

REPORT TO: TAYSIDE VALUATION JOINT BOARD – 28 JANUARY 2013
REPORT ON: EMPLOYEE PERFORMANCE AND DEVELOPMENT REVIEW
REPORT BY: ASSESSOR
REPORT NO: TVJB 6-2013

1 PURPOSE OF REPORT

1.1 To seek approval for a revised Staff Development Review to be implemented within Tayside Valuation Joint Board.

2 RECOMMENDATIONS

2.1 It is recommended that the Board approves the replacement for the Staff Development Review: Employee Performance and Development Review. The Employee Performance and Development Review outline and Skills and Knowledge framework are attached in the appendix to this report.

3 FINANCIAL IMPLICATIONS

3.1 None. The resultant agreed training needs will be resolved within the Board's Revenue Budget.

4 POLICY IMPLICATIONS

4.1 This report has been screened for any policy implications in respect of Sustainability, Strategic Environmental Assessment, Anti-Poverty, Equality Impact Assessment and Risk Management. There are no major issues.

5 BACKGROUND

5.1 At its meeting on 9 May 2005 the Board approved the introduction of a Staff Development and Appraisal Scheme.

5.2 A review of the current Staff Development Review Scheme has identified areas where it no longer satisfies the specific needs of Tayside Valuation Joint Board.

5.3 The Assessor's Staff Development Review has been reconsidered in conjunction with Dundee City Council Human Resources staff. This comprehensive review has included discussions with the Assessor's Management Team, formal and informal interviews with staff members and a discussion workshop involving a broad section of staff.

5.4 The discussions, interviews and workshop informed the format of the replacement for the Staff Development Review scheme and the manner of its implementation, and will contribute to its operation. The replacement is based on the sound principles adopted by Dundee City Council Human Resources department in a review of schemes adopted by Dundee City Council, however the replacement scheme has been designed to be specific and relevant to the needs of Tayside Valuation Joint Board.

- 5.5 The replacement for the Staff Development Review: the Employee Performance and Development Review seeks to identify staff skills and knowledge needs and required support within a framework of the Organisation's goals and job requirements. The skills and knowledge needs will be informed by the Tayside Valuation Joint Board service mission and vision and corporate aims and objectives, the job requirements and skills and knowledge framework. The Employee Performance and Development Review, in addition, includes feedback within the review which is intended to assist Organisational learning.
- 5.6 Guidance for all Staff requires to be developed in partnership with our Human Resources advisors and briefings and training undertaken in each office to clearly communicate the purpose of the Employee Performance and Development Review and provide guidance on the preparation for review meetings, conduct during the meetings and on the process to resolve outcomes arising from the review meetings.
- 5.7 The Employee Performance and Development Review scheme will be based on an annual review meeting which is not intended to be a replacement for day to day support and supervision but should enhance the existing support and supervision. The annual review meetings may surface issues however the planned training and guidance will highlight the need to deal timeously with disciplinary matters or complaints outside the review process.
- 5.8 The Employee Performance and Development Review has been developed to be viewed as a process and it is intended that the scheme will embed into the routines of the Organisation as an essential ingredient in achieving the aims and objectives of the Organisation. Part of the process of the Employee Performance and Development Review will be to re-examine the Review to ensure that the desired outcomes for the Organisation are achieved.

6 CONSULTATION

- 6.1 The Clerk and Treasurer to the Board, together with the Head of Human Resources, Dundee City Council, have been consulted in the preparation of this report.

7 BACKGROUND PAPERS

- 7.1 None.

John M Galbraith FRICS
Assessor

January 2013

TAYSIDE VALUATION JOINT BOARD

Employment Performance and Development Review



Explanation Sheet

The main page of the Employment Performance and Development Review will be utilised to cover the aims and objectives of the Organisation, job requirements and skills and knowledge needs. The page will be repeated within each Staff member's review to cover every business area of Tayside Valuation Joint Board.

