

Qualification: CIPD Diploma in Applied Human Resources

Module Name: Contributing to Improving Organisational Performance

Word Count: 2,127

Student Name: Elinor Beynon

Student Number: 2016038

CIPD Membership Number: 57493068

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

Signed: 

Date: 20th September 2021

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Evidence Matrix

Candidate name: Elinor Beynon				CIPD Membership/registration No.: 57493068		
Qualification title: CIPD Diploma in Applied Human Resources (Level 5)				Unique Learner No. (ULN): 2016038		
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:

E. Baynon

Date:

20th September 2021

LO1. Explain performance management policies and processes in the organisation and the roles and responsibilities of those involved in them.

Swansea Council has a Performance Management policy (EV1) which outlines the process of performance management and the roles and responsibilities of those involved in them.

The types of performance management activities that Swansea Council has includes job and person specifications and role profiles, performance appraisal and development review meetings, regular one-to-ones and three and six month performance development reviews.

The policy explains that performance management involves ensuring employees know what is expected of them, monitoring their performance and providing support, and reviewing and amending objectives when needed. The policy explains that performance management is everyone's responsibility. There needs to be a shared understanding of what is to be achieved and how to get there. Performance management is both robust and inclusive.

The Head of HR is responsible for maintaining and reviewing the policy. Managers are responsible for managing the performance of their employees, setting targets/objectives, appraising their employees at least once a year, ensuring training and development is available to those who need it, having regular one-to-ones with their employees and addressing poor performance. Employees are responsible for taking an active role in target setting and reviewing their own performance, attending necessary learning and development opportunities and managing their own professional development. HR is responsible for providing advice and guidance to managers, ensuring appropriate training and development programmes are available and monitoring and reporting on the implementation of these training and development programmes.

Swansea Council has a standard job description/person specification (EV2) template which must be used for all job roles. The job description includes the purpose of the post, what the post holder will be responsible for and the job working circumstances. The person specification explains what education, qualifications, training, skills, experience, competencies and abilities for the job role.

Performance management starts at the recruitment process. A shortlisting criteria template (EV3) is used to shortlist applicants for interviewing to make sure they meet the minimum criteria for the role. Once an applicant has been recruited, they must carry out the mandatory Corporate Induction Training (EV4) which is an e-learning course (EV5). This course explains Swansea Council's vision and how everyone employee plays a role in achieving this vision. It explains what is expected from the employee so they can understand how they play a part in the goals of the organisation. Reminders have been sent to managers to make sure new starters are completing this mandatory training (EV6).

Swansea Council's Probation Policy (EV7) explains how the probation period is there to be used as a framework to help managers monitor new employee's progress and to enable managers to deal with any shortcomings in the new employee's progress. It explains how good performance should be praised and it is used as a way for new employees to settle into their new working environment. The manager is responsible for carrying out the probation process and they must give clear guidance on standards of work and conduct from the outset. If there are any apparent issues, the manager and employee should decide jointly what action might help to resolve them. If agreement cannot be reached, the matter is then referred to HR to mediate.

Swansea Council follows the advice of ACAS during induction and the probation period (ACAS, 2021). The Equality Act 2010 is also followed during shortlisting applicants for interview, induction and the probation period. The shortlisting form (EV3) includes a box to tick if an applicant is disabled. This means that they will be guaranteed an interview as long as they meet the minimum criteria for the job role. Within the Person Specification (EV2) there is a section called 'Commitment to Equal Opportunities' where it is explained that all activities must be undertaken in accordance with the Equality Act 2010 and that all managers and employees must be aware of the Equality Act.

References

ACAS (2021) *Checklist for induction of new staff*. Available at: <https://www.acas.org.uk/checklist-for-induction-of-new-staff> (Accessed: 5 September 2021)

Equality Act 2010, c. 15. Available at: <https://www.legislation.gov.uk/ukpga/2010/15/section/6> (Accessed: 31 March 2021).

Evidence

EV1



Employee Performance Management Policy

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Job Description

Directorate:		Resources	
Service Area & Section:			
Unit Manager:			
Post Title:			
Job Family & Role Profile:			
Post No:		Grade	

Summary of Role	
Reporting to:	
Purpose of the Post:	1.
The post holder is responsible for the following:	1.
Job Working Circumstances The post holder will be	1.

Person Specification

Directorate:		Resources	
Service Area & Section:			
Unit Manager:			
Post Title:			
Job Family & Role Profile:			
Post No:		Grade	

Role Criteria No.1	Education, Qualifications & Training
Essential	
Desirable	
Evidence	All certificates to be provided at interview for validation.
Role Criteria No.2	Skills /Technical / Professional Competence
Essential	Candidates must have a high level of technical competence in the areas specified in the Job Description.
Desirable	
Evidence	Valid certification and/or registration/CPD
Role Criteria No.3	Experience
Essential	1.
Evidence	At interview, then in post
Role Criteria No.4	Competencies & Abilities
Essential	1.
Desirable	
Evidence	At interview, then in post
Role Criteria No.5	Commitment to Equal Opportunities
Essential	Candidates will demonstrate that all activities are undertaken in accordance with the Equalities Act 2010 and Swansea Council's Equal Opportunities Policy and Procedures. All employees and managers must be aware of the Equality Act so that it is considered in their work, where relevant, to ensure compliance with legislation.
Desirable	
Evidence	At interview, then in post

Role Criteria No.6	Current Driving Licence
Essential	Use of own car: Should the post holder have a disability and/or be unable to drive, then they may seek alternative means of transport/assistance, which must be an effective and cost effective method of travelling
Desirable	
Evidence	Evidence the post holder is appropriately insured for business purposes to be provided annually
Role Criteria No. 7	Compulsory Requirements for Introducing Change and New Ways of Working
Essential	1. Demonstrate commitment to the Council's new ways of working, providing a positive and supportive environment that initiates and enables innovative and sustainable working practices that deliver high quality services for our citizens. 2. Embrace change through actively and flexibly participating in and adapting to new ways of working with our citizens, as agreed through formal consultation with Trades Unions and HR Policies and procedures
Desirable	
Evidence	At interview, then in post
Role Criteria No. 8	Other Requirement
Essential	
Desirable	
Evidence	

