

AGENDA ITEM:

REPORT TO:	MERSEYSIDE FIRE & RESCUE AUTHORITY BUDGET MEETING
DATE:	17th FEBRUARY 2011
REPORT NO.	CFO/020/11
REPORTING OFFICER:	DEPUTY CHIEF EXECUTIVE & DEPUTY CHIEF FIRE OFFICER
CONTACT OFFICER:	NICK MERNOCK, DIRECTOR PEOPLE & ORGANISATIONAL DEVELOPMENT, EXTN. 4320
OFFICERS CONSULTED:	LYNN HUGHES, ORGANISATIONAL DEVELOPMENT MANAGER
SUBJECT:	VALUES BASED PERFORMANCE APPRAISAL

THERE ARE NO APPENDICES TO THIS REPORT

***There is a Glossary of Terms at the end of this report for your information**

Purpose of Report

1. To inform Members of the conclusion of the formal Consultation procedure with the trade unions in relation to the implementation of the Values Based Performance and Development Review (PDR), and confirm the model's full implementation across the Service.

Recommendation

2. That Members:
 - (a) note the conclusion of the Consultation process;
 - (b) Ratify the implementation of the Values Based Performance and Development Review across the Service.

Introduction & Background

3. Members of the Executive Leadership Board agreed the Values Based Performance Appraisal Model (CFO/171/10) in October subject to consultation with the relevant representative bodies.
 - 3.1 The model has been specifically developed to underpin the values of Merseyside Fire & Rescue Service, and developed with the assistance of Members, many of our high performing teams, as well as being verified in conjunction with Stuart Robertson & Associates Consultant Psychologists.

- 3.2 The PDR is an essential element of the organisational performance management process. It aligns each employee's performance with Service objectives, and assists our employees to reach their full potential.
- 3.3 The PDRs will provide all employees the opportunity to contribute their ideas to develop their place of work, to gain feedback on their performance, and to fully contribute to future work projects specifically aligned to the core values and Service Plans, whilst also addressing any development needs.

The PDR process will provide an environment for an open and frank discussion that ensures the manager and the employee fully contribute to:

- Communicating performance expectation.
 - Establishing individual objectives.
 - Enabling and supporting people to achieve results.
 - Review performance against our core values and behaviour.
 - Assist development.
 - Agree learning and development outcomes.
- 3.4 This will be recorded through the Assessment Matrix which facilitates the setting of objectives by both the Line Manager and the individual employee. These will be completed within the context of our core values under the following headings:
- Delivering results
 - Make a positive difference to our community
 - Work with individuals and teams
- 3.5 The PDR will then focus on exploring specific work related examples to support each employee's personal values of:
- Taking responsibility
 - Social empathy
 - Mutuality
 - Pragmatism
 - Openness to experience
 - Constructive challenge
- 3.6 The conclusion of the process will identify the objectives which will be taken forward in relation to the identified core values and these will be monitored and evaluated through an agreed timescale of informal meetings.

Representative Body Consultation

- 3.7 Formal consultation has been held with the Fire Brigades Union, Fire Officers Association, Unison, GMB and Unite and concluded on 7th January 2011.

- 3.8 The meetings were extremely positive and the trade union representatives provided a number of constructive comments in relation to the formulating of questions, and clarification of language used within the assessment.
- 3.9 Full explanations were provided to all representatives as to how the model would be implemented, and an invitation was both extended and accepted in relation to their attendance and participation at the managers training sessions that will now be conducted.

Employee Focus Groups

- 3.10 In addition to the formal trade union consultation, the People & Organisational Development Team ran two focus groups with a representative group of Grey, Green and Red Book managers who were asked to consider the values based approach to Appraisal, and to discuss their initial view or raise questions of the process. Again the feedback from the group was very positive, and the system viewed as a major improvement on the current system.

Next Stages

- 3.11 Full training will be provided to all organisational managers to ensure they are completely confident within the PDR process, understand the assessment procedures and to address any issues they have to ensure the competent delivery of the PDR process. A concentrated training delivery schedule will be completed on a modular basis to allow implementation of this process in April 2011. This will also be supplemented with a Managers Guidance document which will provide written support within the PDR process and supplement the training.

Equality & Diversity Implications

4. A full Equality Impact Assessment has been completed.

Financial Implications & Value for Money

5. None at this stage, the process can be contained within current budgets.

Health & Safety and Environmental Implications

6. None arising from this report.

Contribution to Achieving Our Purpose:

“To Make Merseyside a Safer, Stronger, Healthier Community”

7. The PDR process is another element that continues the process of embedding the core values throughout the organisation. The PDR process is key to the delivery of a core organisational value “our people are the best they can be”. The process is transparent, and facilitates employee development and growth to ensure our people continue to perform to the highest standard, whilst delivering a continued excellent service to the communities of Merseyside.

BACKGROUND PAPERS

None

***Glossary of Terms**

PDR – Performance and Development Review