The Overall Heading identifies the area under consideration, such as Customers or Communication.

The Statement directs the focus of the review to question what is required to achieve the goals.

The goals are the identified desired outcomes and the measures are the observable actions required to achieve the goals.

The goals or measures may be set within a time frame, greater or shorter than the review period, similarly the knowledge and skills development need or action arising from the feedback may be set within a time frame.

The required knowledge and skills are simply the identified knowledge and skills required to carry out the actions to achieve the goals. The review procedure will identify where the knowledge and skills require development to achieve the goals of the Organisation and requirements of the job.

Feedback is to cover areas where the Staff member's performance relies upon external factors and this allows comment on this influence. The feedback also allows for discussion on areas where the Organisation can learn, innovate and improve.

The Skills and Knowledge Needs summary page allows the Skills and Knowledge needs from the various headings to be brought together. The summary may identify common areas of skills and knowledge needs.

The Development Plan is designed to list the agreed action and target dates for this action. The range of training opportunities are such that the Development Plan may not be finalised until after all training needs are identified.

The Feedback summary, in a similar vein to the Skills and Knowledge summary, brings together all identified feedback items. The feedback action may not be finalised until all reviews have been completed and considered by the Management Team.

The Training Record is to allow each Staff member to keep an individual record throughout the year which will inform discussions at review. It may be of benefit to members of professional organisations to illustrate cpd hours.

The sheet titled 'Any other points discussed but not covered elsewhere' is to allow a note to be kept of any pertinent matter. This may be personal to the Staff member's review or may be a general comment on the Organisation. This may inform the conduct of future reviews or allow the Organisation to learn from shared experience.

The Service Mission and Vision is included to inform the Overall Heading, the Statement and the direction of each review. It will also inform the Skills and Knowledge needs to achieve aims and objectives contained within the Service Mission.

It is intended that each Staff member's job description will form part of the Review documents to inform the Skills and Knowledge needs.

The Skills and Knowledge framework will inform the skill and knowledge needs within the review. The list is not exhaustive and the framework itself will be expanded and altered by the reviews.

Employee Performance and Development Review



Name:	Review carried out with:
Position:	Position:
Date of Review:	

OVERALL HEADING	STATEMENT		
<u>Goal</u>	<u>Measure</u>	<u>Required Knowledge & Skills</u>	<u>Knowledge & Skills Development</u>
FEEDBACK -			

SKILLS AND KNOWLEDGE NEEDS SUMMARY

DEVELOPMENT PLAN

ACTION AGREED

TARGET DATE

Your Signature:

Date:

Manager's Signature:

Date:

FEEDBACK SUMMARY

FEEDBACK

ACTION AGREED

TARGET DATE

Your Signature:

Date:

Manager's Signature:

Date:

TRAINING RECORD

TRAINING

DATE

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ANY OTHER POINTS DISCUSSED BUT NOT COVERED ELSEWHERE

TAYSIDE VALUATION JOINT BOARD

Employee Performance and Development Review



SERVICE MISSION & VISION

Tayside Valuation Joint Board's **mission** is to ensure best value and provide equitable, customer focussed, high quality, professional valuation and electoral services for all its stakeholders.

Our **vision** is to provide valuation and electoral services in accordance with statute and in a manner that is exemplary.

AIMS & OBJECTIVES

In order that we fulfil our mission and achieve our vision we will:-

- Ensure that our services are delivered in accordance with all statutory requirements.
- Plan service development and delivery in accordance with the principles of Best Value and continuous improvement.
- Take individual and collective responsibility for the services provided.
- Encourage innovation and recognise achievement within the organisation.
- Monitor and report performance levels to stakeholders.
- Integrate Equalities issues into all aspects of our service provision.
- Build on our achievements to date.