Health Surveillance and Monitoring:	This post will require the post holder to take part in health surveillance and monitoring procedures.
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Safeguarding:	The Authority is committed to safeguarding and promoting the welfare of children and young people and expects all staff and volunteers to share this commitment.
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Welsh Language			
The Authority is committed to delivering an equally high quality service in Welsh and English and will support staff in providing this.			
Assessment of Posts			
All posts have to be assessed in respect of the Welsh Language requirements. The evidence of which has to be retained and available for (a) audit trail and (b) inclusion in annual report figures.			
Requirements for this post (See attached Welsh Language Skills Assessment)			
Understanding	Level:	Speaking	Level:
Reading	Level:	Writing	Level:
Based on the above, requirement for this post is as follows:			
Essential		Desirable	
To be learned		Not required	

Disclosure and Barring Service (DBS):	This post requires the postholder to have the level of DBS disclosure as indicated below:		
	Standard DBS Disclosure Application	Enhanced DBS Disclosure Application	No DBS Disclosure Application

Review/ Right to vary:	This Person Specification is as currently applies and will be reviewed regularly according to the Employee Performance Management Review Policy and the Performance Development Review and Appraisal process. The Job and Person Specification may be subject to other Variance within the remit of the Role Profile.
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Sign off			
Line Manager:		Date:	
Post Holder:		Date:	

Welsh Language Skills Framework

Level 0			
No Welsh language requirement identified for the post – but all recruits should be aware of the corporate requirements of the Welsh language standards and completion of the Welsh language awareness course is advised.			
Understanding	Speaking	Reading	Writing
➤ No Welsh language requirement identified	➤ No Welsh language requirement identified	➤ No Welsh language requirement identified	➤ No Welsh language requirement identified
Level 1			
Can understand basic everyday phrases if the speaker talks slowly and clearly and is willing to help. Can introduce yourself and others and can ask and answer questions regarding basic information, e.g. Where someone lives; what they like doing. Can pass on a simple message or make a straightforward request, e.g. via e-mail.			
Understanding	Speaking	Reading	Writing
➤ Can understand simple personal information details; e.g. where someone lives, his/her name, who the person wishes to see	➤ Can pronounce place names and personal names correctly. ➤ Can greet individuals face to face or over the telephone ➤ Can open and close a conversation or open and close a meeting.	➤ Can read short sentence, e.g. basic signs, simple instructions, agenda items, simple information on forms	➤ Can open and close an e-mail or letter ➤ Can write personal names, place names, job titles ➤ Can write a simple message to a colleague on paper or e-mail, e.g. such and such has called.
Level 2			
Can understand sentences when people talk about everyday situations, e.g. simple personal and family information. Can hold a basic conversation with someone to obtain or exchange straightforward information, e.g. discuss how a person is feeling; something which has happened; simple plan for the future. Can write and read messages in letters or e-mails describing familiar issues and written in short sentences.			
Understanding	Speaking	Reading	Writing
➤ Can understand when people speak slowly about everyday situations, e.g. providing personal information, talking about what they have been doing, what they would like to do, how they feel in general ➤ Can understand when people ask you to do something	➤ Can communicate simple information or ask common questions, e.g. to acquire information from an individual ➤ Can use Welsh to get to and emphasise with the individual but not able to conduct the entire conversation or session in Welsh ➤ Can hold a short conversation with an individual or exchange	➤ Can read short message and certain letters or e-mails, e.g. Those which make a request or ask you to pass on a message	➤ Can write a short message to a colleague asking a question, thanking her/him, explaining something, e.g. time and place of a meeting ➤ Can write a short letter or e-mail to arrange an appointment

	relatively straightforward information ➤ Can contribute to a meeting, but need to revert to English for specialist terms.		
Level 3			
Can understand the main points when an individual or colleague is talking about familiar subjects, e.g. during a conversation or small group meeting. Can hold extended conversations with fluent speakers about familiar subjects involving everyday work. Can describe experiences and events and provide concise explanations and reasons for opinions and plans. Can read articles, letters or e-mails about general subjects. Can write letters or e-mails about most subjects, e.g. requesting something; providing information; inviting somebody or organising an event.			
Understanding	Speaking	Reading	Writing
➤ Can understand individuals and colleagues when exchanging information or discussing plans, if the subject is familiar. ➤ Can understand a discussion at a meeting if the subject is familiar. ➤ Can understand individuals and colleagues in a familiar situation or in everyday conversation.	➤ Can take part in most conversations with colleagues about work and plans if the vocabulary is not too technical. ➤ Can hold a conversation with an individual or exchanging relatively straightforward information. ➤ Can contribute to a meeting but need to revert to English for specialist terms. ➤ Can adapt the style of language to suit the audience.	➤ Can understand most e-mail messages or letters concerning day to day work. ➤ Can guess the meaning of a word based on context if the subject is familiar. ➤ Can read a simple, straightforward article in a newspaper or magazine types of written material.	➤ Can write a letter or e-mail to an individual, or colleague about most topics in order to request something; provide an explanation; describe an experience or situation; invite people or organise an event. ➤ Can write relatively accurately when drafting a short information leaflet or information Welsh as required.
Level 4			
Can usually follow most conversations or discussions, even on unfamiliar topics, unless the speaker has a strong or unfamiliar accent. Can talk confidently with fluent speakers about familiar subjects relating to work, and can express an opinion, take part in discussion, and talk extensively about general topics, e.g. In meetings or one-to-one situations with individuals. Can understand most correspondence, newspaper articles and reports intended for fluent speakers with the aid of a dictionary and can scan long texts to find details. Can complete forms and write reports relating to work and respond accurately.			
Understanding	Speaking	Reading	Writing
➤ Can follow most conversations and discussions with individuals or colleagues even if the subject matter is unfamiliar.	➤ Can contribute effectively to internal and external meetings in a work context.	➤ Can read most correspondence and scan long texts to find details.	➤ Can produce correspondence of all types, short reports, documents and literature with support of an editor or electronic aid.

