptive to change.

As Employees we:

Seek and share best practice from internal and external sources, put forward and are receptive to creative and innovative ideas, suggestions and solutions.

Are proactive in seeking learning opportunities and take personal responsibility for continuous personal and professional development.

Practice self-reflection, thinking 'How can we do this better?'

Demonstrate a willingness to change, accepting and promoting new ideas, and are willing and able to challenge constructively.

As Managers we:

Empower and encourage staff to put forward their creative and innovative ideas. Enable an ongoing learning environment, creating opportunities and protected space that encourages development.

Allow and accept mistakes and provide constructive feedback in order to improve and develop.

Are open-minded to different ways of doing things, are prepared to be challenged, learn from mistakes and successes, listen to new ideas and seek to recognise and understand different perspectives.

Exhibit humility and self-awareness, actively seeking to understand staff needs.

As Senior Leaders we:

Identify experimental innovations for service delivery, challenge practice and empower people to deliver them, actively encouraging different ways of working.

Actively support and value learning & development and adopt a learn, share, apply and reflect approach in an environment where learning is valued.

Demonstrate trust and trustworthiness, equality and learning.

Effectively communicate in a clear, meaningful and positive way and challenge unhelpful practices.

Results

As a results focused organisation we strive to achieve excellence through working collaboratively, managing risks and resources and providing clarity of direction. People are inspired to take ownership and find solutions.

As Employees we:

Demonstrate proactive, productive participation in achieving individual, team and departmental goals.

Aim for excellence in the delivery of services, work with others to meet deadlines and standards to achieve better outcomes for people.

As Managers we:

Set positive challenges and achievable, realistic goals whilst communicating clear priorities.

Trust employees and empower them to make decisions, take managed risks and implement changes to achieve their targets.

Clearly communicate and role model what good practice looks like.

As Senior Leaders we:

Set an example and inspire those around them to achieve and strive for top performance.

Look ahead, plan for the long term and have a vision for their service. Formulate, understand and communicate clear and appropriate outcomes for their organisation.

Are accountable for the delivery of strategic aims and objectives of the authority by taking ownership of corporate initiatives, our services and their results.

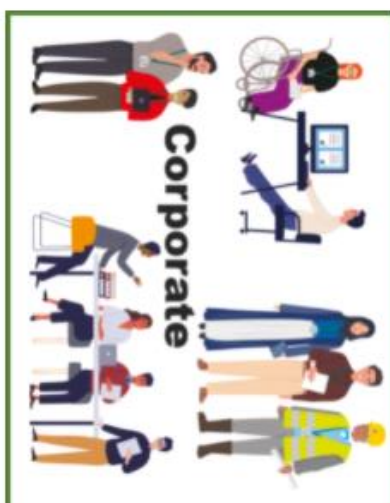
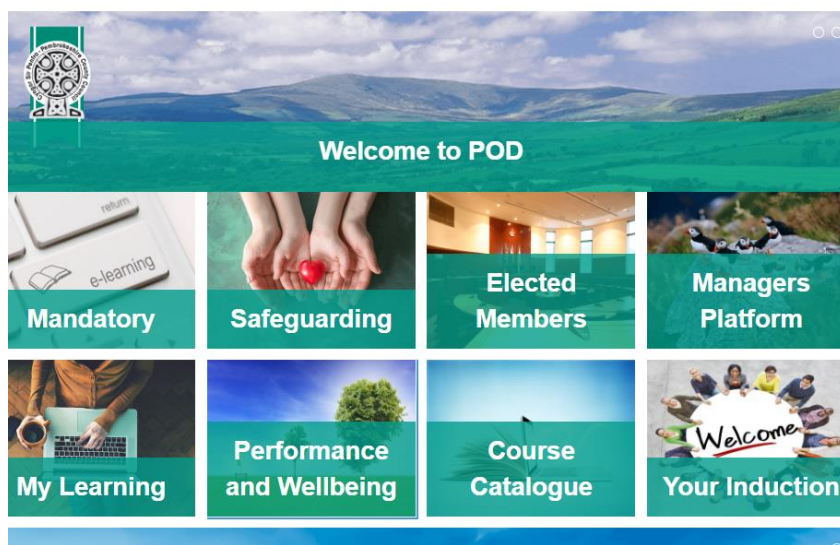
EV6

Meeting Notes: Performance Management at PCC

Julia Allen, HR Manager – 03/08/2021

- New framework was to be introduced from 2020.
- The aim has been for the 'Golden Thread' to run through all areas of the business with a revised performance management plan a key part of this. This was the aim with the new behaviour standards launched in 2019 – a complete overhaul of our culture with Business Plan.

- Undoubtedly the covid pandemic has slowed the change.
- The takeup with training has been slow. The piloting hasn't been happening with managers.
- Social Services have the monthly supervision structure and this planned change was an attempt to bring that consistency to the whole organisation. Their approach is visible, expected by the team because it is so consistent and that's where we want us all to get to.
- Performance Management sat with policy until a few years ago when it came back to HR – specifically Learning and Development.
- This the time of year would have had Annual Review/Appraisal normally.
- It is inconsistent currently. I can't remember the last one I had.
- We struggle to find the time for reflection as there is a never a time that we're not busy. It should be fluid, something we just do naturally.
- Any conversation with the manager should count as developmental but in many cases, even scheduled development conversations end up getting bogged down by the day to day and operational issues.
- E-Learning on the POD is the first stop for most managers. There have also been management training sessions held in the last few months to start the roll out of new performance management process.
- Incremental pay hasn't been dictated by the annual review in a long time. With the NJC, pay increments are seen as inevitable and only in a few cases would we withhold an increment due to capability.
- I agree that people don't feel invested if the pay increase is inevitable but this is a factor in public service so this is how it is done. Performance based pay could be impactful but not practical for us.
- The aim has been to have quarterly reviews. Again, not speaking about the role but speaking about development.
- Some services do group performance management – particularly tailored for manual roles eg. Cleaners.
- As an HR department and within corporate services we often see a whole organisation approach but quite often this isn't how individual departments see themselves. All the staff in an individual school are council employees, staff in a library the same but they tend to think of the school or the library as their employer. This is challenging when trying to create unified HR systems.
- There is value in supporting the rollout of the new performance management system. Helping get buy in from managers. Looking at wellbeing and capability as opportunities in some of the areas you work in – Finance and Building Maintenance
- Look into the career development programme through Academi Wales – Manager Build including managers like Jeremy James



Pembrokeshire County Council has two performance plans :-

Vocational – aimed at employees in a functional role eg Loader, Contact Centre Assistant

Corporate – aimed at employees in a business or administrative role eg Accounting Technician, HR Assistant

If you are an **employee**, your line manager will discuss which process you will follow, you will need to complete the relevant employee e-learning



If you are a **manager**, you will need to complete the employee e-learning prior to completing the manager's e-learning

If you have more than one role but report to one manager your plan will need include aspects of all job roles

If you have more than one manager, you will need to have a separate plan for each manager.

Customise this page



Administration

- ▼ Course administration
- Enrolment options

Corporate Performance and Wellbeing Plan

Enrolment options

 Corporate Performance and Wellbeing Plan

▼ Self enrolment (Learner)

No enrolment key required.

Enrol me





Welcome to POD

Corporate Performance and Wellbeing Plan

Welcome to the Corporate Performance and Wellbeing Plan Course. This course is a short course to help you complete your Performance and Wellbeing plan.



My Learning



Performance & Wellbeing



Course Catalogue



Corporate Welcome

Click or tap on the blocks below to find out more



The Golden Thread



A good performance management framework should enable any individuals working for an organisation to identify how their work contributes to achieving the organisation's overall objectives. We achieve this by compiling and publishing a hierarchy of aligned plans. The highest level plans describe our objectives, set the strategic direction and take a long term view. Your Line Manager will make you aware of the plan for your team and how this links with the organisation's objectives. The link between these plans is often referred to as the Golden Thread.

Wellbeing

Wellbeing is a word used to describe how we feel and function and looks at our overall life experience including work. *Wellbeing* exists in two dimensions: **Subjective** or personal wellbeing which looks at how we think and feel about our lives, and includes aspects such as life satisfaction, positive emotions, and whether life is meaningful to us. **Objective** wellbeing looks at basic human needs and rights, including having adequate food, good physical health, education, safety etc.

Questions a manager may ask during appraisal:

1. How are you?
2. Are there any problems with your work or your colleagues that are causing you any concern?
3. Do you think there is any additional advice or support that the council can offer you to improve your wellbeing?
4. Do you know how to access any of the health & wellbeing information available on the intranet?
5. Is there anything else that you would like to share or have help with from me or another service e.g. HR / L&D/OH?