Key corporate objectives

- 1** To ensure timeous publication and maintenance of the **Valuation Roll**
- 2** To ensure timeous publication and maintenance of the **Council Tax Valuation List**
- 3** To ensure timeous publication and maintenance of the **Register of Electors**
- 4** To continue to maintain, improve and develop **Information Technology systems** to assist in delivering services
- 5** To set standards and undertake improvement in **service delivery**
- 6** To review roles, **responsibilities and procedures** to ensure effective balance of power and authority
- 7** To review, monitor and maintain **risk management** and internal controls
- 8** To develop, adopt and review formal documentation and put in place appropriate systems to ensure **compliance** to legislation and standards of conduct
- 9** To plan and deliver an **organisational development strategy** to ensure efficiency and quality of service delivery
- 10** To ensure the **Health & Safety** of staff and visitors
- 11** To publish information to ensure improved **customer focus**
- 12** To engage in **key partnership working** to ensure the delivery of efficient government

SKILLS AND KNOWLEDGE FRAMEWORK

The Skills and Knowledge framework is based on a framework used by Dundee City Council to inform their Employee and Performance Review. The framework has been discussed with representatives of the Assessor's offices and amended following these discussions to reflect the specific needs of Tayside Valuation Joint Board.

Why have a Skills and Knowledge Framework?

- The key skills, knowledge and resultant behaviours listed are not exhaustive and the Development Reviews will highlight further key skills which will add to the Framework. The Framework alongside the Organisation Mission Statement and Job Descriptions will inform the skills and knowledge required to carry out our jobs successfully and will inform the skills and knowledge training needs.

In addition the framework will help to:

- Focus us to identify development needs.
- Help us understand skills, knowledge and behaviour required for all roles in the Organisation.
- Helps when planning careers.

ALL STAFF

1 CUSTOMER FOCUS

The Assessor has many and varied customers. We are committed to providing a reliable and accessible service. We are committed to listening and seeking the views of our Customers. The mission is to provide a high quality, professional valuation and electoral service and the Assessor will deliver this through achieving the stated aims and objectives, serving the needs of all customers, internal, external and partners.

Examples of Effective Behaviour - Customer Focus

- Display a positive impression.
- Display an understanding of customer needs.
- Deliver on promises made to customers.
- Ensure our customers are kept up-to-date.
- Respond timeously.
- Respond accurately.
- Act with diplomacy and tolerance.
- Value all customers.

2 TEAM WORK

Team-working within the Assessor's offices is essential within survey teams, clerical sections, headquarters and IT. Exercising team-working principles, additionally, is equally important throughout each office, between offices, in working groups and with partner Organisations. Teamwork is about recognising the contribution of others, respecting and accepting others views, listening, sharing ideas, and sharing skills and knowledge. Teamwork will assist the Organisation to succeed, to achieve individual, team and Organisation objectives.

Examples of Effective Behaviour - Team Working

- Consider team objectives before personal objectives.
- Build rapport with colleagues.
- Support colleagues.
- Show respect to colleagues.
- Be willing to assist and help at all levels.
- Input to the planning and decision-making process.
- Respect the diversity of colleagues and different viewpoints.
- Draw upon the full range of skills within your team.
- Share ideas, skills and knowledge.
- Be open to feedback.
- Offer constructive feedback in a way which makes it acceptable to others.
- Listen.

3 EFFECTIVE COMMUNICATION

Effective communicating with internal and external stakeholders is of vital importance. This skill reflects our abilities not only by communicating our point effectively, but also being able to listen and understand others views and work together to find a shared solution. Many of the other skills identified in the framework require effective communication and these identified behaviours are repeated in this section.

Examples of Effective Behaviour - Communication

- Display a positive impression to encourage communication.
- Be open, try to understand other viewpoints.
- Show respect.
- Communicate in a timely manner.
- Ensure communication is accurate and easily understood.
- Be clear and concise.
- Listen to clarify questions and issues.
- Avoid using jargon when explaining technical issues.
- Provide explanation when jargon is unavoidable.
- Be aware of effective behaviour in all forms of communication.

4 ACCOUNTABILITY

Being accountable means taking personal responsibility for all aspects of your work. This involves understanding the impact that decisions and actions have on all stakeholders.