➤ Can understand differences in register and dialect.	➤ Can converse comfortably with individuals and exchange information as required. ➤ Can argue for and against a specific case. ➤ Can chair meetings and answer questions from the chair confidently.	➤ Can understand most newspaper articles and reports with the aid of a dictionary. ➤ Can understand novels and other texts, unless written in a very formal or colloquial form.	
Level 5			
Can understand everything that is being said. Can talk extensively about complex issues, presenting difficult information and can facilitate and summarise extended or complex discussions. Can summarise information from different sources (orally and in writing) and present it in a coherent way. Can express themselves spontaneously, fluently and in details, adapting the language to suit the audience.			
Understanding	Speaking	Reading	Writing
➤ Can follow all conversations and discussions with individuals or colleagues. ➤ Can understand the ambiguity and nuance of language.	➤ Can express yourself fully in detail, even when discussing complex issues. ➤ Can adapt the style and register of your language to suit the audience.	➤ Can read and understand almost all written texts without difficulty, referring to a dictionary occasionally. ➤ Can read long texts to find relevant details and can understand most types of written material.	➤ Can write reports in a clear style appropriate to the reader with the support of electronic language aids. ➤ Can write formal or informal Welsh as required. ➤ Can write a range of documents accurately and with confidence.

Disclosure and Barring Service (DBS) Disclosure Checks

The DBS was established under Part V of the Police Act 1997 and was launched in March 2002.

The DBS enables organisations in the public, private and voluntary sectors to make safer recruitment decisions by identifying candidates who may be unsuitable for certain work, especially that involve children or vulnerable adults.

The DBS can issue 5 levels of Disclosure Certificates, depending on the position applied for, namely Standard, Enhanced, Enhanced with ISA check (children), Enhanced with ISA check (adults) and Enhanced with ISA check (children and adults)

Prospective applicants should be aware that before any offer of appointment is confirmed the successful candidate will be required to complete an online application form for the appropriate level of disclosure. Proof of the successful candidate's identity will also be required in the form of the following: Passport, Driving Licence, Birth Certificate and Utility Bills.

The Authority actively promotes equality of opportunity for all existing employees and prospective applicants. Candidates are selected on the basis of skill, qualifications and experience, and their match against the Person Specification. A criminal record will not necessarily bar applicants from working with the Authority. It will depend on the nature of the position and the circumstances and background of the offence.

The Authority has a written Policy on the Recruitment of Ex-offenders, which complies with the DBS Code of Practice, and undertakes to treat all applicants fairly.

The following information is available from the Employee Services Helpdesk, Room 323, The Guildhall, SWANSEA SA1 4PE; Telephone 01792 636098, email servicecentrehelpdesk@swansea.gov.uk.

- DBS's Code of Practice;
- Authority's Policy on the Security of Confidential Disclosure information;
- Information on the Rehabilitation of Offenders Act 1974

Further information about the Disclosure Scheme is available at www.homeoffice.gov.uk/agencies-public-bodies/dbs/.



Corporate Plan 2018 - 2022

Delivering a successful and sustainable Swansea

Our ambitions and commitments to residents – our well-being objectives

We have prioritised six well-being objectives. These are:

- **Safeguarding** people from harm – so that our citizens are free from harm and exploitation.
- Improving **Education & Skills** – so that everyone in Swansea gains the skills and qualifications they need to succeed in life.
- Transforming our **Economy & Infrastructure** – so that Swansea has a thriving mixed use City Centre and a local economy that will support the prosperity of our citizens.
- **Tackling Poverty** – so that every person in Swansea can achieve his or her potential.
- Maintaining and enhancing Swansea's **Natural Resources and Biodiversity** – so that we maintain and enhance biodiversity, reduce our carbon footprint, improve our knowledge and understanding of our natural environment and benefit health and well-being.
- **Transformation & Future Council** development – so that we and the services that we provide are sustainable and fit for the future.

Our Values

Our plans will be built on three clear values which will guide the way that we work, how we develop as an organisation and our decision making through the years ahead.

➤ **People Focus**

We will focus on community needs and outcomes and on improving the lives of the people who live and work in Swansea. We will also

We will promote and support a culture of innovation. We will think and work differently to improve our ability to deliver and to meet the financial, demographic and societal challenges we face. We will share learning across the Council, as part of our Innovation Programme

EV4

[Staff home](#)
[Training](#)
[Corporate learning and development courses](#)
[Corporate induction](#)
[Safeguarding children and vulnerable adults training](#)
[Violence against women, domestic abuse and sexual violence \(VAWDASV\)](#)
[Leadership, management and development courses](#)
[Personal effectiveness development courses](#)
[Team building and team effectiveness courses](#)
[IT training courses](#)
[Welsh language lessons for staff](#)



Corporate induction

All staff are required to carry out this training. Managers should ensure that all new starters complete it when they start.

This is an online course that you can do in your own time on the [Learning Pool](#) website.

[Complete the corporate induction course online](#)

You will need to create an account if you have not already done so previously (on the right hand side of the learning pool screen). Once you have done this follow the instructions to create a user name and password. This will generate an email to your works email address. From this email, follow the link to log into the system.

Once you are logged in, click on 'Mandatory and Regulatory' in the course list and select 'Induction'. You can self-enrol on this course to begin.

Compulsory modules

- Induction
- Introduction to Swansea
- Housing benefits and fraud (there is a link to this test as you progress through the course)

Optional module

- Introduction to local government

You do not need to complete the course all in one go as the system allows you to log out and in and shows your progress.

If you don't have access to a computer contact the corporate training team.

EV5

[Home](#) / [Courses](#) / [Mandatory and Regulatory](#) / [Induction_1](#) / [Enrolment options](#)

Administration

Course administration

Enrolment options

Corporate Induction

Enrolment options

 Corporate Induction

This course is made up of one module.

The module must be worked through for the course to register as complete, the estimated time this course will take **40 minutes**, you don't need to complete the course in one sitting, you may work through it over several days.

Self enrolment (Learner)

No enrolment key required.

Enrol me

EV6

[Staff home](#)
[Staff information](#)
[News + updates](#)
[Staff news](#)
[2015 staff news](#)
[September 2015](#)
[September 2015 staff roadshows](#)
[Staff urged to take care with](#)

Induction training update for managers

Managers are being reminded of the importance of ensuring that all new staff complete the Induction E-Learning Course that has been produced by the Corporate Learning and Development Team.