Status

- This allows you to record the current status of an objective
- There are three options:- not started, in progress and completed. These can be updated to reflect the objective
- In the current climate with ever changing priorities an objective might remain in progress or marked as completed. The comment included in the comment box might highlight that an objective has changed due to other priorities
- This approach is flexible and supports corporate roles with ever changing demand rather than an objective that is set for the next twelve months but never reviewed.

Objective Name	Status
Behaviour Standard	In Progress
Budget Management	In Progress
Golden Thread	In Progress
Learning & Development	In Progress
Webinar project	Not Started
Wellbeing	In Progress

Evidence

Objective Name	Status	Courses	Evidence
Behaviour Standard	In Progress	0	0
Budget Management	In Progress	0	0
Golden Thread	In Progress	0	0
Learning & Development	In Progress	0	1
Webinar project	Not Started	0	0
Wellbeing	In Progress	0	0

This process allows for evidence to be added to a record. This might include a completion certificate, quotes or feedback received.

Details on how to add evidence can be found under resources on the course page.

Priority

- You will need to discuss and agree the priority of an objective with your line manager
- This could be low, medium or high
- An objective can go up or down based on the priorities within the role.

Objective Name	Status	Courses	Evidence	Priority
Behaviour Standard	In Progress	0	0	Low
Budget Management	In Progress	0	0	Medium
Golden Thread	In Progress	0	0	Low
Learning & Development	In Progress	0	1	Low
Webinar project	Not Started	0	0	High
Wellbeing	In Progress	0	0	Low

Comments

Objective Name	Status	Courses	Evidence	Priority	Comments
Behaviour Standard	In Progress	0	0	Low	0
Budget Management	In Progress	0	0	Medium	1
Golden Thread	In Progress	0	0	Low	0
Learning & Development	In Progress	0	1	Low	0
Webinar project	Not Started	0	0	High	0
Wellbeing	In Progress	0	0	Low	0

The comment box allows both line manager and team member to add updates when appropriate

This could include progress on an objective and extra information appropriate to the objective

Please remember that any comments added will remain on the record. Personal or sensitive information should only be recorded if both parties agree.

The number of comments added is recorded.

Due Date

Each objective will have a due date. These can be different but a best practice suggestion would be that these are reviewed as part of your regular one to one conversations. These could take place face to face, online or over the telephone.

Objective Name	Status	Courses	Evidence	Priority	Due date	Comments
Behaviour Standard	In Progress	0	0	Low	31 10 2021	0
Golden Thread	In Progress	0	0	Low	31 07 2021	0
Partnership working	Not Started	0	0	Low	31 10 2021	0
Team Management	In Progress	0	0	Medium	30 09 2021	0
Wellbeing	Completed	0	0	Low	31 08 2021	0

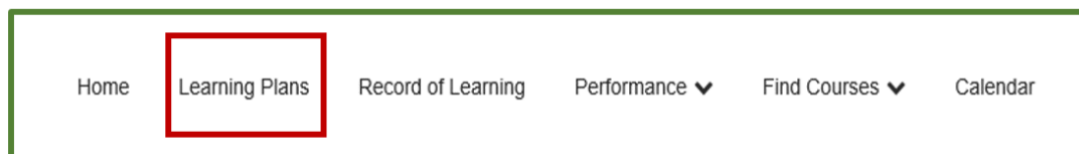
Creating a Corporate Performance and Wellbeing Plan



Click the headings below for more information

Log in

- Log into POD
- Click Learning Plans at the top of the screen
- You can see all your current / completed plans.



You can see that there are three tabs, **Overview**, **Objectives** and **Courses**. We will look at what information is needed for each tab.

Overview

- When you and your line manager have agreed what you want to put in the overview
- Click Edit details
- Enter the information
- Click Update plan at the bottom of the page.

Overview Objectives

Below is a short summary of your learning plan. There are required fields in this form marked *

▼ Plan details

Plan name* Corporate Performance & Wellbeing Plan 20

Plan description

Enter a brief overview of the plan - here (this will need to be agreed with your manager)

Date started* 1 October 2020

Completion date* 31 March 2021

Update plan Cancel

Courses

Overview Objectives Courses

All the courses that form your learning plan are shown below. You can view any course by clicking the course title. Clicking "Add courses" will allow you to request to add new courses to this learning plan.

Add courses

Course Name	Progress	Evidence	Due date	Comments
Data Protection Essentials	Launch course	100%	31 05 2021	0
Safeguarding Children, Young People & Adults (mandatory)	Launch course	Not started	31 05 2021	0

There are a number of mandatory on-line courses that staff need to complete, you can add these to your Performance and Wellbeing Plan under the Courses tab. There may also be additional courses that your manager feels are relevant to your job role.

Meeting Notes: Performance Management at PCC

Julie Watkins, Learning and Development Coordinator – 12/08/2021

Potential Questions:

-What training is provided aside from e-learning on POD?

-What has the uptake been in the new performance management structure?

-Opportunities for improvement?

-Team/Departments who you need support with?

-How do you see the work in Performance Management enhancing the other work in HR?

- It would be great if you could take part in a training session coming up. I can send you the slides but it would be beneficial for you to see what managers are asking.
 - You have completed the e-learning which is great, uptake is slow currently but certain areas have engaged more than others.
 - The manager training session is there to give managers a full understanding of the golden thread and how performance management fits alongside all the other changes to improve communication, feedback, coaching etc.
 - E-learning is factored into the manager training session so that every manager is shown how to create and maintain a plan for their staff.
 - There is an e-learning plan for Managers, Corporate and Vocational staff
-
- The guidance is for managers to see review staff on an individual basis if they are Grade 7 or above while they will see staff in groups for Grades 1-6.
 - Grade 6 may seem quite a high grade to review in groups but this is all geared to making this a regular practice, which is less time consuming for everyone and enables those that need support the help they need.
 - There is also a slightly different framework for Corporate and Vocational staff. We found that priorities are different and focus changes more regularly in Corporate roles while it would be a waste of time to review too regularly.
 - Those in vocational roles are reviewed every 6 months
 - Those in corporate roles should be reviewing every month
 - We don't want to step on the toes of any other processes. The monthly supervisions that social workers already do more than accommodate for performance management. We don't ask them to use the new framework as they are already delivering
 - Funding has come from MIND and forms part of the Wellness Action Plan for Pembrokeshire
 - This also fulfils our commitment to the Wellbeing of Future Generations Act 2015 – I recommend the video for the act about Megan.
-
- There are some areas who haven't met their managers properly or had a single developmental conversation since the pandemic started. This is not good enough and we need to do better.

- There is a silo mentality. People don't consider themselves part of the council so it is difficult to come up with a unified approach. This is why we have tried to offer flexibility without confusing anybody.
- We want everyone to complete the corporate welcome so they see the bigger picture.
- We are still in the soft launch period so data is still unreliable. We want to encourage teams to engage in this rather than make it mandatory currently.
- With the previous system, take up was awful at under 25%. I believe this was reflective of certain areas who did not engage
- There hasn't been much engagement from wider HR and that's a shame as I think there are some real benefits to be had from good performance management and wellbeing. Particularly around the absence management which you are involved in as I know poor mental health has had a huge impact this year.
- Spreading the word amongst your colleagues would be very helpful in improving uptake.
- We have struggled mostly in the vocational areas eg. facilities, building maintenance, the contact centre as there is a combination of constant work with them also not seeing the value in these conversations. There is also a challenge within HR itself, finance and legal all have opportunities for improvement.
- I'd recommend the following sessions also for you to attend:
 - Project Management Training
 - Effective Communication Training

EV10



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 12 August 2021 16:43
To: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Subject: RE: Manager Platform & Mailing List

Thank you Julie, this is very helpful.

As I suggested I will be in touch with some managers in my areas to promote the performance and wellbeing session and exploring the platform. I'll let you know how I get on.

I'll be in touch if I have any other questions.

Thanks again,
 Duncan

Duncan Hook
 Employee Relations Adviser
 Human Resources
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 Haverfordwest
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Duncan.Hook@pembrokeshire.gov.uk

From: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Sent: 12 August 2021 16:19
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: Manager Platform & Mailing List

Hi Duncan

It was good to talk to you again today. In addition to sending the training keynote to you, I've enrolled you on the Manager Platform, the link below. I've also added you to the Manager Mailing List so you'll get future Insight magazines and Midweek Motivation videos sent to you.

<https://pembrokeshire.learningpool.com/course/view.php?id=87>

Let me know if you need anything else.