Examples of Effective Behaviour - Accountability

- Complete tasks within timeframes.
- Be supportive to your colleagues and complete promised work.
- Admit mistakes and rectify them.
- Seek support when required.
- In carrying out instructions, verify your understanding.
- Re-clarify instructions should there be uncertainty.
- Be responsible, take responsibility.

5 TECHNICAL ABILITY

Technical ability relates to skills and knowledge that are required to do your job and this will differ between jobs. All staff are expected to display the technical ability applicable to their area of expertise. There are abilities common to all staff and all staff are expected to have a broad knowledge and awareness of the mission, aims and objectives of the Assessor.

Examples of Effective Behaviour - Technical Ability

- Apply your knowledge of procedures, computer systems and background legislation in processing your work.
- Maintain accurate records.
- Provide support on your area of expertise to colleagues.
- Display proficient technical skills and knowledge.

SUPERVISORS AND MANAGERS

1 ENGAGING, INSPIRING AND DEVELOPING OTHERS

People are key to the success of Tayside Valuation Joint Board. The ability to engage, inspire and develop your Team is vital. This involves being open and honest with your Team, developing staff through the development process, providing feedback, support and guidance, listening and accepting feedback.

Examples of Effective Behaviour - Engaging, Inspiring and Developing Others

- Provide clear and concise direction to staff within the Organisation's aims and objectives.
- Be approachable and encourage communication.
- Learn from Staff feedback.
- Challenge staff and be prepared to be challenged.
- Provide support and coaching to Teams.
- Set challenging but achievable objectives.
- Display understanding, build trust.
- Build on strengths, address weaknesses, support development of all Team members.

2 LEADERSHIP THROUGH SEEKING CONTINUAL IMPROVEMENT

The Assessor's organisation is experiencing, and responding to, change in all aspects of the work undertaken. To be successful, we require the whole organisation to be flexible and adaptable and view change as a positive step to improving services.

Examples of Effective Behaviour - Leadership through Continual Improvement

- Promote change as a positive process.
- Communicate changes to systems.
- Communicate improvement to our service.
- Display a consistent positive attitude to change.
- Encourage creativity and innovation with Teams.
- Introduce and deliver service improvements.
- Understand resistance to change, work with and explain necessary improvements.
- Work to embed improvements into the Organisation's routines.

SENIOR MANAGERS/MANAGEMENT TEAM

1 ACT AS A ROLE MODEL

The Organisation expects the leaders of the organisation to be role models. Leaders must lead by example and actively encourage and promote the values, aims and objectives of Tayside Valuation Joint Board. Role Models must be consistent and challenge when values are not being met.

Examples of Effective Behaviour - Role Modelling

- Always act with honesty and integrity.
- Always do what you say you will.
- Build trust throughout the Organisation.
- Accept feedback.
- Admit mistakes.
- Embrace value of openness and honesty.
- Lead by example in behaviour.
- Respect all staff regardless of position and grade.
- Project a strong public profile.

2 LEADERSHIP

Effective leadership is challenging ourselves against standards of excellence. This includes achieving Organisational aims and objectives and seeking continual improvements. Displaying leadership skills and promoting continual improvement ensures that the offices of the Assessor will build on its achievements and to evolve in a changing environment.

Examples of Effective Behaviour - Leadership

- Provide enabling structure to allow the Organisation to achieve.
- Define success criteria, targets and goals and communicate with the whole Organisation.
- Be clear about what needs to be delivered and achieved.
- Take ownership for improvements and targets.
- Tackle obstacles and problems and provide solutions.
- Build trust in the Organisation through positive action.
- Continue to review and re-assess objectives and goals to ensure they are challenging and meet the Organisation's requirements

TAYSIDE VALUATION JOINT BOARD

Employment Performance and Development Review



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- Continue to review and re-assess objectives and goals to ensure they are challenging and meet the Organisation's requirements