Human Resources
Goireasan Daonna

Employee Review & Development Guidance

Neach-obrach Lèirmheas & Leasachadh Stiùireadh

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Clàr-innse

Section 1: Introduction

The Highland Council is committed to improving the job satisfaction, potential and performance of all our staff. To support this commitment all staff will benefit from a personal Employee Review & Development (ERD) Plan and receive regular reviews and feedback from their line manager throughout the year. This approach aims to support improved personal and career development. The ERD planning process will be managed on an annual basis to support service planning and cascaded by managers starting in July and ending in September in each year.

Teaching Staff

For teaching staff development planning is slightly different. Teachers complete the PRD process through Gateway. The Highland Council mandatory training units hosted on Traineasy should be completed by teachers, with time agreed with their Head Teacher.

Staff who maintain GTC registration while working in a corporate (non-teaching role) may be required to complete the ERD process in addition to their PRD.

It will be assumed that 100% of teachers are compliant with their PRD. A summary report from Gateway will be analysed along with the Traineasy report by Learning and Development for annual reports on PRMS.

The Employee Review and Development (ERD) process will:

- Identify any health, safety and wellbeing issues affecting the employee in their job role and work environment
- Clarify the employee's workload and establish their main work tasks until the next Review
- Identify the skills required to perform effectively in their job roles
- Agree any training and development needs to enable the employee to perform effectively
- Provide honest feedback on good work performance, clarify expectations and identify and resolve causes of under performance
- Provide an opportunity to discuss any other issues relating to the job role, including future plans
- Assist with the development of Service Learning and Development Plans and Succession Plan

The **ERD process has 3 main stages**
- Staff Induction
- Annual Employee Review & Development Plan
- Regular review

Section 2: Induction

All staff must receive an induction on starting employment with the Council or when moving to a new job. The corporate induction checklist provides guidance on what should be covered. Services should add any specific requirements for each role.

During the induction period the manager will explain the ERD and annual review arrangements, key dates and how to access resources. These will be based on the requirements of the job and the individual employee.

Section 3: Annual ERD Planning Meeting

The ERD plan will be agreed between the manager and employee once a year. It includes an annual ERD meeting which will be cascaded from the Chief Executive starting in July, with all employees having had their ERD by the end of September in that year. In addition, as a minimum, there will be one review meeting each year during January to March.

The ERD meeting involves an assessment of progress during the previous year and planning for the year to come.

To guide planning and discussions employees and their managers should refer to the Council's values and behaviours set out in the organisational framework and competency frameworks relevant to their role. There are two competency frameworks: one for employees and one for managers.

The annual ERD meeting will be a face-to-face meeting between the employee and their manager. The outcome of the ERD meeting is to identify and agree actions to be addressed in the coming year focused on the following topics:

- Occupational Health, Safety and Wellbeing
- Workloads and Objectives
- Skills & Development
- Performance
- Future Plans

The following examples may be useful in guiding discussions on each of the topic areas to be discussed at ERD.

Occupational Health, Safety & Wellbeing

- Health & safety requirements (including mandatory training; insurance and driving licence checks)
- Issues from job role/workplace risk assessment (remember risk assessment and adjustment for pregnant staff)
- Health issues (adjustments for disability or other needs)
- Attendance at work
- Working relationships including those with clients and contractors
- Workplace stressors
- Working environment and facilities
- Role of Mental Health Representative

Workload & Work Objectives

- Work plan and actions from last review, including progress on targeted outputs
- Next period's work plan
- Workload management (address level of workload – insufficient, sufficient, too much)
- Changes to working practices affecting work (procedures, organisational developments, standards, legislation)
- Any support issues arising

Skills and Development

- Progress with role specific requirements
- Changes to skill requirements (as a result of new tasks, changes to working practices etc.)
- Training and development required (as a result of new Delivery Plan, issues discussed in Health, Safety & Wellbeing; Workload and Work Objectives and Performance)
- Gaelic language development

Performance

- Progress against targets and expectations
- Honest praise for work completed well
- Lessons learned and areas for improvement
- Professional practice and standards
- Assessment of values and competencies

Future Plans

- Future work developments likely to impact on the employee
- Employee plans or aspirations that might likely to have an impact in the workplace

Section 4: Template ERD Form

A template ERD form has been designed as a word document – to be used until an electronic form is developed - to support ERD planning for the majority of employees. Service and job specific forms can be developed and made available where appropriate.

Step 1
The manager should arrange an initial discussion with the employee to agree the time, date and venue for the ERD meeting and to refresh their understanding of the process.

