



Loreburn Group

Performance

Management Policy

Policy	Performance Management					
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Approved by	MC	X	LET	X	MT	
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Policy champion	Director of Corporate Services					

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1 Purpose of this Policy

- 1.1 Loreburn's purpose is 'Creating GREAT Places to Live'. Further details regarding our vision and ways of working are described outlined in the Employee Handbook.

2 Aims of this Policy

- 2.1 This Policy aims to set out our approach to performance management in order to meet our Core Values, Strategic Objectives and to fulfil our purpose and vision.

3 Policy Statement

- 3.1 Performance issues should always be addressed at an early stage to ensure full opportunity for matters to be understood and resolved. Legitimate, appropriately conducted monitoring of an employee's behaviour or job performance does not constitute unfair treatment/bullying and instead seeks a collaborative way of working to reach the necessary standards required.

3.2 Loreburn's Responsibilities

Loreburn will:

- Ensure that all employees receive appropriate induction training including new starts, those who have transferred to a different role and those who have been promoted.
- Set performance management objectives for individuals and teams that are in line with Loreburn's aims and objectives, ensuring that all employees understand how performance in their own role impacts on the performance of the organisation as a whole. These objectives will include measurable targets, outcomes and milestones as appropriate.
- Ensure that all employees fully understand their role, the standards that are expected and how performance is measured and reviewed.

- Provide appropriate training so that all employees can fulfil their role and meet the expected standards which their job demands. This will include a mix of role specific and organisational training activities.
- Closely monitor and support staff during their probationary period ensuring guidance, clarity and additional training as appropriate in order to identify any performance issues at an early stage.
- Ensure that line managers evaluate individual performance through regular 1:1 meetings with their staff. Such regular meetings should focus on developing the strengths of individuals, as well as addressing their improvement areas through an open and constructive discussion. The frequency of such 1:1 meetings are held every 6-8 weeks.
- Evaluation of team performance will be reviewed through regular team meetings. Such regular team meetings should focus on developing the strengths of teams, as well as addressing their improvement areas through an open and constructive discussion.
- Identify individual learning and development needs: informally during any discussion with line managers, through regular 1:1 meetings with line managers and through an individual annual performance exchange/appraisal meeting.
- Identify poor or insufficient performance as early as possible. Line managers will discuss the situation with the individual, leading to the establishment of an Improvement Plan which sets clear, timed, targets which will be monitored in order to demonstrate improvement.
- Discuss poor team performance with team members, at a team meeting. An action plan will be drawn up setting clear, timed, targets which will be monitored to demonstrate the team's improvement.
- Recognise good performance – both individual and team.
- Implement the Disciplinary Policy where poor performance continues following an initial Improvement Plan and no, or insufficient, improvement is seen. This could lead to a formal warning being issued to an employee, or ultimately dismissal of the employee, as per the Disciplinary Policy.

3.3 Line Manager's Responsibilities

It is the responsibility of all Line Managers to ensure that performance management activities are implemented for each of their team members. Any documents related to 1:1 discussions and Individual Reviews should be retained by the manager and copied to the P&C team for inclusion into employee records

3.4 Employee's Responsibilities

All employees are expected to adhere to Loreburn's GREAT Values and conduct themselves in a professional manner. During the course of employment, there may be occasions when performance falls short of the expected standards required. In such circumstances, employees are obliged to work with their line manager to resolve matters at an early stage. We learn, grow and at times have to change to achieve success. Successful performance management therefore requires the buy-in of both parties to move forward constructively together.

3.5 The Performance & Development Review System

In the event of performance expectations not being met, and not being addressed via 121 discussions, the Manager will arrange to meet with the member of staff to discuss the areas of concern. A Performance Improvement Plan will be agreed with clear outcomes and timescales. The timescales must allow sufficient time for the individual to demonstrate improvement. The Plan should be submitted to P&C for sign off.

4. EXAMPLE PERFORMANCE IMPROVEMENT PLAN (PIP)

PERFORMANCE IMPROVEMENT PLAN

Employee:	Line Manager:
Also present at meeting:	Date of Review:

Relevant documents

- Job Description/Role Profile/Person Specification
- Most recent Performance and Development Review Forms
- Tangible evidence/examples of performance

What is going well and needs to be maintained

Requires Improvement

Observations (of performance or behaviours)	
What could be the root cause of the issue?	
Standards/Expectations for the future (in progressive stages if required). Make these specific & measurable (SMART)	
Support / Training required if necessary (and how this will be arranged)	
Progress check	
Next Review Date	
Consequences if expectations are not met: If sufficient improvements are not made the matter will be dealt with in line with the Disciplinary Policy	
Additional Comments by Manager	
Additional comments by employee:	

Employee Signature:

Date:

Manager Signature:

Date:

A copy of this document is required to be saved in employees PeopleHR record under case log

5 Complaints

Loreburn has a commitment to valuing complaints and ensures the organisation benefits from feedback to identify areas for change or improvement.

Loreburn has a Complaints Policy which ensures there are robust and effective procedures in place for complaints to be properly managed and acted upon.

Anyone dissatisfied with the outcome of their complaint having exhausted Loreburn's complaints procedure has the right to refer the matter to the Scottish Public Services Ombudsman.

6 Equality, Diversity & Inclusion

Loreburn aims to ensure that equality, fairness, dignity and respect are central to the way we work and how we treat our customers. We support diversity and uphold equal opportunities in all areas of our work as an employer and service provider.

Loreburn will not discriminate against tenants, staff, visitors, suppliers or others based on their age, sex, sexual orientation, race, disability, religion or belief, marital status, pregnancy and maternity or gender reassignment (collectively referred to as 'protected characteristics' in the Equality Act 2010).

7 Risk Management

Loreburn has a Risk Management Strategy, Policy and Procedure. These documents set out how the organisation will manage risk as an integral part of its governance and management systems, ensuring risks are identified, evaluated and controlled effectively.

Identifiable risks arising from this policy will be monitored and managed by the internal processes set out herein and by regular review of this and all other associated policies and procedures, ensuring risks are mitigated and Loreburn complies with all legislative requirements and regulatory and best practice guidance.

8 Responsibilities chart

8.1 The chart below illustrates the responsibilities of all staff pertaining to this Policy:

Responsibilities	Man. Comm	CEO	LET	Head of Service	Team Manager	Staff
Approve Policy	X			X		
Lead by example in application of policy	X	X	X	X	X	X
Take proactive steps to resolve issues						X
Take ownership of concerns and seek to resolve at an early stage						X

9 Policy review

9.1 The Policy Champion is the Director of Corporate Service

9.2 This Policy will be reviewed every three years or sooner as required due to legislative or substantive change.