The course is mandatory for all new members of staff.

The E-Learning zone can be accessed by clicking on the following link: [Learning Pool](#)

Staff or managers who don't have access to the intranet or need further advice should call the Corporate Learning and Development Department on 636232.



Probation Policy

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1. Introduction

- 1.1. The purpose of this policy is to provide a framework for managers to monitor and support the progress of new employees in the early stages of their employment. It will also enable managers to deal promptly and fairly with any apparent shortcomings in a probationers' work performance or conduct in accordance with the procedure outlined below.
- 1.2. In normal circumstances, employees will receive an interim probation report at the end of the first 3 months and then a final report at the end of 6 months; in some circumstances the probationary period may be extended.
- 1.3. However, an employee's employment may be ended at any stage during the probationary period in exceptional circumstances.

LO2. Explain key sources of information, including legislative information, which underpin performance management activities.

My role in Swansea Council is a Workforce Analytical, Recruitment and Changes Officer. One part of my role that supports managers with performance management is to assist with making sure managers carry out the probation period process. Every month two probation reports are run (EV8) by the Data Team for employee's who have been with the Council for 3 months and 6 months. These reports include the date the employee was hired and the date their probation period is due. These reports are sent to my team to action. We send out a blank probation report (EV9 and EV10) form to the appropriate manager for each employee and ask them to complete the form and send back to us (EV11). The form covers the main responsibilities of the employee, any training the employee has completed since appointment, sickness days and reasons for sickness, specific examples of the employees' strengths and weaknesses and a comment on their overall performance, any unsatisfactory aspects of their performance and what action will be taken to rectify this and any training needs that have been identified. There is also a rating scale included in the form for performance criteria ranging from 'very good' to 'unacceptable'. At the bottom of the form there is a box for employee's comments, manager's comments and countersigning officer comments. Giving the employee an opportunity to comment on their appraisal during the probation period gives them an opportunity to engage with their objectives.

The probation form follows the performance management cycle. The planning stage is where the strengths and weaknesses of the employee are established, and a development plan is made to help the employee to grow. Going through the job role with the employee helps them understand what is expected of them and how they fit into the organisation. The development stage is the employee acting out these plans. They can take part in training in order to meet their full potential. The performance stage is where the manager monitors the progress of the employee. The six-month probation can assess how the employee has done since the three-month probation. If there are any issues it is important that these are addressed and dealt with accordingly. It is also important for the employee to hear feedback from the manager regarding their performance, both positives and negatives. It is the final review stage where the employee finds out if their employment has been confirmed. The review should be unbiased, and the employee should be involved (Ormerod, 2018).

As probation report is a mandatory practice, it is the responsibility of my team to ensure we receive these forms in a timely manner. I used my Microsoft Outlook calendar function to set reminders to chase the probation forms with the manager (EV12). It is important for managers to complete the probation form with employees because by understanding the progress of individuals, it can help lead them to be successful which in turn leads to the organisation being successful (Armstrong, 2006, p. 1). Without my team received the six-month probation form, we cannot send out the confirmation of employment letter to the employee which is an important incentive to performing well (CIPD, 2020).

Once the form has been completed and sent back to us, we save it to the employee's record (EV13). If it is for a six-month probation and the employee has passed this probation, it is part of our role to send out a Confirmation of Employment letter (EV14). If the probation period has been deemed as unsatisfactory by the manager, it is possible to extend the probation period by another 3 months. The manager will let my team know if this is the case so we can send out a Probation Extension letter (EV15). Probation extensions are only granted under exceptional circumstances where the manager believes the employee is capable of reaching the required standard of their job role in a short period of time or if there have been external events that affected the employee's progress in the initial probation period.

On the Staffnet for Swansea Council, there is a page called the Manager's Toolkit (EV16). This is there for managers to provide guidance for their team and to help maximise their full potential. It includes a Manager Appraisal Guide (EV17) which helps the manager complete the appraisal online. If a manager asks for help with appraisals this is what my team would send a link to.

References

Armstrong, M. and Brown, D. (2019) *Strategic Human Resource Management: Back to the future?* Brighton: Institute of Employment Studies.

Chartered Institute of Personal Development (2020) *Performance management: an introduction*. Available at: <https://www.cipd.co.uk/knowledge/fundamentals/people/performance/factsheet> (Accessed: 2 September 2021).

Ormerod, S. (2018) *Performance Management Part I: The Cycle*. Available at: <https://leapsolutions.com/performance-management-part-i-the-cycle/>. (Accessed: 1 September 2021).

Evidence

EV8

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Hire Date	Date probation end	Probation period	Employee Number	Assignment Number	Last Name	First Name	Org Level 2	Org Level 3	Org Level 4	Supervisor Name	Supervisor Number	User Employee Person Type	User Assignment Status
2														
3														
4														
5														
6														
7														
8														
9														



PROBATION REPORT

EMPLOYEE DETAILS

Name:	
Position:	
Date of commencement:	
Grade:	
3/6 month review – please state:	
Date review is due:	

MANAGER'S ASSESSMENT

To be completed by the line manager in advance of the 3/6 month stage and then shown to the employee for discussion at the interview.

1.	Briefly outline the employee's key responsibilities:
2.	Give brief details of any courses etc. attended since appointment:
3.	Sickness - if the employee has been absent due to sickness please state number of days and main reasons:

4.	Briefly summarise the employee's main strengths/weaknesses affecting job performance, giving specific examples, and comment on the employee's overall performance:
5.	If any unsatisfactory aspects of performance have been identified please state what action has been or will be taken to attempt to rectify this:
6.	Briefly outline what training needs have been identified, with timescales, for the employee's future development:

RATING SCALES

Manager to indicate their assessment of the employee using the appropriate performance criteria and rating scales

Performance Criteria	Very Good	Good	Acceptable	Unacceptable	Comments
Understanding information					
Retaining knowledge					
Seeing task through					
Initiative					
Working with others					
Service to customers					

Communication -Verbal					
Communication –Written					
Numerical Skills					
Staff Management					
Working under pressure					
Enthusiasm & Commitment					
Creativity					
Time keeping					

SOCIAL SERVICES STAFF ONLY

*During the probationary period how did the employee rate
in each Core Area within the Staff Development Portfolio*