Regards/Cofion

Julie

Julie Watkins

Learning & Organisational Development Advisor

Pembrokeshire County Council

Pembrokeshire Archive

Prendergast

Haverfordwest

Pembrokeshire

EV11

Managers' Platform

- Participants
- Badges
- Grades
- General
- What's New
- Leadership & Management Development Programme
- Resources
- Websites
- Insight
- Midweek Motivation
- Webinars
- What's Available
- Leading Remote Teams
- e-learning
- Wellbeing
- Articles
- Videos/Podcasts
- Forums

Administration

Managers' Platform



Effective leaders and managers are vital to the success of an organisation, the current nature of managing within a volatile and uncertain business environment means that leaders and managers require new skills and solutions for motivating, developing and managing their teams. Alongside this we all recognise that the Authority is entering a period of significant and sustained change, the successful implementation of its change programmes will be reliant on the leadership and management skills of all our managers. The Authority is responding by ensuring that leaders and managers have the skills, knowledge and support needed to manage their teams successfully.

I'm pleased to introduce The Managers Platform, it is an area of POD that is designed to be a useful resource for you, it will provide information regarding the leadership and management opportunities currently available, links to useful articles, TED Talks and podcasts, a back catalogue of the Insight newsletter and links to e-learning modules. It will also host forums and live chats for both those managers undertaking a programme of development and also all managers from across PCC. This is your area, if there is something that you would like to see included please let a member of the Learning and Development team know.

Richard Brown, Interim Chief Executive

e-learning

Wellbeing

Managers Guides

- Mobile Phone & Web Applications to Support Mental Well Being
- How to support your staff's mental health and wellbeing during challenging times
- Your guide to mental health and wellbeing
- Work Life Balance Assessment
- Leading Remote Teams - Wellbeing Resources
- Samaritans Cymru Working With Compassion (English)
- Samaritans Cymru Working with Compassion (Welsh)

Articles

Videos/Podcasts

EV12

Learning Plans

- [Manage plans](#)

Unapproved Plans

- **Knowledge of PCC Performance Management**

Record of Learning

- [All Learning](#)
- [Active Learning](#)
- [Completed Learning](#)

Plan: Knowledge of PCC Performance Management

Overview

Objectives

Courses

Below is a short summary of your learning plan.

▼ Plan details

Plan name

Knowledge of PCC Performance Manageme

Plan description

To build knowledge of Performance and Wellbeing framework in PCC in order to promote with managers and staff in HR and my areas of responsibility.

To achieve this:

- Attend a P&W Training session
- Complete e-learning
- Meet with L&D to understand more and gain additional information

Date started

12 August 2021

EV13



Objectives

- Explore the importance of engaging with team members
- Describe the outcomes of an effective appraisal system
- Demonstrate the difference between the Corporate and Vocational approaches
- Demonstrate an understanding of the mandatory objectives
- Explore the importance of effective
 - Performance Management
 - Feedback
 - Setting objectives
- Complete the e-learning modules on POD

Question

Why is engaging with your team important?

Moving forward the way that we undertake performance appraisals will change. Following approval we have moved to a new approach, the **Performance and Well-being Plan** and this has been designed and tested and will be hosted on our e-learning platform (POD).

The intention is to make it a more positive, forward thinking approach with an emphasis on the work that you are doing in the present.



In order to meet the needs of the diverse roles within PCC, the new system has two approaches:

Corporate Approach A monthly conversational online 'Check-in', aimed at those employees whose pieces of work regularly change along with levels of priority. Accounting Technician/HR Assistant

Vocational Approach A set of 10 questions, minimum completion online once every six months. Aimed at employees whose role follows the same daily functions. Contact Centre Assistant/Loader



April 1st
March 31st

Design of the **Performance and Well-being Plan** was based on current research and supported with feedback and involvement from focus groups. The plan has been piloted over the last few months and we would now like to encourage you to use this new process during 2021.

The performance cycle will continue to run from April 1st – March 31st each year.

This year is a soft launch and we are encouraging managers to undertake/try out the process this year. It will become mandatory from April 1st 2022.

Performance & Wellbeing plans will be retained online and will remain confidential.



Performance management broadly aims to monitor, maintain and improve employee performance in line with an organisation's objectives. It's not a single activity, but rather a group of practices that should be approached holistically.

There's no standard definition of performance management but it describes activities that:

- 1. Establish objectives** through which individuals and teams can see their part in the organisation's mission and strategy.
- 2. Improve performance** among employees, teams and, ultimately, organisations.
- 3. Hold people to account** for their performance by linking it to reward, career progression and termination of contracts

EV14

✓                                                                  

From: Allen, Julia <Julia.Allen@pembrokeshire.gov.uk>
Sent: 16 August 2021 09:46
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Performance and Wellbeing

Hi Duncan

Yes of course worth dropping this into conversations with the managers. Good to get them through the training and running some sessions – especially finance who already do some informally. No rush though as we have time before next April.

We haven't discussed what support HR will offer L&D yet so it would be good to hear how you get on with getting buy in.

Thanks
Julia

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 13 August 2021 16:03
To: Allen, Julia <Julia.Allen@pembrokeshire.gov.uk>
Subject: Performance and Wellbeing

Hi Julia, I hope you're well.

After our conversation last week I have met with Julie Watkins, gone through the training with her and explored the resources available. There is a lot there to explore which I think we will have some work in engaging managers with before the full launch next April.

Through the conversation with Julie, she confirmed that manager take up has been poor in some of our areas; namely, Finance and Building maintenance. I was thinking of speaking with them in the coming weeks and offering my support. I just wanted to check in with you first in case there was already a plan in mind.

Finance will be expected to have performance conversations every month individually with their team while Building Maintenance will meet every 6 months either individually or in groups for Grades 6 and below. I think this will help them in the long run with a lot of the mental wellbeing concerns as they're more likely to catch this early.

Thanks,
Duncan

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EV15

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Sent: 16 August 2021 11:30

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: Performance and Wellbeing

Hi Duncan

I must confess that I am slightly behind on this so yes that would be a great help. I know that Gareth is usually open to these processes so he may have already been to a training session but it would be good to speak to him about it. I was also go to ask you and Emma to support me with this later this year and in the new year as this will be mandatory and I think it will become a bigger task.

Let me know how your conversations with Gareth go.

Thanks

Jo

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 13 August 2021 16:09

To: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Subject: Performance and Wellbeing

Hi Jo, I hope you're well.

Yesterday I met with Julie Watkins in Learning and Development to discuss the Performance and Wellbeing framework. She explained that we are in the 'soft launch' phase of the rollout with it becoming mandatory next April which is currently reflected with quite slow take-up of the new system. I have gone through the training with her and explored the resources available on POD.

I also asked how I and HR can support the rollout. We talked about awareness amongst certain areas as being slower, with facilities being one the areas which could do with support from you and me. I am already speaking with Gareth Howells next week and I will be offering my support in performance management if needed. I just wanted to check in with you first in case you already had a plan to roll this out.

The facilities sessions will mostly be in groups held every 6 months and I would be interested in joining if you think they will be open to that.

Thanks,

Duncan

Duncan Hook

Employee Relations Adviser

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EV16

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 20 August 2021 11:07
To: James, Emma <emma.james@pembrokeshire.gov.uk>
Subject: RE: Performance Management Contact Centre

Ok great, I'll see you next Tuesday.

From what I understand, the contact centre count as vocational so they would have a performance and wellbeing conversation every 6 months. Also as they are below grade 7 these would be in small groups. This is obviously the minimum expectation but should be achievable for the team as they are consistently busy.

Thanks,
Duncan

Duncan Hook
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From: James, Emma <emma.james@pembrokeshire.gov.uk>

Sent: 20 August 2021 10:52
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Performance Management Contact Centre

Hi Duncan

Yep thanks for this I did speak with Julia last week as I know that the contact centre have been slow to get to grips with the system. I think that Jeremy has had the training but I don't know if he has had a chance to get started yet as it's probably not a priority.

From what I understand they used to have informal reviews every few months and a one formal review a year so I imagine they can fit this in instead. As you say the demand on the team has been massive so that could also explain the delay.

Let's talk next week about this as I'd like to hear how you've got on with your services so far.

Thanks

Emma

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 20 August 2021 09:06
To: James, Emma <emma.james@pembrokeshire.gov.uk>
Subject: Performance Management Contact Centre

Morning Emma!

After the conversation we had last week about the high levels of stress experienced in the contact centre with them dealing with unreasonable customers, I wanted to pass on some resources I had from L&D that should help in the long term.

