

Diocese of Elphin – HR Policy Handbook

Document Name: Managing Performance Policy
Document No: 9.1.1 (original)
Effective Date: 15th February 2019
Written By: Frank Mitchell, HR Advisor
Approved By: +Kevin Doran, Bishop of Elphin



Operating under the patronage of Our Lady of the Immaculate Conception, the Diocese of Elphin aims to provide staff members with a safe, caring and supportive Christian environment in which to carry out their work. Work objectives are to be advanced with due regard to the needs and dignity of each staff member and with due regard for the individuals and communities the diocese serves.

This document outlines the Diocesan policy on Managing Performance. It is applicable to parishes, offices, agencies and any entity operating under the governance of the Diocese of Elphin (hereafter referred to as “the employer”). Line Managers (Bishop, Priests, Deacons, Religious, Lay Personnel who supervise staff members) are responsible for communicating this policy and having it signed off by their staff member(s).

“The employer” strives to achieve high standards of performance and service at all times. It is our policy to train and support all staff members to carry out their roles to a high standard and to the best of their ability.

We aim to ensure that all staff members are engaged with and have a rewarding role and have opportunities to develop their potential, use their abilities and maximise their contribution. Continuous development is necessary to grow our capability at both diocesan and local level to operate successfully in a dynamic and changing environment.

Communicating, engaging and consulting with staff members are central to the success of “the employer”. Our performance process is one key element that can be used to demonstrate this on an on-going basis.

All staff members can expect to have ongoing performance conversations and receive timely and balanced feedback on their performance. Staff members will be supported to achieve the required high standard and should anyone face difficulty in meeting the standard expected there are further procedures in place to address this.

The Bishop, Priests, and all Line Managers are strongly committed to providing feedback and supporting staff members to raise performance standards. As part of their role, all managers are required to engage with their staff members in performance conversations, and where appropriate regular documented reviews.

Performance management process

The diocesan performance management process aims to support staff members to perform their role to a high standard, so that the diocese can achieve its goals.

This two-way continuous communication process translates goals into accountabilities, provides measures and feedback to assess progress against goals and identifies how we can improve individual and diocesan performance.

The success of the performance management process in the diocese is dependent on:

- having clear and aligned goals and objectives;
- a climate of development;
- recognition of high performance;
- on-going conversations about the behaviours that contribute to performance;
- regular on-going reviews;
- individual ownership and responsibility for performance;
- regular communications, on both a one-to-one and team basis where applicable;
- understanding of and commitment to the performance management process.

Diocese of Elphin – HR Policy Handbook

Document Name: Managing Performance Policy
Document No: 9.1.1 (original)
Effective Date: 15th February 2019
Written By: Frank Mitchell, HR Advisor
Approved By: +Kevin Doran, Bishop of Elphin



There are a number of elements to the performance management process. While the HR advisor is available to support the process, staff members will work directly with their managers on this.

It requires everyone involved in the process to demonstrate commitment and ownership. It is not solely the responsibility of managers to make sure it happens. Each staff member is required to take ownership of their own performance and the continual implementation of the performance management process.

The main activities in the performance cycle are:

- on the job training
- coaching
- periodic meetings

Goal setting

If the Manager and Staff member wish to use the system. It is important to agree performance and goals/objectives on an annual basis, in line with parish/diocesan/entity objectives. It is vital that staff members know exactly what is expected of them and the time-frame within which they must operate. The goal setting meeting will result in an agreed set of goals for each person, in terms of day to day responsibility as well as strategic projects.

It is worth noting that when setting goals the intention is not to cover every aspect of the staff member's work, but to concentrate on the more significant aspects of the job. For this reason it is recommended that no more than six goals be set.

The quality and clarity of goals is critical to the success of the overall process as they lay down the foundation for future conversations. Goals/objectives should be **SMART**, as outlined below.

- **Specific:** clear unambiguous and concerned with a single, specific aspect of the results.
- **Measurable:** they must contain a number, ratio or description that will make it clear when they have been achieved; consider quality, quantity, cost and time.
- **Attainable:** while standards do change, objectives should be appropriate to the 'diocese' and job holder's role and capabilities - not too easy, not too hard.
- **Results orientated:** goals have to focus on what is to be achieved and where it fits with 'diocesan' objectives.
- **Time specified:** this must clearly be defined.

It is part of a manager's role to be able to describe what needs to happen to achieve high performance. The resource implications of goals set should also be addressed at this point. Training on goal-setting can be provided to managers to facilitate this process.

The goal setting meeting is also an opportunity to review the role and job description and capture how it has changed in the period to ensure it stays update. Job descriptions should reflect the role, not solely the role-holder. Agreeing personal development plans are another output of this meeting.

Diocese of Elphin – HR Policy Handbook

Document Name: Managing Performance Policy
Document No: 9.1.1 (original)
Effective Date: 15th February 2019
Written By: Frank Mitchell, HR Advisor
Approved By: +Kevin Doran, Bishop of Elphin



Learning and development planning

Staff members development is a fundamental part of the performance management process. It is the mechanism which builds the skills to raise performance levels. Training and development contribute to performance to the extent that individual and team performance is maximised.