NO .	CORE AREA	RATING SCALES				
		Very Good	Good	Acceptable	Unacceptable	Comments
1.	Understand the principles of care					
2.	Maintain safe working practices					
3.	Understanding your role and agency					
4.	Understanding the needs of service users and carers					
5.	Understand the effects of service delivery on the service user/worker					

EMPLOYEE'S COMMENTS

This is an opportunity for you to comment on your line manager's assessment

--

Signature of employee:	
Date of interview:	

MANAGER'S COMMENTS

*Indicate any change you may wish to make to your assessment
in the light of your discussion with the employee.*

--

Signature of line manager:	
Date:	

COUNTERSIGNING OFFICER'S COMMENTS

If you do not agree with any comments made by either

--

the line manager or employee please give details below

Signature of countersigning officer:

Date:

**THE FOLLOWING IS ONLY TO BE COMPLETED IN RESPECT OF 6 MONTHLY ASSESSMENTS
BY THE LINE MANAGER AND COUNTERSIGNING OFFICER**

Please delete as appropriate

a)	I am satisfied that the employee's performance during the probation period has been satisfactory and I recommend that his/her appointment be confirmed.
b)	I am not entirely satisfied that the employee's performance during the probation period has been satisfactory. However, I consider that with additional assistance he/she may be capable of reaching the required standard. I, therefore, recommend that his/her probationary period be extended for a further 3 months and that a final assessment be made at that time.
c)	I am not satisfied that the employee's performance during the probation period has been satisfactory and I, therefore, recommend that his/her employment be ended.

Signature of line manager:

Date:

Signature of countersigning officer:

Date:

TO BE COMPLETED BY HR & OD

Complete as appropriate

a) 6 Month Probation satisfactorily completed

Letter sent to probationer:

YES/NO

Date:

Initials:

Copy in file:

YES/NO

b) Probation not satisfactorily completed - probation period extended

Probation extended to *(please state date)*:

Letter sent to confirm extension:

YES/NO

Date:

Initials:

Copy in file:

YES/NO

c) Probation not satisfactorily completed - employment terminated

Letter of termination of employment sent:

YES/NO

Date:

Initials:

Copy in file:

YES/NO

EV10

From: Elinor Beynon
Sent: 13 May 2021 12:32
To: 'Elinor Beynon' <elinor.beynon@swansea.gov.uk>
Subject: RESTRICTED - Sarah James - 3 Month Probation

Hi [redacted],

Please can you complete the attached 3 month probation form for Sarah James and send back to me?

Many thanks

Regards
Ellie Beynon



Ellie Beynon
Gweithlu – Swyddog Dadansoddeg, Recriwtio a Newidiadau
Workforce – ARC Officer

☎ 01792 636098
✉ Elinor.Beynon@abertawe.gov.uk
✉ Elinor.Beynon@swansea.gov.uk

*Croesewir gohebiaeth yn y Gymraeg a byddwn yn ymdrin â gohebiaeth Gymraeg a Saesneg i'r un safonau ac amserlenni.
We welcome correspondence in Welsh and will deal with Welsh and English correspondence to the same standards and timescales.*



PROBATION REPORT

EMPLOYEE DETAILS

Name:	
Position:	Independent Domestic Violence Advisor
Date of commencement:	23 rd November 2020
Grade:	8
3/6 month review – please state:	6 months
Date review is due:	22 nd May 2021

MANAGER'S ASSESSMENT

To be completed by the line manager in advance of the 3/6 month stage and then shown to the employee for discussion at the interview.

1. **Briefly outline the employee's key responsibilities:**
 1. Identify and assess the risks and needs of domestic abuse victims using an evidence-based risk identification checklist.
 2. Focus on and prioritise high risk cases and provide a pro-active, short to medium term crisis intervention service through individual safety planning and personal support.
 3. Work with high risk victims of domestic abuse to help them access services to keep them and their children safe.
 4. Advocate for high risk victims with agencies who can help to address the domestic abuse by:
 - Understanding the role of all relevant statutory and non-statutory services available to domestic abuse victims and how your role fits into them.
 - Providing advocacy, emotional and practical support and information to victims including in relation to legal options, housing, health and finance.
 - Working directly with all key agency partners to address the safety of high risk victims and ensuring that their safety plans are coordinated particularly through the MARAC.
 5. Manage a case load ensuring each client receives the appropriate service individual to their needs.
 6. Support the empowerment of the client and assist them in recognising the features and dynamics of domestic abuse present in their situation, and help them regain control of their lives.
 7. Understand multi-agency partnership structures and work within a multi-agency setting which will include participation at the MARAC. You will contribute interventions and help design a plan to protect victims and any children, while maintaining an independent role on behalf of your client, keeping their safety as central to any response.
 8. In accordance with your organisation's case management policy: Be proactive with your *line manager* in carrying out periodic case reviews based on a review of risk and abuse which:
 - Feeds back into action planning to further progress, signpost or close cases and;
 - Provides feedback to your clients/agencies.
 9. Help maintain accurate and confidential case management records *and databases* and contribute to monitoring information for the service.

	10. Comply with data protection legislation, confidentiality and information sharing policy and procedures and all legislation connected to your work. 11. Support colleagues and partner agencies, through awareness raising and institutional advocacy, in order to provide the best possible service for victims of domestic abuse. 12. Respect and value the diversity of the community in which the service works in, and recognise the needs and concerns of a diverse range of survivors ensuring the service is accessible to all. 13. Remain up-to-date and compliant with all organisational procedures policies and professional codes of conduct and uphold standards of best practice.
2.	Give brief details of any courses etc. attended since appointment: SafeLives accredited IDVA training. Social Services induction training. Sexual abuse disclosures training- PCC funded
3.	Sickness - if the employee has been absent due to sickness please state number of days and main reasons: No periods of sickness.
4.	Briefly summarise the employee's main strengths/weaknesses affecting job performance, giving specific examples, and comment on the employee's overall performance: ... has integrated really well into the team and is a strong team player. She is always keen to help her colleagues where possible, and eager to learn and improve her practise. She has learnt the internal systems quickly, adapted well to the IT systems change. ... has good engagement with victims, and is empathic with strong communication skills. Overall performance is good, no concerns. ... has received positive feedback from victims, and this has been highlighted by the Head of Service.
5.	If any unsatisfactory aspects of performance have been identified please state what action has been or will be taken to attempt to rectify this: No unsatisfactory aspects of performance.
6.	Briefly outline what training needs have been identified, with timescales, for the employee's future development:

	... has nearly finished the IDV accredited training. This is a large piece of detailed training. She is not in a position to take on any further training as yet, but is looking to attend the culturally harmful practise session later in the year.
--	---

RATING SCALES

Manager to indicate their assessment of the employee using the appropriate performance criteria and rating scales

Performance Criteria	Very Good	Good	Acceptable	Unacceptable	Comments
Understanding information	X				
Retaining knowledge	X				
Seeing task through	X				
Initiative	X				
Working with others	X				
Service to customers	X				
Communication -Verbal	X				
Communication –Written	X				
Numerical Skills	X				
Staff Management	X				
Working under pressure	X				
Enthusiasm & Commitment	X				
Creativity	X				
Time keeping	X				

SOCIAL SERVICES STAFF ONLY

During the probationary period how did the employee rate in each Core Area within the Staff Development Portfolio

NO	CORE AREA	RATING SCALES				
		Very Good	Good	Acceptable	Unacceptable	Comments
1.	Understand the principles of care	X				
2.	Maintain safe working practices	X				
3.	Understanding your role and agency	X				
4.	Understanding the needs of service users and carers	X				
5.	Understand the effects of service delivery on the service user/worker	X				

EMPLOYEE'S COMMENTS

This is an opportunity for you to comment on your line manager's assessment

... feels this is a true reflection of her abilities and work over the last 6 months. She is grateful for the support of her colleagues and manager. ... looks forward to new opportunities and learning the role in more depth and gaining more experience.

Signature of employee:	
Date of interview:	25.05.2021
MANAGER'S COMMENTS <i>Indicate any change you may wish to make to your assessment in the light of your discussion with the employee.</i>	
... is a great addition to the team, really happy with her progress and looking forward to seeing her develop in the role.	
Signature of line manager:	
Date:	27.05.2021
COUNTERSIGNING OFFICER'S COMMENTS <i>If you do not agree with any comments made by either the line manager or employee please give details below</i>	
Signature of countersigning officer:	
Date:	28/05/21

**THE FOLLOWING IS ONLY TO BE COMPLETED IN RESPECT OF 6 MONTHLY ASSESSMENTS
BY THE LINE MANAGER AND COUNTERSIGNING OFFICER**

Please delete as appropriate

a)	I am satisfied that the employee's performance during the probation period has been satisfactory and I recommend that his/her appointment be confirmed.
b)	I am not entirely satisfied that the employee's performance during the probation period has been satisfactory. However, I consider that with additional assistance he/she may be capable of reaching the required standard. I, therefore, recommend that his/her probationary period be extended for a further 3 months and that a final assessment be made at that time.
c)	I am not satisfied that the employee's performance during the probation period has been satisfactory and I, therefore, recommend that his/her employment be ended.

Signature of line manager:	
Date:	
Signature of countersigning officer:	
Date:	

TO BE COMPLETED BY HR & OD

Complete as appropriate

a) 6 Month Probation satisfactorily completed

Letter sent to probationer:	YES/NO
Date:	
Initials:	
Copy in file:	YES/NO

b) Probation not satisfactorily completed - probation period extended

Probation extended to (<i>please state date</i>):	
Letter sent to confirm extension:	YES/NO
Date:	
Initials:	
Copy in file:	YES/NO

c) Probation not satisfactorily completed - employment terminated

Letter of termination of employment sent:	YES/NO
Date:	
Initials:	
Copy in file:	YES/NO

EV12

The screenshot shows the 'Appointment' window in Microsoft Outlook. The title bar reads 'LL - Appointment'. The ribbon includes 'File', 'Appointment', 'Insert', 'Format Text', and 'Review'. The 'Appointment' tab is active, showing options like 'Save & Delete Close', 'Forward', 'Appointment', 'Scheduling Assistant', 'Teams Meeting', 'Meeting Notes', 'Invite Attendees', 'Show As: Busy', 'Reminder: 15 minutes', and 'Recurring'. The 'Subject' field contains 'LL'. The 'Location' field is empty. The 'Start time' is 'Wed 02/06/2021' at '08:30', and the 'End time' is 'Wed 02/06/2021' at '09:00'. The 'All day event' checkbox is unchecked. The body of the appointment contains the text: 'Chase [REDACTED] for [REDACTED] 6 month probation extended to 1st June 2021.'

EV13

From:
Sent: 25 May 2021 09:14
To: Elinor Beynon <Elinor.Beynon@swansea.gov.uk>
Subject: RE: RESTRICTED - 6 Month Probation

Thank you.

Regards



Arweinydd Tîm Mentoriaid Cyflogadwyedd
Employability Mentor Team Leader

From: Elinor Beynon <Elinor.Beynon@swansea.gov.uk>
Sent: 25 May 2021 09:12
To: Jc
Subject: RE: RESTRICTED - 6 Month Probation

Hi

Thanks for sending this to me. I have sent her 6 month probation confirmed letter.

Many thanks,

Regards
Ellie Beynon



Ellie Beynon
Gweithlu – Swyddog Dadansoddeg, Recriwtio a Newidiadau
Workforce – ARC Officer



Service Centre - Workforce Team

The Guildhall, Swansea, SA1 4PE

www.swansea.gov.uk

Please ask for: Elinor Beynon

Direct Line: 01792

E-Mail: Elinor.Beynon@swansea.gov.uk

Our Ref:

Your Ref:

Date:

Dear,

Confirmation of Employment

I am pleased to inform you that following the completion of your 6 month probation period, your employment with Swansea Council is now confirmed. The terms of your employment remain as those set out in your letter of appointment and contract of employment.

I would also like to take this opportunity to wish you well in your future career with the Council.

Yours sincerely,

A handwritten signature in dark ink, appearing to read "E. Beynon".

