Staff Appraisal Policy

Document Control

Responsible Person	Chief Executive			
Review Frequency	5 Yearly			
Reviewed by	Board			
Date Approved	April 2023			
Next Review Due	April 2028			
Consultation Required	Yes	✓	No	
Equalities Impact Assessment	Yes	✓	No	
Added to Company Website	Yes	✓	No	
Associated Documents Considered	Yes	✓	No	

1. Introduction

1.1. Waverley Housing operate a system of Staff appraisal. Waverley Housing acknowledges that any form of appraisal will be carried out as a “gentle" exercise. It will be used not only to appraise Staff but also to evolve a set of standards against which each member of Staff's performance can be measured. These standards will vary from member of Staff to member of Staff.

2. Purpose

2.1. Waverley Housing measures certain performance indicators against targets in the areas of Finance, Housing Management, Repairs and Maintenance. It is a logical next step to formally review the performance of Staff too. Working relationships and work performance should be improved if all members of Staff know the standards expected of them and how these can be achieved.

2.2. Regular reviews will provide an opportunity to review job profiles, plan training and consider prospects for future promotion where appropriate. However, it must be clearly understood that this appraisal system is not salary based e.g. high performers will not have their salaries increased, poor performers will not have their salaries reduced.

2.3. There are a number of basic questions to which Staff need to know the answers, and which are not always fully answered in day to day working relationships:

a) Who am I accountable to?

b) What is my job, and what are my functions?

c) What standards are expected of me, and how will I know if I am performing satisfactorily?

d) Where do I go from here, and what is my potential?

e) What training do I need?

2.4. The appraisal system will give Staff the opportunity to discuss such issues with their appraiser. The system will also form part of the process of target setting and review.

2.5. The greatest resource in any Company is its Staff. That resource should be monitored in such a way as to reflect its importance.

2.6. A system of formal appraisal does not mean that a Line Manager cannot point to and attempt to correct poor performance, or give praise when appropriate. This appraisal system gives a specific opportunity to interact with Staff as individuals and to consider each person’s overall performance, future development and training needs. Information gathered on training needs can be used in planning Waverley Housing’s training activities and policies.

3. Responsibilities

3.1. The Executive Team has overall responsibility for ensuring Staff appraisals are undertaken annually and in line with Company policy. The Executive Team is also responsible for

reviewing all completed appraisal forms and for authorising any training requests (where appropriate) in terms of Waverley Housing's Training and Development Policy.

3.2. Operational Managers are responsible for undertaking annual appraisals of Staff within their section and for identifying individual training needs.

4. Monitoring and Reviewing

4.1. The Staff Appraisal System will be reviewed every 5 years.

5. The Formal Appraisal System

5.1. The formal appraisal system will assess a Staff members' performance against standards for the job, and set goals for future achievements.

5.2. To be successful each individual must know:

a) the standards against which he or she is measured

b) that the aim is to develop and improve performance, not to criticise in a destructive way

c) that appraisal is based on whole performance over a specified period not a single event

d) that he or she has the chance to express a view

e) that areas where performance has been good will be discussed and agreed

f) that areas where improvement in performance is required, will be discussed and agreed

g) that training needs identified will be used to formulate an individual training plan whilst recognising that training plans will be fluid and may change during the course of any 12 month period

h) that a note of matters discussed together will be noted in the Employees personal file, and that he or she will have the opportunity to see his or her appraisal records and to have his or her comments noted in the case of disagreement

i) that Operational Managers will ensure any agreed action is actually taken.

6. Timetable

6.1. The Appraisal Scheme applies to all permanent Employees and will be held at least once every 12 months, unless in exceptional circumstances and the demands of the Board for management to carry out specific tasks, the Appraisal Scheme would then be suspended to avoid conflict arising from overstretched resources.

6.2. All new Employees will be appraised by their Line Manager following completion of a three-month probationary period and again at the end of their six month probationary period. This will identify if their performance is satisfactory or if action is required. In such instances, the probationary period may be extended.

6.3. In special circumstances, staff appraisals may be suspended at the discretion of the Executive Team either individually or collectively. This will be for a pre-determined period (after consideration of workloads and special projects) and thereafter, will resume as if the process had been continuous.