

STAFF PERFORMANCE REVIEW POLICY

INTRODUCTION

The purpose of the performance review is to benefit staff and the Chester Diocesan Board of Finance alike. It reviews staff performance, helps to develop and monitor staff, and gives two way feedback on how the work is progressing and where improvements could be made by both the employee and in the working practices of the Chester Diocesan Board of Finance. The scheme aims to provide those being reviewed with a formal opportunity to present what they feel have been their main achievements over the past year, to discuss their performance in general and to make plans for the year ahead. The scheme is a highly participative one, with a great deal of emphasis on self-appraisal, ensuring that staff have a major role in determining their own development. It is also concerned with the future – setting objectives and improving performance.

Performance reviews are undertaken for all staff by their supervisor, line manager, director or the Diocesan Secretary in order to review their individual performance and development needs.

Reviews will normally be carried out for staff at the end of their probationary period and annually thereafter. Reviews may be carried out at more frequent intervals if, in the opinion of the supervisor, line manager, director or Diocesan Secretary this would be beneficial. In addition, an objective setting meeting should be held by the supervisor, line manager, director or Diocesan Secretary for all new recruits within the first four weeks of starting work.

Reviews will be made in accordance with these guidelines using the documents in the standard format provided. This documentation may be updated and amended as required from time to time.

DEFINING PERFORMANCE & DEVELOPMENT REVIEW

A review is made on a staff member's performance, and needs for training and development considered on the basis of a job description and objectives previously agreed. Without an up-to-date job description and defined objectives, the employee has no clear idea of the job and what is expected, and neither has the supervisor, line manager, director or Diocesan Secretary. In this case the review cannot be carried out until the job description has been up dated and agreed. The job description can be altered as needed from time to time as the job varies in order to meet the objectives set.

A review is an objective discussion of an individual's performance against a job description and the agreed objectives set at the previous review or at informal coaching sessions. It will consider an individual's strengths and achievements as well as any areas there may be for improvement and personal development. It should recognise above average performance, and where performance is below the expected standard, any discussion should focus on reasons and solutions. The review will include both the supervisor, line manager, director or Diocesan Secretary's assessment of performance and the individual's self assessment. During the review

the reviewer and reviewee will agree objectives for the next 12 months as well as recording any training needs. There should not be any surprises at a formal review; these should be avoided by having a continuous monitoring of performance throughout the year by including regular coaching sessions for all staff members. This will ensure that the formal review meeting is a summary of the past 12 months' discussions and actions taken, which can be reviewed before considering the future. There should be time to consider the employee's aspirations and opportunities for development.

The objectives agreed for the coming 12 months should be recorded formally on the review form and the signatures of the employee and the supervisor, line manager, director or Diocesan Secretary obtained. A copy of this document will be placed on the employee's personnel file. It should also be kept and regarded as a working document by both the employee and the supervisor, line manager, director or Diocesan Secretary.

The Chester Diocesan Board of Finance will use the Review Procedures to increase effectiveness, to improve communication, to enhance job satisfaction and identify training and development needs where this may be appropriate.

Subjects that should be part of the Disciplinary, Grievance or Appeals Procedures are not appropriate for discussion or inclusion in a Performance Review. A Performance Review must not be seen as an opportunity for addressing disciplinary behavioural issues.

DOCUMENTATION

Each employee is to receive a Self-Review Questions sheet prior to their Review interview. These questions will form the primary discussion points during the interview.

The agreed objectives will be written onto the Review Form which will be signed by both the employee and the supervisor, line manager, director or Diocesan Secretary. Three copies will be made: one for the employee to keep for their personal record; one for the supervisor, line manager, director or Diocesan Secretary to keep to monitor the level of progress; and the final copy will be forwarded to Human Resources to keep on the employee's personnel file.

EVALUATION

The review process will be evaluated to ensure that relevant on-going training can be provided as well as any teething troubles resolved.

SUMMARY

Review of every member of Chester Diocesan Board of Finance staff should be seen as a valuable tool for the development and motivation of employees to achieve their maximum potential and to highlight methods of working which could be improved.

Review Form

Name of employee	
Name of reviewer	
Department	
Date of Review interview	

1. Review of past year:

Were any specific objectives agreed last year?
What has gone well about the job overall?
Were there any areas where there is a need for the DBF / reviewer / reviewee to improve/develop/change? If so how do we address these areas?

2. Review of Training and other development agreed in the previous review.

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3. The DBF has at its core a Christian ethos as motivation for all its work. We hope that this gives us a strong identity and culture and welcome any feedback.

Are there any examples given or suggestions of what we could do better?
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4. Are there any specific objectives for the year ahead?

Objective	Steps needed to achieve this objective (if appropriate)	Date for completion

5 . What training and other steps of development have been agreed?

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6. Team work: how has the work of the reviewee impacted on the work of others who work closely or in a similar area of work?

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7. Action to be taken by:

<i>a. the reviewee?</i>
<i>b. the reviewer?</i>
<i>c. others in the organisation?</i>

8. Any other comments?

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Signed as an agreed record:

Signed by employee		Date	
Signed by Reviewer		Date	

Please forward the original copy of this form to Human Resources

Self Review Questions

Name: _____

Department: _____

It would be helpful if you could think about your job over the last year, how well you have been able to meet your objectives and to provide any relevant evidence of your progress. There are some questions below which you may find useful to help you remember some specific points.

1. Briefly list the main responsibilities of your job, and roughly what percentage of your time is spent on each.
2. Looking back to the objectives agreed at the last review, which ones have been exceeded, met and not achieved? Give information of the evidence you have based these assessments on.
3. What do you feel you have done particularly well over the last twelve months?
4. What do you feel you have done least well over the past twelve months?
5. To help improve your performance in the job still further what additional steps could be taken by you, your line manager or others in the organisation?
6. What do you think are your principal objectives for the year ahead?
7. What changes, if any, in your responsibilities would you like to see in the near future?
8. What training and other steps could be taken to further your job / career development?
9. Are there any difficulties relating to a disability or issues in your work life balance, home life or that impact on your job.
10. Is there anything else you wish to raise in the review?