

## Performance Management – 6 months Review Due!

Unite members should be turning their minds to preparing for their 2011 half-year performance review.

It is important that members and colleagues have their performance and achievements properly recognised. As job losses continue and the outcome of the CEO's strategic review imminent, it is of the utmost importance that your performance review identifies all your hard work and achievements to ensure your contribution is recognised in your performance ratings – one of the key differentials in assessing members' suitability for roles will be the performance review.

This guide will help you through the whole performance review process. **The majority of members who seek advice from Unite have been successful in improving their ratings with Unite's support.**

### What to Look For

Your performance review should only be based on 2011 and on your contracted hours. You should not be marked down because:

- You are deemed 'not a team player' because you are unable to work additional hours
- You are unable to work regular paid overtime
- You are unable and/or unwilling to work unpaid overtime
- You cannot adapt your working hours because of caring responsibilities
- Your line manager has been instructed to do so through the calibration process.

If your line manager has had a discussion with you that echoes any of the above you should contact Unite immediately.

### What You Should Do?

#### Step 1 – Preparation

Before attending your performance review meeting, ensure you take the time away from your desk to complete your Balanced Score Card. Ensure you have gathered copies of the supporting evidence showing your achievements throughout 2011. You should also familiarise yourself with the LBG Performance Management System – details can be obtained on the Company's interchange.

#### Step 2 – Your Performance Management 1-2-1

Discuss your performance with your line manager. Your performance and your rating should not come as any surprise to you – you should have been getting regular feedback from your line manager. If your rating does not correspond with the regular feedback, this should be challenged at your 1-2-1. It is important that you question the comments and statement you do not agree with or you feel are unfair. You should also ask your line manager to provide evidence to support these statements.

Do not accept that you are being marked down because your line manager has been instructed to do so. This is unacceptable. Remember – your performance outcome should not be a surprise to you!

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**Step 3** – if you are rated as a ‘Developing Performer’ a coaching plan should be considered between you and your line-manager. If you have been rated as ‘Under Performer’, a Performance Improvement Plan (PIP) should be agreed between you and your line manager.

**Step 4** – if you intend to challenge your rating, it is vital you contact Unite immediately. Unite will advise, support and represent your appeal through the Grievance Procedures and you have three months to do so.

## **The Issues with Performance Management Framework**

Unite has contested for some time that members who have achieved set objectives should not be marked down from a good performer because the business area has carried out a process called ‘peer comparison or calibration’. This process allows the business to judge you against your peers irrespective of your good performance. If you have achieved all that is asked of you it is incomprehensible that you are penalised.

Unite will continue to challenge this practice as we believe it is unfair, iniquitous and wrong.

## **Where to turn to for Help**

Your local Unite representative will provide advice, support and representation. To find your local rep, go to [www.unitetheunion.org/Lloyds](http://www.unitetheunion.org/Lloyds). Alternatively you can call the Unite helpline on 0808 1449595.

Unite has a strong, successful record in challenging performance ratings.

**We Deserve Better**

Wendy Dunsmore National Secretary