Isaac works in a library. Recently, his line manager, Jennifer, has noticed a few issues in Isaac’s performance. He has been making errors with data entry and is putting books and resources back into the wrong places.

Jennifer has addressed these issues before with Isaac but in an informal manner. Now, Jennifer wants to go down the Managing Performance formal procedure. By addressing these performance issues with Isaac when they were occurring, she was making Isaac aware of his poor performance and giving him the opportunity to improve or raise any concerns. If she had not done this, the formal Managing Performance procedure would have come as a surprise to Isaac and may have been unnecessary.

To start the process, Jennifer speaks to Isaac to make him aware that she is following the formal Managing Performance procedure and that she will invite him to a meeting in writing.

Jennifer emails HR with Isaac’s name, details and a summary of the performance issues so that this can be logged.

Jennifer finds the template letter on HR Anytime, completes the letter with the appropriate details and sends it to Isaac detailing the date, time and location of the meeting and advising him of his right to representation.

Jennifer selects a day that Isaac is working and in a room in the library where nobody can see into their meeting. If there was not an appropriate room, Jennifer would have found an alternative location.

At the meeting, Jennifer completes the Performance Improvement Plan template, found on HR Anytime.

Jennifer points out Isaac’s performance issues, one by one. Jennifer explains them clearly, simply and uses specific detail so that Isaac knows exactly what the issues are.

1. On a number of occasions you have not input the correct details for our collections into the library database, making typo errors with reference numbers and author names. In the last 2 months, there have been 20 occasions of this.
2. On a number of occasions you have placed items from our collections in the wrong area of the library which makes it difficult to re-find them. In the last 2 months, there have been 10 occasions of this.

At this stage, Jennifer reminds Isaac that this is not a disciplinary investigation. Managing Performance is a supportive process and the main purpose is to help Isaac improve.

Jennifer checks Isaac’s understanding.

Next, Jennifer goes through the expected performance standards, again clearly, simply and with specific detail.

1. Details of our collections should be input correctly and double checked on the library database.
2. Items should be placed in the correct area of the library at all times. If you are uncertain, they should be held at reception until their correct location is identified.

Jennifer checks Isaac’s understanding and asks if Isaac has any comments or questions about what she has mentioned. Isaac tells Jennifer that he sometimes has difficulty reading the details of items due to poor eyesight. Isaac also tells Jennifer that he feels stressed about being slower than other colleagues so often tries to rush, which results in him getting things wrong.

Jennifer thanks Isaac for his honesty and moves on to suggest some support that Isaac might benefit from:

1. A referral to occupational health to discuss his eyesight and reasonable adjustments for this.
2. Additional time and temporary relief from less important duties to be able to get work done accurately.
3. Stress workshops organised by HR.
4. A meeting to discuss a stress risk assessment.
5. Offered the contact details for Time for Talking.

Jennifer advises Isaac that his performance will be reviewed and that they will set measurable, realistic and specific targets to be able to determine if Isaac’s performance improves or not:

1. The inputting of incorrect details into the library database reduced to 1 occasion per month on average maximum.
2. Items placed in the wrong area of the library reduced to 1 occasion per month on average maximum.

Jennifer and Isaac agree that a 3-month review period would be appropriate so that this gives time for Isaac to make use of the support mentioned and to allow this to be implemented and take effect. However, Jennifer would be meeting with Isaac once a week to go over any concerns they both have.

Jennifer uses the template letter on HR Anytime to send a copy of the performance improvement plan and a summary of the discussion to Isaac.

Jennifer uses the template letter on HR Anytime to invite Isaac to a review meeting. Over the past 3 months, there have been significant improvements but Isaac hasn’t met all of the targets set out in his performance improvement plan.

Occupational health suggested that Isaac gets specialist equipment for his eyesight and Jennifer and Isaac worked with Access to Work to get this. Details about Access to Work were available on HR Anytime. Isaac also attended his stress workshops, spoke to Time for Talking and attended his stress risk assessment meeting.

At the Managing Performance review meeting, Jennifer discusses the performance improvement plan with Isaac and discusses the targets that were set. Jennifer advises Isaac that the 1st issue has been resolved and Isaac has only had 2 occasions of inputting incorrect data into the library database over the last 3 months. Therefore, this was being removed from his performance improvement plan as Jennifer is now satisfied with his performance in that respect.

However, Jennifer then makes Isaac aware that while over the last 3 months he has improved on getting collections into the right area of the library, there were still 6 occasions of this. Therefore, Jennifer advises Isaac that he is moving on to Stage 2 of the Managing Performance policy.

Jennifer asks Isaac if there is any other support that he feels he might require that they can try. Isaac admits to Jennifer that the library has changed layout several times over the last year and ever since returning from leave, he has struggled to keep track of where everything is.

Jennifer suggests that:

The library creates a map of library areas and updates this whenever there are changes. Isaac would still have extra time in his duties to ensure he is being accurate.

Isaac agrees that this would be useful. Jennifer makes a note of this on the performance improvement plan and also starts the Record of Stage 2. The template of this was found on HR Anytime.

Jennifer and Isaac agree on the same target and agree that 10 weeks would be a sufficient review period. Initially, Jennifer suggested 2 months but amended this as Isaac had 2 weeks’ annual leave booked.

Jennifer uses the template letter to formally advise him that he has moved to Stage 2 of the Managing Performance policy and invite him to the Stage 2 review meeting.

Over the next 10 weeks, Isaac has been using the maps of the library and this has resulted in zero placement errors.

At the Stage 2 review meeting, Jennifer advises Isaac that he has improved to the required standard and that he would return to normal monitoring. However, Jennifer advises Isaac that if his improved performance is not sustained over the next 12 months, he will come back into the Managing Performance policy at the stage he left.

Jennifer completes the performance improvement plan and Record of Stage 2 and sends an outcome letter to Isaac. The template for this was found on HR Anytime.

Jennifer then sends all of the paperwork to HR for saving.