As you know, the new Performance and Wellbeing framework has been introduced a year before it becomes mandatory next April. According to Julie Watkins, quite a few of my areas have been slow to start implementing this new framework and this is also the case for the contact centre. This also correlates with these areas having some of the biggest challenges in terms of sickness absence relating to psychological wellbeing.

Do you know if Jeremy has attended the Performance and Wellbeing training session yet? There is also the e-learning module which he can access which could help. I'm sending some of the resources I've had from Julie which were helpful in understanding the programme and how it will be beneficial. I would however, also recommend attending a session to hear it a bit more fleshed out.

Let's have a chat about this next time we're both in County Hall. I should be in next Tuesday if you are?

Kind regards,
Duncan

Duncan Hook
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EV17

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 10 September 2021 10:23
To: Drummond, Richard <Richard.Drummond@pembrokeshire.gov.uk>
Subject: RE: Performance and Wellbeing - Waste

Ok great, yes I'm in on Wednesday so we can go through it then.

The training is good but I think it comes alive when you talk through it. There isn't huge pressure on vocational roles like waste to meet regularly but I think it will help them and hopefully will encourage conversation.

See you next week, have a good weekend!

Kind regards,
Duncan

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From: Drummond, Richard <Richard.Drummond@pembrokeshire.gov.uk>

Sent: 10 September 2021 10:18

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: Performance and Wellbeing - Waste

Morning pal, thanks for this.

No I've not done the training yet, is it good? I'm in Thornton next Wednesday if you're about?

Kind regards

Richard

Richard Drummond
Employee Relations Advisor

Pembrokeshire County Council

07435 800 529



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 10 September 2021 10:07

To: Drummond, Richard <Richard.Drummond@pembrokeshire.gov.uk>

Subject: Performance and Wellbeing - Waste

Hi Richard, I hope you're well.

I've been working with the team in Building Maintenance to kickstart the new Performance and Wellbeing programme. They've had one session which I understand was a success, particularly in opening the door to more open conversations around capability and mental health which the managers haven't been too comfortable handling.

I know that the teams you support in waste have similar barriers to talking to their managers so I think it could be equally beneficial for them. I know you've been off recently so wasn't sure if you've had an opportunity to attend the training on Teams or on POD.

I've been through the training and feel fairly confident that I can take you through the new structure. If you like I'm happy to set up a meeting so we can go through this together.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
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Duncan.Hook@pembrokeshire.gov.uk

EV18

From: Drummond, Richard <Richard.Drummond@pembrokeshire.gov.uk>
Sent: 15 September 2021 14:49
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Performance and Wellbeing resources

Hey Dunc, no probs. Thanks for going through it and those bits.

Yes it all makes sense. I know I'll get some pushback as the boys aren't always up for talking about themselves but they need to have more opportunity to do this type of thing.

My feedback for I&d is to do with the frequency and structure of this, I don't know how helpful this is every 6 months if it's about building manager relationships. Also the group setting might work but it might also mean people hide behind others. Not writing it off, just be good to see how it works for waste and buildings, they do like to bottle it up.

Kind regards

Richard

Richard Drummond
Employee Relations Advisor



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 15 September 2021 13:32
To: Drummond, Richard <Richard.Drummond@pembrokeshire.gov.uk>
Subject: Performance and Wellbeing resources

Hi Rich, good to catch up today.

Here are the resources we looked at this morning. I think we covered everything and hope it made sense. The programme becomes mandatory next April but to be honest I think the structure would be worth implementing now for all the Thornton teams and getting feedback to share with L&D.

Let me know how you get on with waste! It would be interesting to see how they take to it. As we discussed, these are not intended to be like the old annual reviews and should be much more of an opportunity to look forward and have an opportunity to discuss challenges and talk about possible solutions.

Thanks again,
Duncan

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EV19

When 18 August 2021 09:00-10:00 | **Location** Thornton HR office

-----Original Appointment-----

From: Hook, Duncan

Sent: 12 August 2021 17:14

To: Marchant, Phil

Subject: HR Catch up

When: 18 August 2021 09:00-10:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Thornton HR office

Hi Phil, I hope you're well.

I'm in Thornton next week if you're available at 9? I know you wanted to discuss [REDACTED] and [REDACTED] in particular.

As well as absence, I'd also like to discuss the new Performance and Wellbeing structure that has launched and see how you're getting on with it so far.

Look forward to catching up.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest

EV20

When 18 August 2021 11:00-12:00 | **Location** Microsoft Teams Meeting

-----Original Appointment-----

From: Hook, Duncan

Sent: 12 August 2021 17:05

To: Howells, Gareth

Subject: HR Catch up

When: 18 August 2021 11:00-12:00 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi Gareth, I hope you're well.

I know we're due to meet to catch up about current absence in facilities, I hope you don't mind doing it on Teams as I'm not in County Hall.

As well as absence, I'd also like to discuss the new Performance and Wellbeing structure that has launched and see how you're getting on with it so far.

Look forward to catching up.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall

EV21

When 23 August 2021 13:00-13:30 | **Location** Microsoft Teams Meeting

-----Original Appointment-----

From: Hook, Duncan

Sent: 12 September 2021 20:27

To: Philpin, Dean

Subject: HR Catch Up

When: 23 August 2021 13:00-13:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi Dean, I hope you're well and had a good holiday.

I can see you've got a busy week ahead but if possible could we meet over Teams on the date above?

I know it's been fairly quiet in terms of sickness absence but open to discussing this with you if there is anything I can help with. I would also like to discuss the new Performance and Wellbeing framework and see how it's been going in your teams.

Hope to catch up soon,
Duncan

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

EV22

Meeting Notes

Phil Marchant (Building Maintenance)

18/08/2021

Discussion Points:

- **Awareness of new Performance & Wellbeing Plan**
 - **Completion of training for P&W plan**
 - **Attitude towards the new P&W plan**
 - **Confidence in starting the P&W Appraisal process**
 - **Any support that I/HR can offer**
-
- Is aware of the new plan and that this is mandatory from next year and has gathered from colleagues that it centres around online communication
 - Hasn't been holding appraisals/reviews for the last year except ad hoc informal meetings with certain staff – missing a few people out
 - Has manager training booked in a session next Tuesday 24/08/2021
 - Unsure of the amount of paperwork (computer work needed) as it will add to work load
 - We discussed that mandatory meetings would only be once every 6 months and held in a group setting so not necessarily as much work as he was expecting – still some pushback due to busy workload of the team

- Unsure of how valuable it will be for some people as some like to be left alone. Can't see some of the team wanting to raise development concerns in a group setting
- Encouraged to raise these concerns during the training as L&D have guidance for this (also valuable for them to hear the feedback)
- Discussed goal setting with the team and whether this is helpful with their jobs. PM feels that it could be if they are looking to learn new skills. I suggested that he looks at behaviours as well with certain team members – eg. supervisors learning to delegate effectively
- Discussed wellness and the potential to support the team more effectively which hasn't been as easy during the past year. PM's anxiety around dealing with the mental health of his team, not wanting to say the wrong thing
- Request from PM for me to join a session to support although I acknowledge that the team may not be as open with HR present
- Offer of follow up after the training to discuss action plan
- Thinks that this training should be offered to high potential "next generation" of leadership for their own development

EV23

Meeting Notes

Gareth Howells (Facilities)

18/08/2021

Discussion Points:

- **Awareness of new Performance & Wellbeing Plan**
 - **Completion of training for P&W plan**
 - **Attitude towards the new P&W plan**
 - **Confidence in starting the P&W Appraisal process**
 - **Any support that I/HR can offer**
-
- Attended training session in July but no opportunity to act on this during summer holidays
 - Thinks the structure (every 6 months in groups) is supportive to his team's workload but he will adjust accordingly to support certain people.
 - Informal reviews have been happening with all team members but often more a discussion of current work rather than development. Hard in this area as many aren't looking to develop – little incentive to develop
 - Encouraged GH to think about these as opportunities to communicate and encourage this within the team – wellbeing a consideration
 - Not keen on the online plan element and he feels it won't be used by most of his teams
 - Will share feedback over time with HR.