Elinor Beynon
Workforce Arc Officer



Service Centre - Workforce
 The Guildhall, Swansea, SA1 4PE
www.swansea.gov.uk

****Enter Address****

Please ask for:
 Direct Line: 639098
 E-Mail:
 Our Ref:
 Your Ref:
 Date:

Dear

PROBATION REPORT

As you are aware, on commencement in your current post, you were subject to a six month period of probation.

I am now in receipt of your Probationary Report, which was undertaken on by and would confirm that your period of probation is to be extended by 3 months, i.e. until Date.

In this connection, a final Probationary Report will be completed in ... when you will be seen again by your Line Manager who will carry out a further assessment.

I would remind you of Paragraph 14 of your Schedule of your Main Terms and Conditions wherein it is stated that failure to reach satisfactory standards during your probationary period will result in your employment being terminated.

Please do not hesitate to contact your Line Manager or myself if you have any queries in connection with this matter.

Yours sincerely,

Workforce ARC Officer

To receive this information in alternative format, or in Welsh please contact the above.
 I ddarbyn yr wybodaeth hon mewn fformat arall neu yn Gymraeg, cywlltwch â'r person uchod.

Managers' toolkit

In this toolkit you will find resources to help you in your everyday work as a manager or supervisor.

As managers or supervisors within the City and County of Swansea, one of the primary responsibilities is to provide team members with guidance, direction and assistance, to help them maximize their potential and help contribute to the ongoing success of the organisation.

We always welcome feedback so please make any suggestions or let us know of any missing information on the staffnet [feedback form](#).

If you need to contact your HR officer please ring the helpdesk on (63)6098 or email servicecentrehelpdesk@swansea.gov.uk



Manager self-service on Oracle

Managers are able to view employment and absence details (flexi, sickness, maternity, paternity and special leave) for any staff for whom they have direct supervisory responsibilities (excluding any agency workers).



Management of attendance and absence

The application of the management of absence policy and procedure will ensure a fair, consistent and supportive approach to managing sickness absence.



Manager appraisal guide

Online appraisals are now available and guidance can be found here, along with paper forms for managers who do not have access to Oracle.



Leaver checklist / exit

Using the checklist below, work with colleagues in your HR team to make sure that employees leaving the council get the information they need.



Manager training

Managers must complete the mandatory courses listed here.



Financial information for managers

Information about Oracle, iSiop etc



Health and safety for managers

Health and safety encompasses occupational health, help with stress management and more for staff.



Recruitment manager guide

Your guide to attracting and selecting the best people for the City and County of Swansea.



Workforce planning

Guidance and templates to help managers undertake workforce planning and succession planning for their team/service/directorate.

Staff home

Self serve

Appraisals and performance management

Manager appraisal guide

Employee appraisal guide

Qualifications

Employee performance management policy



Manager appraisal guide

Online appraisals are now available and guidance can be found here, along with paper forms for managers who do not have access to Oracle.

How to use the online appraisal system as a manager

1. Setting up the appraisal

[Creating the appraisal as a manager \(PDF, 4MB\)](#)

2. Updating and approving online appraisals

[Completing appraisal using manager self-service \(PDF, 2MB\)](#)

[Completing appraisal using the manager notifications \(PDF, 1MB\)](#)

[Updating appraisal form during or following the meeting using manager self-service option \(PDF, 4MB\)](#)

[Updating appraisal form during or following the meeting using the manager notification \(PDF, 3MB\)](#)

3. Copying objectives into appraisals

If you completed last year's appraisal using Oracle, please refer this guidance for copying last year's objectives into the new appraisal.

[Manager guidance for copying objectives \(appraisals\) \(Word, 339KB\)](#)

LO3. Provide timely and accurate information to colleagues regarding performance management activities.

Before the Covid-19 pandemic, the Flexible Working Scheme was introduced to some departments of Swansea Council. This allowed for employees to have more flexibility over the hours they worked and also gave them the opportunity to work from home for 50% of their working week. With this new scheme, the way performance management was done had to be updated. Since the Covid-19 pandemic, performance management activities have developed even more.

The manager of the Service Centre sent out an Employment Engagement Survey (EV18). With the data collected, an action plan (EV19) was established to help managers and employees since with their performance since working from home. This action plan includes managers to stay connected with their teams through regular one-to-ones, team meetings, team channel ongoing conversations and a half day per month drop-in session. An effort must be made to stay connected with your team since home working has become the new norm as they encourage collaboration and accountability is shared. Life outside of work can also affect workers more than before if they are working from home so it is important for managers to check in regularly to make sure their team is coping. Having meaningful conversations also develops trust which is needed for remote working. It keeps employees engaged with their work and keeps them up to date with the organisation's goals (Wigert, 2020).

The action plan also called for traditional training methods and training for new starters to be redesigned so they can be completed through team videos.

Monthly one-to-ones were also enforced instead of the usual annual appraisal meetings. A standard one-to-one form (EV20) is used in each meeting and is completed by the line manager. The form includes asking the employee to rate how they are feeling and how they feel about working from home on a scale of one to ten, asking if anything is worrying them, how they have gotten on with their targets the past month, if there is any additional training they would like and what they hope to achieve by next the month. To set objectives for the next month, the Goal Theory can be used as guidance where the goals must be challenging but achievable. Locke (1968) explains how setting clear goals and providing feedback help to motivate the employee which leads to successful performance (Mindtools, 2021).

The wellbeing of workers has become a big focus since the pandemic. It is important for employees to have a say in their objectives and in making decisions as this leads them to feeling more engaged and empowered which in turn leads to great wellbeing. However, it is important that a good work-life balance is kept to ensure that employees do not feel overworked and exploited. This leads to negative effects on their wellbeing which in turn leads to the organisation being unsuccessful (Armstrong and Brown, 2019, p.29). The action plan addresses this by asking managers to encourage workers to take regular breaks, start and finish work and appropriate times and to take leave. The action plan also mentions to arrange social activities which is way of keeping morale up to benefit wellbeing.

With regards to Swansea Council's probation process and appraisals, the Performance Management Cycle is present (Ormerod, 2018).

High performance work systems involved in Swansea Council that contribute to sustained organisational performance include rigorous and sophisticated recruitment processes, investing in training and development, transparency of information from managers to employees, harmonised terms and conditions and flexible working to help with a good work-life balance (Taylor, 2016, p. 200).