Part of the goal setting is to agree the targets to be achieved in the months and year ahead. The discussion should also identify each individual's training and development needs in order to be able to achieve the goals to a high standard and to build their ability to contribute to "the employer" for the future. It should not be an add-on to performance management, but an intrinsic part.

During the goal setting meeting(s):

- for each goal, identify any skill/knowledge gaps or areas for improvement;
- for each value/core behaviour, identify gaps or areas for improvement;
- identify any development goal in relation to the role or needs of "the employer"
- identify any development goal in relation to the individual's career interests;
- prioritise the training and development needs
- agree the action plan to meet these needs in an appropriate timeframe.

"The employer" uses a range of options in relation to training and development activities:

- ongoing coaching and feedback;
- on the job training;
- formal training programmes;
- educational courses;
- books, manuals, self-study;
- learning groups to research and share learning and experience on a topic;
- DVD, video;
- e-learning.

If common development needs emerge across the diocese, these can be examined to consider if a diocesan-wide intervention is required.

Performance conversations

Managing performance is not three or four formal meetings a year. It is a continuous on-going communication process where performance expectations are re-aligned, and two-way feedback happens on a day-to-day and week-to-week basis. These specific conversations, which can be initiated by the Manager or the staff member, are used to review progress and identify the behaviours that contribute to achieving high performance standards.

The purpose of performance conversation is for the manager and staff member to have an open coaching discussion about performance expectations, actual performance, and the behaviours that make a difference to performance standards. It is recommended to have these at least every 1-2 months.

The comparison of actual performance with expectations and standards serves as a basis for recognising accomplishments and planning for improvement.

Diocese of Elphin – HR Policy Handbook

Document Name: Managing Performance Policy
Document No: 9.1.1 (original)
Effective Date: 15th February 2019
Written By: Frank Mitchell, HR Advisor
Approved By: +Kevin Doran, Bishop of Elphin



The benefits to be gained from ongoing performance and coaching conversations include:

- reviewing performance measures;
- recognising accomplishments;
- understanding the behaviours that deliver high performance in the role;
- understanding what is needed to support high performance;
- realigning goals/objectives;
- recognising newly acquired competencies and skills;
- reviewing coaching and development plans;
- planning improvement where gaps are identified.

These performance conversations will explore how to achieve high performance standards and help to link individual effectiveness to 'diocesan' performance and agree options for behaviour change for improved overall performance.

Managers are expected to ask the right questions, listen actively and support the staff member to clarify what they need to achieve and the best way to achieve it. Coaching is seen as a key mechanism to achieve real results. The reviewing manager and the reviewee are expected to be accountable, and work towards tangible outcomes.

Reviews

Formal reviews are also part of our process in order to step back and evaluate the progress made, document a staff member's overall contribution and review development needs. At least two (2) formal meetings should take place within the agreed time lines. These sessions are an opportunity to:

- monitor performance against agreed standards;
- identify training and development needs;
- improve future work performance;
- provide opportunities for staff members to discuss their career interests;
- identify staff members potential;
- summarise feedback on how individuals are performing.

Where a staff member has worked on different projects or under different managers, the input of each different manager should be collated to build a more complete assessment of the staff member's performance.

In advance of the review meeting, each staff member should complete a performance review form reflecting the work they have contributed, submit it in anticipation of a review meeting. Staff members are required to use the performance review form to document how they have performed against their targets over the review period, their overall contribution and development and training.

Ownership

It is the diocesan policy that every staff member is entitled to performance feedback on a regular basis. If it is agreed to use the performance management system for this purpose, it must be remembered, that it will only be successful if both staff member and their manager take ownership of the process.

This includes:

- organising performance meetings;
- achieving mutual agreement on goals and measures;
- gathering information and analysing performance;
- providing feedback on what works well and areas for improvement;
- asking questions, listening;

Diocese of Elphin – HR Policy Handbook

Document Name: Managing Performance Policy
Document No: 9.1.1 (original)
Effective Date: 15th February 2019
Written By: Frank Mitchell, HR Advisor
Approved By: +Kevin Doran, Bishop of Elphin



- exploring how to raise performance standards;
- communicating in a genuine, open and honest way;
- completing forms and seeking advice from HR if required.

It is recommended each performance review form be signed by both the staff member and their manager and placed in the staff member's personnel file. The staff member should also be given a copy of the signed form.

All parties are expected to adequately prepare for all performance meetings.

HR advisor is available to support both manager and staff member in implementing the process or reviewing the situation should a difference of opinion emerge.

For further information please contact:

HR Advisor
Elphin Diocesan Office
St. Mary's
Temple Street
Sligo F91 KTX2
Email: hr@elphindiocese.ie
Mobile: 087 240 4882