EV24

Meeting Notes

Dean Philpin (Finance)

23/08/2021

Discussion Points:

- **Awareness of new Performance & Wellbeing Plan**
 - **Completion of training for P&W plan**
 - **Attitude towards the new P&W plan**
 - **Confidence in starting the P&W Appraisal process**
 - **Any support that I/HR can offer**
-
- Yes aware of the new plan and completed training at beginning of August.
 - Has held a couple of sessions with accountants and went well although needs to follow up with them using the online plan.
 - Happy with delivering on this as it's quite informal on the whole with the addition of a follow up task.
 - Likes the framework as it supports more remote communication. DP admits that this hasn't been consistent over the last 18 months.
 - Meeting every month with each employee is challenging. We discussed that these should be quick and more feedback/catch ups but this is still quite frequent for this to happen consistently.
 - DP can foresee certain individuals getting more time with him for development while others will continue to keep their head down.
 - Busy times of the year (budget closure) will be tricky for him to do this.
 - DP would like some support from HR in the sorts of goals he should be setting with employees. We talked about behaviours and competencies and what he is expecting from each role.
 - Because they are meeting each month I recommended he listen more than direct as objectives should come from the conversation rather than him having to come up with something for everyone in his team to achieve each month without their input.

EV25

From: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>
Sent: 25 August 2021 12:44
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Recap from Performance Training

In tomorrow so will see you in the hr office. Training was good.

Phil

Phil Marchant
Goruchwylydd Ymatebol
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Ffôn symudol – 07836768212
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Find us on [Facebook!](#) | Gallwch ddod o hyd i ni ar [Facebook!](#)



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 25 August 2021 10:26
To: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>
Subject: Recap from Performance Training

Hi Phil,

I wanted to follow up to see how your training session went yesterday with Learning and Development for the new performance management plan.

I'm in Thornton tomorrow morning if you wanted to catch up then.

Thanks,
Duncan

Duncan Hook
Employee Relations Adviser
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EV26

Meeting Notes: Phil Marchant

26/08/2021

-Training was good. Couldn't fault Ruth who delivered it and the new plan sounds like it will work.

- PM referenced that he plans to retire in 18 months (along with other managers in Building Maintenance) and so doesn't want to make long term plans with anyone. He asked whether it would be possible for this training could better reflect the succession planning going on within the service
- I'm not a qualified bricklayer even though that's what I did but I do have qualifications in management so with the high potential staff I want to focus on them and their development.
- Some of the high potential staff are Grade 6 so wouldn't qualify for one on one performance appraisal but I advised to make exceptions in their case but would need to have the option for others at the same grade to have the same
- PM talked about how informal performance reviews have been very informal in the past but can see the value in a consistent system
- Feedback for L&D to see whether it would be possible for some supervisors to also go through the training as they would benefit from it – I pointed out that this would be helpful from an awareness standpoint but unlikely to be a priority as they won't be delivering appraisals in the plan
- Succession planning is the current priority in BM as the old guard is moving on
- Also still unsure of how beneficial this will be to lower grade roles – can picture himself sitting in a circle with people not talking and him doing all the heavy lifting but he is definitely open to trying it
- Will plan a session in the next two weeks with a group and let me know how it goes

EV27

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>
Sent: 16 March 2021 08:10
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: [REDACTED] Performance

Hi Duncan

Yes definitely please organise a meeting. It's quite concerning that this wasn't spotted earlier if it goes back 3 years. I know there have been some other concerns regarding his attendance in the past so it's not the first time his name has come up.

You're right this will be informal at first and I can outline a plan for Dean to set with [REDACTED] so that he is aware of changes that need to take place. As this is your first performance case here would you like to support me on this one? We can work out a plan after the meeting with the managers.

Jo

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 15 March 2021 17:03
To: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>
Subject: [REDACTED] Performance

Afternoon Jo,

I just had my monthly meeting with Dean Moraity and he raised some concerns about one of the Senior Social Workers in the team, [REDACTED]. He reported that there have been a number of issues with the work being completed by [REDACTED]

including the following:

- Missing records of Looked After Children visits – some up to 3 years ago
- Missing paperwork of statutory action and reports – some up to 3 years ago
- Multiple situations where supervision notes haven't been recorded or filed
- Missed opportunities during supervision to follow up on development concerns with these social workers

Understandably this was a shock to Dean and Kelly as [REDACTED] is otherwise good in his role but is missing this key administrative function. They both feel that a formal process needs to start with Kim to improve his performance. I have explained that we would normally start informally to ensure a fair process.

Excuse all of this being in an email but I wanted to document everything that was raised here. If I set up a meeting with Dean and Kelly would you be available to join? While I dealt with a couple at Apple I haven't worked with a performance case like this while at PCC so it would be good to have your support.

Thanks for your help,
Duncan

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Duncan.Hook@pembrokeshire.gov.uk

EV28

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 15 March 2021 10:19
To: Moraity, Dean <dean.moraity@pembrokeshire.gov.uk>
Subject: RE: [REDACTED] Performance

Hi Dean,

Yes please send over an Occupational Health referral and I'll get the ball rolling. Any support we can offer would be helpful in getting [REDACTED] back on track.

Apologies I hadn't realised that the issues raised dated back so far but yes please bring any information you have as it would be helpful to see what support and conversation you have already offered.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall

Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Moraity, Dean
Sent: 15 March 2021 10:03
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: [REDACTED] Performance

Thanks Duncan,

I have supervision records dating back to December 2019 when concerns were first raised and the actions taken then if that's appropriate to bring.

I'm also concerned about [REDACTED]'s health as he is well aware of how behind he is and the stress this is causing. I would like to refer him to Occupational Health if possible for solutions that would be beneficial.

Thanks,

Dean Moraity
Assistant Team Manager / Rheolwr Tim Cynorthwyol
Corporate Parenting Team / Tim Rhianta Corfforaethol
Pembrokeshire County Council / Cyngor Sir Benfro
Argyle Street
Pembroke Dock / Doc Penfro
SA72 6HL

Tel / Ffon: 01437 776409
Mob / Symudol: 07810 151758
Email: dean.moraity@pembrokeshire.gov.uk

-----Original Appointment-----

From: Hook, Duncan
Sent: 15 March 2021 09:19
To: Moraity, Dean; Noble, Kelly; Pugh-Davies, Joanne
Subject: [REDACTED] Performance
When: 19 March 2021 10:30-11:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.
Where: Microsoft Teams Meeting

Hi both,

I hope the above time is suitable for us to meet with Jo to discuss the concerns raised by Dean re. [REDACTED]'s performance.

Please bring any relevant information to the meeting so that we can get the full picture and determine next steps.

Thanks,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest

EV29

From: Moraity, Dean <dean.moraity@pembrokeshire.gov.uk>
Sent: 19 March 2021 15:44
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: [REDACTED] capability follow up

Thanks Duncan

Kelly and I had a chat too and the plan is to meet informally on the 26th to outline expectations and then we'll start the weekly supervisions with [REDACTED] to see how he's improving and catching up with the missing work.

Thanks,

Dean Moraity
Assistant Team Manager / Rheolwr Tim Cynorthwyol
Corporate Parenting Team / Tim Rhianta Corfforaethol
Pembrokeshire County Council / Cyngor Sir Benfro
Argyle Street
Pembroke Dock / Doc Penfro
SA72 6HL
Tel / Ffon: 01437 776409
Mob / Symudol: 07810 151758
Email: dean.moraity@pembrokeshire.gov.uk

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 19 March 2021 15:17
To: Moraity, Dean <dean.moraity@pembrokeshire.gov.uk>
Subject: [REDACTED] capability follow up

Hi Dean,

Following the meeting I chatted with Jo and she agreed that once your plan is in place I will recap her from our monthly meetings on how [REDACTED] is responding to the plan in place. Given the informal support already offered we're giving him a further three months with a clear structure in place to see how he responds.

I've submitted the Occ Health referral this afternoon so we should know then if any further support is required. As Jo discussed with you, this is now a capability concern as [REDACTED] is citing dyslexia as the root cause of his inability to complete this work which as you say is non-negotiable in the role he is in. If we can get some recommendations from OH then I think we can monitor how these are impacting his work.

I'll speak with you once I get this OH report back but let me know in the meantime if you need anything.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

EV30

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Sent: 17 June 2021 13:53

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: [REDACTED] Capability

Thanks Duncan

Please give Dean a call and talk him through the report using the format we use for investigation reports. If you can support him refining this and clarifying the recommendations that would be great.

Jo

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 17 June 2021 13:46

To: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Subject: RE: [REDACTED] Capability

Thanks Jo, yes that sounds like the best plan for me to be able to sit in on the meeting.

Please let me know if there's more support I can offer.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Sent: 17 June 2021 13:41

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: [REDACTED] Capability

Hi Duncan

I met with Kelly and Dean today and we've agreed to move forward with the disciplinary process. Dean is pulling together a report based on the chronology from late 2019 through the supervisions, targets set and up to now as evidence.