Since a lot of teams are now working from home, it is important for Swansea Council to ensure their induction process still makes new starters feel settled and understand what is expected of them. They will miss out the human aspect of this process if no effort is made which can lead to them leaving. One way Swansea Council can help the process is by senior staff delivering a video to new starters to explain the culture of the organisation. This gives people a sense of who they are and adds a personal touch to the experience. A profile of the new starter could also be sent around and encouragement to the team to connect with them to build relationships. Swansea Council already has a buddy system in place which is similar to this. Another way to help is by setting up Chatbot technology to cover simple queries new starters might have which then provides more time for the team and HR to build relationships with them instead (Faragher, 2020).

References

Armstrong, M. and Brown, D. (2019) *Strategic Human Resource Management: Back to the future?* Brighton: Institute of Employment Studies.

Faragher, J. (2020) *Why virtual onboarding can still be a warm welcome*. Available at: <https://www.personneltoday.com/hr/why-virtual-onboarding-can-still-be-a-warm-welcome/> (Accessed: 6 September 2021).

Mind Tools (2021) *Locke's Goal-Setting Theory*. Available at: https://www.mindtools.com/pages/article/newHTE_87.htm (Accessed: 2 September 2021).

Ormerod, S. (2018) *Performance Management Part I: The Cycle*. Available at: <https://leapsolutions.com/performance-management-part-i-the-cycle/>. (Accessed: 1 September 2021).

Taylor, S. (2016) 'Improving Organisational Performance' in Taylor, S. and Woodhams, C. (ed.) *Human Resource Management: People and Organisations*. London: Chartered Institute of Personal Development.

Wigert, B. (2020) *Performance Management Must Evolve to Survive COVID-19*. Available at: <https://www.gallup.com/workplace/318029/performance-management-evolve-survive-covid.aspx> (Accessed: 4 September 2021).

Evidence

EV18

The Service Centre

Staff Engagement Survey – Working From Home

A survey was undertaken to ask staff how they were feeling about our current working arrangements and for us to understand how we would prefer to work going forward.

One very important aspect of the survey was to be able to highlight any problems/issues that staff may be facing, so we can try and support everyone to overcome any difficulties they may be experiencing.

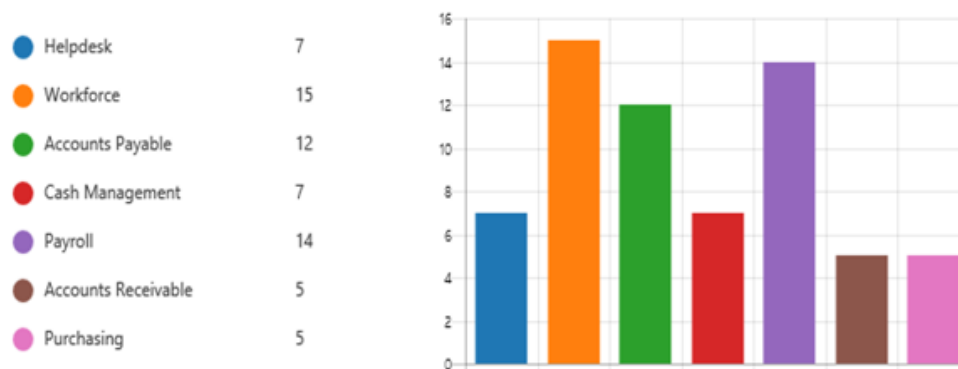
The survey will also help to inform the future way of working when the Guildhall is reoccupied and the longer term accommodation strategy.

Results of the survey:

There were 65 responses out of 83 from across all the teams (78% return rate), a very positive return rate and a big thanks to everyone who took part.

Below are the findings of the survey including the broad themes that were identified from all responses.

Q1. Which team do you work in?



Action Plan – Service Centre Survey			
Task No	Task	Resolution	Comments
1	Managers to ensure they stay connected to teams	Regular 1-1's Team Meetings Teams Channel for ongoing conversations Updated 1-1 Template Half day per month Drop in Session	
2	Support good team working	Teams Channel Regular Meetings Virtual Social Activities	
3	Agree outputs (where possible) and set expectations ensuring flexibility with priority on business needs	Using 1-1 Template	
4	Drop in sessions for staff	Set up in Outlook	Sian arranged monthly on a Monday 9.30 til 12.00 first Monday of every month, doesn't have to be work related
6	Employee Wellbeing	1-1 Template to be used Check Ins Social Activities	
7	DSE assessment	All staff complete on staffnet	Issues to be raised with Managers and escalated where needed
8	Package of equipment	tbc	This is being taken forward as part of the Agile Task Group, but Managers can arrange for
10	Encourage & Promote a positive worklife balance	All team members take regular breaks away from the screen, start and finish work at appropriate times and take leave	This is vitally important to ensure work and life do not merge into one and to promote wellbeing and ensure a good worklife balance, whilst balancing the needs of the business
11	Attend bi monthly team meetings	Sian to attend team meetings	General catch up & any updates
13	Traditional methods for training and new starters needs to be redesigned	Team Videos Up to Date Process documents	
Please note the above is not set in stone and if anyone has any suggestions/ideas please let us know.			

Service Centre 1-1 Template

Section

Name

Date

On a scale of 1 to 10 - how are you feeling?

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

(use colour to highlight box eg above)

Further discussion - if low "why what's happened/do you want to talk about it? If high, good news also needs to be acknowledged/discussed (use box below)

On a scale of 1 to 10 - how is working from home

1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	----

(use colour to highlight box eg above)

Further discussion - if low "why what's happened/do you want to talk about it? If high, good news also needs to

Is there anything worrying/bothering you that you'd like to talk about?

--

How do you think things have gone since our last 1-1, have you been able to meet your targets, or has anything prevented you from doing this? If no fixed targets can use Stats from previous month.

--

Is there any additional training you would like that would help in your role and/or personal development?

--

What do we need to achieve before our next 1-1 (actions/target setting)

--

Points for discussion from Supervisor/Team Lead (Praise/areas of concern - give an update on projects/other areas eg
(Oracle Fusion, wider Council work or team/Service Centre specific)

--

Any additional notes/comments

--