Step 2
Before the ERD meeting the employee and their manager should both spend some time thinking about:

- The Council's values and the competencies expected of both the employee and their manager
- the employee's job role and the actions agreed at the previous ERD meeting and subsequent reviews
- any expected future changes
- anything else that may be important to discuss

Step 3
Prior to the ERD meeting the manager should complete the cover sheet and send the form to the employee along with either a copy of the induction checklist (new employee) or a copy of the previous year's action plan and review updates.

It is recommended to keep written responses brief as points can be expanded during the meeting as required.

Step 4
The employee should:

- check cover page details are correct
- answer the six questions in section 1: the self-assessment
- section 2 and 3, consider their performance and development in relation to the Council's values, competency framework and potential development need
- return the form to the manager at least one week before the meeting date

Before the meeting the manager should review the employee's comments and make notes for discussion.

Step 5
At the meeting the employee and their line manager will discuss:

- section 1 questions and add managers notes
- section 2 - content to be recorded relating to the Council's values and competencies
- section 3 - agree and note actions for health, safety & wellbeing; workload & objectives; skills & development requirements; performance and future plans.

Training needs should be identified against the employee's current job requirement; with opportunities agreed by the manager. Options may include self-directed learning, on-the job training, in-house courses, e-learning or external options.

Career progression and succession planning can be discussed with the manager.

Both the line manager and employee check and sign the form. The line manager retains a copy in the employee's file.

The ERD plan should be regularly referred to as part of work planning, providing support for the employee.

The development activity agreed in the ERD form will provide the basis for the review meeting.

Step 6

As part of the Councils improvement priorities, you are asked to record that you have had your annual ERD. You are not asked to record the detail of your plan, just to confirm it has been completed. To do this:

- logon to Traineasy

- select Course Catalogue

- select mandatory training all staff

- select ERD

- select the 'quiz' activity

- click Yes.

The 'quiz' activity has been configured to automatically send all employees and their managers a reminder email when their next ERD is due.

Depending upon Service arrangements, your ERD outcomes (your personal development priorities) may be passed to your Service training representative.

Section 5: Review Meetings

All staff should receive a regular ERD review. However, the format, frequency, focus and documentation for the review should be determined by the job role. The content of the review should be recorded using the template Review Form or an alternative Service document more appropriate to the job role. Not all topics need to be discussed at each review. Discussion should focus on the issues most relevant to the employee and the job role at the time of the review.

The review can be delivered via a telephone discussion, a group briefing or with an employee in a face-to-face discussion. At the beginning of the meeting the line manager should explain that the purpose of the discussion is to carry out a review as agreed in the employees ERD Plan.

Where an existing procedure for supervision or review is in place this will continue to be used where appropriate. Staff must be clear, however, on what review arrangements apply to their job role.

Section 6: Skills and Development Needs

Development needs can be met in a variety of ways including:
- Mandatory, professional and personal development e-learning modules, webcasts and video resources on Traineasy
- Short courses (delivered by either internal or external providers)
- Coaching
- Mentoring/supervision sessions
- Open learning (paper based with support or computer based)
- Blended learning (e-learning and support workshops)
- Reading
- Secondments and Shadowing
- Formal qualifications (vocational qualifications, HNC etc.)

Learning & Development (L&D) provide advise on appropriate development methods and training providers, including organising First Aid Training for all Council departments through the approved supplier.

Training resources, such as Toolbox Talks and briefing sessions are provided for employees who do not have access to Council systems.

L&D deliver a range of SVQ qualifications and funding for qualifications for Modern Apprenticeship and Graduate Apprenticeship pathways.

Section 7: Reporting and Summary

Managers can view completed mandatory training modules in Traineasy on their Manager Dashboard and use this report to review progress when required.

L&D will report on number of completed ERD's (by Service) and share this quarterly with Executives and Senior Management teams. Progress will be recorded against targets in the Councils QPR portal.

In summary:

- A full ERD planning meeting should take place annually between July and September. In circumstances where a manager has not had their own ERD they should follow up with their manager to enable the process to cascade.
- Regular reviews should be carried out with staff at a minimum of 6 months, but this may be earlier or more frequent depending on the employee and their job role.
- Any changes to any of the focus areas e.g. work objectives, additional skills or development needs can be identified and updated during these reviews.
- Dates of induction meetings, annual ERD meetings and review meetings should be recorded by managers and reported to their Service on a quarterly basis.

Useful Links

Council Priorities	[**Click Here**](#)
ERD (policy, competency frameworks, forms etc)	[**Click Here**](#)
HR Microsite	[**Click Here**](#)
Induction information	[**Click Here**](#)
Learn Microsoft	[**Click Here**](#)
Occupational Health, Safety & Wellbeing	[**Click Here**](#)
Learning & Development - email	[**Click Here**](#)
Learning & Development - Microsite	[**Click Here**](#)
Modern Apprenticeship Centre	[**Click Here**](#)
Traineasy LMSx – e-learning platform	[**Click Here**](#)