As this is your first one I'm happy to provide the HR support but would you be happy to notetake so you can see the process?

Jo

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Sent: 15 June 2021 16:33

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: [REDACTED] Capability

Thanks Duncan

I've got a catch up with Kelly planned for Thursday so I will discuss this then. I think Dean's probably right but I'll want to see the supervision notes first. Could you send me anything that Dean has provided please?

Jo

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 15 June 2021 16:19
To: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>
Subject: [REDACTED] Capability

Hi Jo, I hope you're well.

I just had a my monthly catch up with Dean and amongst other concerns raised (which we can cover later), we discussed the latest update regarding [REDACTED]'s performance improvement plan. He feels strongly that we need to move to a formal process now as he can see very little improvement despite the measures put in place to help him. The main points raised:

- The support offered by blocking out Mondays as admin days and reducing caseload to allow this are being ignored. [REDACTED] says that he hates being stuck at a computer and would rather be getting out there helping people – there is a concern here that he just doesn't get the impact of what he's doing wrong
- We have provided Dragon Software to enable him to dictate his work because of his dyslexia but he is not committing to using – I'm aware of the cost of this as I organised with IT and it was about £500 so annoying this

isn't being used

- [REDACTED] in the business unit has been given to [REDACTED] on Mondays to support his recording of information from over the past few years. Dean can see the amount of work that they have done is dwarfing the input [REDACTED] has offered with little support from [REDACTED].
- The bad habits have continued into the new observations/meetings since he was put on the plan. He is still not completing records so the problem persists and the workload is building up.

Dean has notes from every supervision and meeting with [REDACTED]. I don't know if you want to meet as a group again but please advise.

Thanks,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

EV31

-----Original Appointment-----

From: Hook, Duncan

Sent: 31 March 2021 17:03

To: Pawlett, Gail

Subject: Staff sickness when on probation

When: 02 April 2021 14:00-14:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

No problem Gail,

I've put in a meeting for Friday for us to discuss. If they have already been informed that probation would be extended then the format of the meeting can be slightly different although a formal meeting with a written outcome will ensure there is no room for doubt that improvement is expected over the three month extension.

I hope this time works for you to go over the concerns.

Thanks,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

SA61 1TP

Duncan.Hook@pembrokeshire.gov.uk

Microsoft Teams meeting

Join on your computer or mobile app

[Click here to join the meeting](#)

[Learn More](#) | [Meeting options](#)

From: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>

Sent: 31 March 2021 16:27

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: Staff sickness when on probation

Thank you for the prompt response Duncan

There are actually two staff members who are at probation end on the 15th of April who I have concerns about. It goes

wider than absence as their performance is also concerning although we are giving the benefit of the doubt that this is due to the winter lockdown and want to give them the opportunity to improve.

The staff have both been informally told that probation would be extended as I didn't realise that the formal meeting was required. Some support in a meeting would be helpful if you are available.

Many Thanks

Gail

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 31 March 2021 16:18

To: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>

Subject: RE: Staff sickness when on probation

Hi Gail, thanks for your email.

If you have decided to extend that's fine as I understand that covid will have impacted their experience over the first few months. I would say that if you are due to have a formal probation review then we should discuss absence and setting an absence target at this stage. This is very high absence and so it is concerning but it depends what expectation has already been set and whether their induction was impacted.

When is their probation due to end? Do you have a formal meeting planned already as I would be happy to support if there are wider concerns you wish to address.

Kind regards,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

Haverfordwest

SA61 1TP

Duncan.Hook@pembrokeshire.gov.uk

From: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>

Sent: 31 March 2021 15:53

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Cc: Rees, Michelle (FIT) <Michelle.Rees@pembrokeshire.gov.uk>; Shinner, Sarah

<sarah.shinner@pembrokeshire.gov.uk>; Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Subject: Staff sickness when on probation

Hi Duncan

Please can you advise.

I have a member of staff who is on probation. We are planning to extend the probation for 3 months, due to covid and not being able to give them all the training we usually give to new staff in the first 6 months.

However, I have a probationer who will have had 4 different illnesses with the first 6 months, which up to tomorrow will

take his sickness up to 16 days in under 6 months.

Please can you give me some guidance on this situation?

Many Thanks

Gail

EV32

From: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>
Sent: 02 April 2021 16:33
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Summary and meeting invite letters

Thank you for your support Duncan

I will hand these letters out on Monday and let you know if there are any other queries.

As you say, thank god for supervisions as they save us in situations like this where we need to review backwards. Thank you for running me through the agenda which I will flesh out and prepare before the meetings.

Many Thanks

Gail

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 02 April 2021 16:14
To: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>
Subject: Summary and meeting invite letters

Hi Gail, thanks for the meeting today.

Please find attached invites for both Child Care Support Workers. Please review, sign and hand to the two of them at least a week before the meeting.

Before the meeting, as discussed, please gather all supervision notes you have for the past few months. It is essential you keep a good record of these for probationers as this will help evidence any decisions you make at a later stage. I recognise that for each of them you have concerns and are raising the below improvement points:

██████████ – review 13th April

- Address the missing records kept from observations. Currently these are filed incorrectly or not at all.
- Improve detail in observations which are currently not sufficient for presenting in court
- Increased assertive behaviour – currently dealing with all parents is difficult and while you recognise it takes time to learn these skills this is currently making it difficult to assign cases
- Improvement expected in efficiency. Amanda has a small caseload which shouldn't give her much trouble but she has admitted to working most evenings and even some weekends to complete what she can't during office hours
- Improve her initiative and independence in finding work and not waiting to be asked

██████████ – review 14th April

- Improvement in sickness absence levels. Our corporate target is 10 per rolling year while ██████████ is already at 14 (we don't count weekends) for minor ailments over the first 6 months
- Improve detail in observations which are currently not sufficient for presenting in court
- Improve initiative and independence in finding work and not waiting to be asked

I will book 1DM2 for both meetings in County Hall. Because of covid restrictions you will need to request access; please let me know if you need guidance on how to do this. For the two Child Care Support Workers we can meet them at reception beforehand.

Please let me know if you have any questions.

Kind regards,
Duncan

Date - ~~02/04/2021~~ 02/04/2021
 Your ref - ~~Ex 01437 762 682~~ [REDACTED]
 My ref - ~~Ex 01437 762 682~~ 102341
 Telephone - ~~01437 762 682~~ 01437 762 682
 Email - ~~Gail.Pawlett@pembrokeshire.gov.uk~~ Gail.Pawlett@pembrokeshire.gov.uk

www.pembrokeshire.gov.uk
www.sir-benfro.gov.uk

[REDACTED]
 [REDACTED]
 [REDACTED]
 [REDACTED]
 [REDACTED]



Pembrokeshire County Council
 Cyngor Sir Penfro

RICHARD BROWN, B.Sc. (Hons), CIPD, HCIMVP
 Interim Chief Executive / ~~Prif Wleidyddwr Dros Dda~~

CATHERINE EVANS, B.A. (Hons) MA LLM HCIMVP
 Chief Human Resources Officer
~~Prif Wleidyddwr Dros Dda~~

Pembrokeshire County Council,
 County Hall, HAVERFORDWEST,
 Pembrokeshire, SA61 1TP

~~Cyngor Sir Penfro~~
 Neuadd y Sir, HWYLFORDD,
 Sir ~~Penfro~~, SA61 1TP

Telephone / ~~01437 764551~~ 01437 764551

Please ask for
~~Os gwelwch yn dda gofynnwch am~~

Gail Pawlett

Dear [REDACTED]

Probation Review Meeting

I am writing to inform you that you are requested to attend a probation review meeting on **Tuesday 13th of April 2021, 09:30am at Room 1DM2 in County Hall, Haverfordwest**. I will be accompanied by ~~Duncan Hook, Employee Relations Adviser~~.

The purpose of the meeting will be to review your overall performance since you started on 02/11/2020. You have already been informed that your probation is to be extended but I would like to meet with you formally to set expectations for your performance for the next three months. Please bring along any documentation that you feel is relevant.

You are entitled, if you wish, to be accompanied at the meeting by a work colleague or an accredited trade union representative. Please inform me prior to the meeting who you intend to accompany you. If this meeting time is inconvenient and does not allow you enough time to arrange accompaniment, please let me know and we will re-schedule.

Yours sincerely,

Gail Pawlett
 Contact Centre Co-ordinator

EV34

From: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>
Sent: 13 April 2021 15:43
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: [REDACTED] Probation Outcome Letter

Thank you Duncan for your support today. If I think of anything I will ask you tomorrow.

Many thanks

Gail

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 13 April 2021 15:21
To: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>
Subject: [REDACTED] Probation Outcome Letter

Hi Gail,

Following the meeting today with [REDACTED] and the expectations outlined in the meeting, please find the draft outcome letter. Please read through and make any amendments you feel are required before signing and issuing to [REDACTED]. I also attach the minutes I took during the meeting for [REDACTED]'s file.

As you have committed to doubling your monthly supervision meetings to every two weeks, I would recommend measuring against these expectations at each meeting and clarifying where Amanda needs to focus. This is an opportunity for her to work towards the required standard. If you then compile this together you have your evidence for whatever outcome is decided at the next probation review.

Please let me know if you have any questions and I'll see you tomorrow for our other meeting.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

Date • Dyddiad 13/04/2021
 Your ref • Eich cyfeirnod [REDACTED]
 My ref • Eiddo 102341
 Telephone • Ffôn 01437 762 682
 Email • E-bost Gail.Pawlett@pembrokeshire.gov.uk
 www.pembrokeshire.gov.uk
 www.sir-benfro.gov.uk



Pembrokeshire County Council
 Cynghor Sir Benfro

RICHARD BROWN, BA (Hons) MA LLM MCIPD
 Interim Chief Executive / Prif Weithwngwr Dros Gylch

CATHERINE EVANS, BA (Hons) MA LLM MCIPD
 Chief Human Resources Officer
 Prif Swyddwr Personol Dros Gylch

Pembrokeshire County Council,
 County Hall, HAVERFORDWEST,
 Pembrokeshire, SA61 1TP

Cynghor Sir Benfro,
 Neuadd y Sir, HWLFFORDD,
 Sir Benfro, SA61 1TP

Telephone / Ffôn 01437 764551

Please ask for
 Os gofynnwch yn dda gofynnwch am

Gail Pawlett

Dear [REDACTED],

OUTCOME OF PROBATION REVIEW MEETING

I am writing to confirm the outcome of our discussions at the probation review meeting that you attended on 13/04/2021 with myself and Duncan Hook from HR.

I explained that the purpose of this meeting was to review your performance since you started your employment with us on 02/11/2021 and confirm the extension for the period of three months. This extension comes with some clear expectations for improvement, the key objectives being:

- To complete the required work to the necessary standard requested as in the Job Description including:
 - o Keeping accurate administrative records of children's data
 - o Improved detail in observations which are official records of contact meetings
 - o Improvements in using initiative and independence in picking up work and determining when work is complete
 - o Improved assertiveness in working with contacts
- To stop working excessive hours at home in order to complete observations during reduced levels of contact

During the probation review meeting, we specifically discussed the issues that had been raised:

- Your ability to carry out work independently, particularly in written observations which lack detail and clarity

We welcome correspondence in Welsh and English, and will respond within a maximum of 15 working days. We will respond in the language in which the correspondence is received (unless you ask us to do otherwise). *Byddwn yn croeso i chi yrru o'r Gymraeg a'r Saesneg a byddwn yn ymateb o'r ynnod awrall fan bellaf. Byddwn yn ymateb yn yr un iaith â'r ohebiaeth a ddertyniwyd (oni bai eich bod chi'n gofyn i ni yrru yn wahanol).*

or a copy in large print, easy-read, Braille, audio, or an alternative language, please contact Pembrokeshire County Council on the number above. *Os am gopi mewn print mawr, fformat hawdd ei ddarllen, Braille, sain neu mewn iaith arall, cyswllt i'r Cynghor Sir Benfro a'r rhif uchod.*

- Lack of confidence and assertiveness in working with difficult contacts and managing situations of minor conflict
- Your ability to perform in various administrative functions of the role, specifically in keeping accurate records of children
- Poor management of your workload and priorities with resulting poor work/life balance including regular working outside of office hours which you have not addressed

We will continue to review your performance during regular supervision meetings and we will then formally review your probation extension in the week beginning 12/07/2021.

Yours sincerely,

Gail Pawlett
 Contact Centre Co-ordinator

EV36

From: Duncan Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 30 June 2021 11:08

To: Pawlett, Gail <Gail.Pawlett@pembrokeshire.gov.uk>

Subject: Probation Review

Hi Gail,

Thanks for calling today to discuss the concerns regarding the two Child Care Support Workers currently on extended probation.

I acknowledge your concerns first that neither have improved to a satisfactory level when viewed against the expectations laid out in our meetings in April and that there are now additional concerns regarding potential GDPR risks.

As I have mentioned before please ensure you have documented the conversations along the way as evidence. Although I'm aware that you are unhappy with their progress I want to ensure the meeting we hold is fair and they have an opportunity to answer your questions in showing how they have improved.

We are due to hold the probation review the week beginning 12th of July so I will organise a date for us to hold both meetings in the same location in County Hall.

Thanks again,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

County Hall

EV37

From: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Sent: 14 July 2021 14:26

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: Probation Review Outcomes

Thank you for the summary Duncan

You're right failed probation is quite uncommon as recruitment has been so tight many managers will work to improve the staff they have and it is only in situations like this these that formal probation reviews are required. You'll find it's more common in Bev's areas like waste as behaviours are easily picked up by the teams.

I think Learning and Development have been trying to replicate the supervision structure in other areas with the new PM strategy. It would be good to speak with them about the benefits of this for probation as well.

Jo

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Sent: 14 July 2021 14:26

To: Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>

Subject: Probation Review Outcomes

Hi Jo, I hope you're well.

I just wanted to give you an update of the two probation meetings held today with Gail Pawlett. Both Childcare Support Workers failed their probation and their contracts terminated from today. They may appeal in which case Michelle Rees will hear it.

In terms of this process, I was thinking about ways that we could improve the probation process. It seems like it is fairly rare that probation is failed as this is the first I've encountered in 18 months. Comparatively at Apple we dealt with them quite regularly and so there was a set process that every line manager followed of regular contact during the probation process.

In this instance we were in a good position as social workers have monthly supervision which supports regular communication regarding performance so evidencing the feedback has been given. In many of our areas this is nowhere near as consistent. I was thinking about facilities, building maintenance etc. I don't think they do anything like this during probation which could be a challenge.

I wonder if this has come up at any point in discussions with Cathy as across the organisation this doesn't feel consistent. I will speak with Gareth in facilities and see what he does currently and whether these recommendations would be appropriate.

I'll keep you posted about appeals.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council

EV38

From: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>
Sent: 07 September 2021 08:43
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE:

thanks

Phil

Phil Marchant
Goruchwylydd Ymatebol
Uned 25 Thornton
Ffôn – 01437 77 5924
Ffôn symudol – 07836768212
E-bost phil.marchant@pembrokeshire.gov.uk

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From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 07 September 2021 08:21
To: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>
Subject: RE:

Morning Phil,

Yes I'll be in Thornton tomorrow for the morning if you're free? I'll block out 10-11 as usual if you're free to meet then.

Good to hear you've held a group session already. I'll be interested to how it went.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
Human Resources
Pembrokeshire County Council
County Hall
Haverfordwest
SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

From: Marchant, Phil (Maintenance) <Phil.Marchant@pembrokeshire.gov.uk>

Sent: 07 September 2021 08:17

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject:

Good morning

We had the first group session for the new appraisal system today. Are you around tomorrow to discuss?

Phil

Phil Marchant
Goruchwyllydd Ymatebol
Uned 25 Thornton
Ffôn – 01437 77 5924
Ffôn symudol – 07836768212
E-bost phil.marchant@pembrokeshire.gov.uk

Find us on [Facebook!](#) | Gallwch ddod o hyd i ni ar [Facebook!](#)



EV39

From: Philpin, Dean <Dean.philpin@pembrokeshire.gov.uk>

Sent: 07 September 2021 17:12

To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>

Subject: RE: Performance Review check in

Hi Duncan,

Thanks for getting in touch, I hope you had a good summer!

Yes I have held a further 5 sessions since we spoke last. I took your advice to make them more brief and employee led which I think will support me being able to fit these in every month. I have formulated a plan to see everyone for a 'check-in' each month which they write up and I sign off. That's the only way I can currently see this working but I believe this will become simpler once we're all working together in person.

In terms of impact, I agree it is too early to say but this has put the spotlight on the contact time I am having with my direct reports. As I mentioned before, I will admit that I was concerned that certain team members slip through the net if the process wasn't consistent and this plan will ensure this contact is happening. I can foresee this having a benefit for sickness levels and motivation in the team.

We can discuss more at our next catch up.

Best wishes
Dean

Dean Philpin
Finance Manager – Education & Schools / Development
Pembrokeshire County Council
County Hall / Neuadd Y Sir
Haverfordwest / Hwlfordd
Pembrokeshire / Sir Penfro
SA61 1TP
Tel / Ffon: 01437 776341

Stay Safe 

From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 07 September 2021 14:01
To: Philpin, Dean <Dean.philpin@pembrokeshire.gov.uk>
Subject: Performance Review check in

Good afternoon Dean, I hope this finds you well.

I wondered how you've been getting on since we spoke last regarding the new performance management plan. It's been a couple of weeks and I know you had some sessions planned.

Have you had any more thoughts about how this is going to fit into your schedule and the time investment? It may be too early to say but I wondered if you have had any good results come from the sessions so far.

Look forward to hearing from you.

Kind regards,
Duncan

Duncan Hook
Employee Relations Adviser
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Pembrokeshire County Council
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SA61 1TP
Duncan.Hook@pembrokeshire.gov.uk

EV40

Meeting Notes

Phil Marchant (Building Maintenance)

15/09/2021

- For services who are not working remotely, having groups in one space can be logistically challenging during covid – this won't be an issue in the future
- For Grade 4 roles this is helpful, good to get everyone in a room and talking openly about the challenges they're having and sharing ideas to improve

- A few grumpy faces in the room but to be expected – think they still got something out of it even if just social/team building, On the whole the team were open to it
- Grade 5s and above I feel like the group sessions aren't appropriate – not an opportunity to talk much about career progression so I feel like I will need to follow up with them separately
- Succession planning again needs to be on an individual level and more than every 6 months so this will require some planning
- Definite improvement over informal process they had been using before
- Hasn't engaged fully with the online component yet – DH advises that the team are responsible for their own plan – challenging with lack of IT facilities for the team to use in Thornton but definitely possible
- DH explain that the online component is important in tracking objectives and learning without copious additional paperwork – very much team led so he only needs to lend an ear and advise when required
- PM would like more opportunity to customise this for his team – DH recommends that PM thinks about specifics and feed back to L&D
- DH to take feedback so far to L&D

EV41

Send	Location	Microsoft Teams Meeting
	When	16 September 2021 15:00-15:30
	From	Hook, Duncan

-----Original Appointment-----

From: Hook, Duncan

Sent: 15 September 2021 15:04

To: Watkins, Julie

Subject: Performance & Wellbeing Plan Feedback

When: 16 September 2021 15:00-15:30 (UTC+00:00) Dublin, Edinburgh, Lisbon, London.

Where: Microsoft Teams Meeting

Hi Julie, I hope you're well.

Would you be free at the above time to go through some feedback I've had from managers and teams so far for the new Performance and Wellbeing Plan? I also have a few recommendations if you're open to me sharing these?

Apologies that it's quite short notice but I saw you have some time tomorrow afternoon and went for it!

Thanks for your help,
Duncan

Duncan Hook

Employee Relations Adviser

Human Resources

Pembrokeshire County Council

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Meeting Notes - 16/09/2021

Julie Watkins (Learning and Development)

Feedback and Recommendations – Performance & Wellbeing Plan

Manager Feedback:

- Overall positive response for the plan and from the training
- Managers like having a structure and expectation of what they should be doing as it has been ad hoc/informal for a number of years
- The format of monthly meetings for many roles will create a lot of work for certain managers if they are not approaching this as a 'little and often' practice – Finance manager I met was initially trying to pack in an annual review level of detail into each meeting
- Managers like the customisation for their sector of the authority
- Succession planning a concern – Building Maintenance would like 'high potentials' to have an opportunity to complete this training
- Covid recognised as a challenge for in person group sessions but will hopefully alleviate over time
- See this as a benefit to connecting with the team particularly while working remotely
- Managers optimistic that this will help with wellbeing concerns and reduce sickness absence
- It would be interesting to know how take up has been so far and any other stats

Recommendations:

- Consider reducing the grade threshold for group sessions. Many of our Grade 5 roles still require individuals to engage in project work and use their own initiative so would benefit from one on one sessions
- More flexibility for development plans – perhaps allowing managers or employees to opt into a plan that works for them and their role, workload etc. For example, some vocational roles suit a 6 month review where others would benefit from quarterly
- Some additional training required for some managers to understand how to hold these appraisal/review sessions – some are trying to do too much per session and not allowing the employee to speak for themselves making it more work for the manager and more likely to drop off the cycle of holding sessions

EV43

From: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Sent: 16 September 2021 17:02
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Results from Performance & Wellbeing

Just checked on that number with Dean and it's now 118.

Regards/Cofion

Julie



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 16 September 2021 16:40
To: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Subject: RE: Results from Performance & Wellbeing

That's great, thanks Julie.

Kind regards,
Duncan

Duncan Hook
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From: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Sent: 16 September 2021 16:22
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: Results from Performance & Wellbeing Plan

Hi Duncan,

Following your query in the meeting earlier, I've had a look into how the rollout is going currently.

We've had 112 managers attend the training session so far. I'll ask Joy to run a report on POD to find out how many people have completed the online training as well.

I'm not sure if we are able to tell how many plans have been set up but I'll ask Joy about that as well.

As we've said, it's early days so we may not see fruits from this work until later in the year but I will continue to share what I can.

Regards/Cofion

Julie



EV44

From: Allen, Julia <Julia.Allen@pembrokeshire.gov.uk>
Sent: 17 September 2021 11:20
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>; Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>
Subject: RE: HR Support for Performance Management

Hi Duncan, thanks for this.

Absolutely bring this to the next meeting, we should have a discussion about it and I think the recommendations are pertinent.

Julia

Julia Allen
HR Manager

07407344783

julia.allen@pembrokeshire.gov.uk



<https://ess.pembrokeshire.gov.uk/policy/WAFE.docx>



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 17 September 2021 10:46
To: Allen, Julia <Julia.Allen@pembrokeshire.gov.uk>; Pugh-Davies, Joanne <Joanne.Pugh-Davies@pembrokeshire.gov.uk>
Subject: HR Support for Performance Management

Hi both,

As you know I've been spending some time with Learning and Development learning about the new Performance & Wellbeing Plan introduced earlier this year. I have also been working with some of the managers I support to gauge how it's been received by them and any support they need.

After speaking with them and my other colleagues in HR I can see that we have some opportunities to contribute more as a wider HR team to the initiative as currently it seems L&D are the only ones banging this drum. I'm concerned that with Victoria leaving this will mean that communication falls behind and the launch becomes a flop.

My recommendations for additional HR support are:

- Everyone in the team to attend the manager training and complete all e-learning
- For us to start using the framework on a monthly basis. We already have informal development but using the online plan will help ensure we have a record of what we're all working on.
- Talk to managers regularly about how they are integrating this into their work currently:

- How do they schedule their sessions to ensure it doesn't take over?
- Are they keeping the sessions brief but regular (monthly)?
- Are teams using the online platform?
- Sharing best practices with each other and with managers.
- Sharing feedback with L&D on what we're hearing so changes can be implemented before the full launch next year.

I'd like to talk about this more at our next team meeting as I think we all should have a stake in this. I'll get in touch with Cathy to check that she's ok with me doing this as I know she is planning a few changes and this may be one.

Thanks,
Duncan

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Duncan.Hook@pembrokeshire.gov.uk

EV45

From: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Sent: 17 September 2021 13:49
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: RE: Performance & Wellbeing Plan

That's great, thanks Duncan. 😊

Regards/Cofion

Julie



From: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Sent: 17 September 2021 13:47
To: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Subject: RE: Performance & Wellbeing Plan

Hi Julie, thanks so much for this.

I've been having some good conversations with managers and promoting with my colleagues so I hope this helps.

Thanks again,

Duncan Hook

Employee Relations Adviser
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Duncan.Hook@pembrokeshire.gov.uk

From: Watkins, Julie <julie.watkins@pembrokeshire.gov.uk>
Sent: 17 September 2021 13:44
To: Hook, Duncan <Duncan.Hook@pembrokeshire.gov.uk>
Subject: Performance & Wellbeing Plan

Hi Duncan

A few more stats below for you.

POD training

341 people have completed

Corporate Plans

11 Approved
12 Pending Approval
15 Draft

Vocational Plans (these are harder to track as they only show once both manager and employee have completed them)

2 Completed

Learning Plan Templates

4 Approved
2 Pending Approval
10 Draft

Let me know if you need any further info.

Regards/Cofion

Julie

Julie Watkins

Learning & Organisational Development Advisor
Pembrokeshire County Council
Pembrokeshire Archive
Prendergast
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SA61 2PE

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