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**Performance
Achievement**

Frequently Asked Questions (FAQs)



Performance Achievement

Frequently Asked Questions for all staff in the HSE and Funded Agencies of the HSE

The HSE is implementing a Performance Achievement process for all staff in the HSE and Funded Agencies of the HSE. The HSE request all services to implement, cascade and record the Performance Achievement activity with all staff immediately. The following Frequently Asked Questions (FAQ) are to assist you in this process.

The HSE are implementing Performance Achievement

1. What is Performance Achievement?

It is a forward-looking process that empowers staff to develop their performance in their current role during the twelve-month period of the Performance Achievement's annual cycle.

Performance Achievement is about your current role and what you and your manager can do together to improve the service we each provide to our in line with the goals of the organisation.

2. Why do we need a Performance Achievement process?

There are three reasons why the health service would benefit from the introduction of Performance Achievement, which are:

1. Successive staff surveys have shown that staff desire a greater level of engagement with their line manager/ team leader; Performance Achievement is designed to assist responding to the staff requests.
2. A series of National Agreements have reinforced the need for systems of performance management. Amongst these are, The Croke Park Agreement and subsequently the Public Service Stability Agreement 2015-2018 (Lansdowne Road Agreement) that states:

- a. 3.4.3. *Implementing, with the aim of supporting an ethical workplace ... performance [management]....*;
- b. 3.4.5. *Ensuring that the performance and accountability of organisations and individuals is maximised.*

3. Studies looking at the effective HR Processes have shown that there is a direct correlation between Performance Achievement processes and high performing organisations.

3. What if I already have a Personal Development Plan (PDP) or are subject to the Continuous Professional Development (CPD) process?

Performance Achievement is a parallel process, which will not replace PDP or CPD but can be incorporated into or used in conjunction with existing meetings and processes.

4. I already meet staff as part of their Continuous Professional Development and or Probation process how can I manage another meeting for Performance Achievement?

You can combine these meetings and deal with these matters in the same session.

5. Has Performance Achievement process been agreed by the Unions?

- The Unions were co-signatories of the Public Service Stability Agreement (Croke Park Agreement; Haddington & Lansdowne Road Agreements 2013-2018), which committed to introduce Performance [Management] for staff.
- Development of the HSE policy and guidance document was also developed in collaboration with the Trade Unions.
- Quarterly meetings between the HSE and the Trade Unions has been agreed to oversee the implementation process.

6. What else is driving Performance Achievement?

- The HIQA National Standards for Safer Better Healthcare – Theme 6.4.5 relates to *'monitoring, management and development of the performance of the workforce.'*
- Many regulatory bodies require recorded evidence of Performance Review and Continuous Professional Development discussions.

- Both of the HSE Staff Surveys (2015 and 2018) *'Have your Say'* indicated that staff wants to be engaged with, by their managers and receive feedback on their performance.
- Other reports recommend that staff engaged in Performance Achievement results in better patient outcomes and patient satisfaction.

7. What is in Performance Achievement for me?

- Staff surveys have repeatedly shown that staff want greater engagement with their managers; Performance Achievement is one way of making this staff request a reality.
- The formal and on-going informal meetings are to encourage staff and their managers to work together in a positive and constructive manner to achieve the organisations goals and also to support and develop our staff. The underpinning principles allow staff to engage in learning and development processes. The meetings should help staff agree with their managers what objectives they will work towards, how they will go about it and what success looks like at year end.
- Performance Achievement should benefit staff by enhancing their confidence in the performance of their role and in turn increase personal job satisfaction.

8. What is in Performance Achievement for the Health Service?

- Staff and teams should be focused on improving their skills and capabilities relevant to their roles.
- Studies have shown a direct link between Performance Achievement improved patient outcomes and service delivery.
- In short, Performance Achievement will improve the delivery of health services to our patients and users of our services and add to the staff job satisfaction.

9. What if I have a number of staff reporting to me, how can I meet all of them for a 1:1 meeting?

National Directors, Chief Officers, Chief Executives and Hospital Managers are responsible for ensuring that appropriate line manager/team leader be nominated to be responsible for their staffs' Performance Achievement and that line manager/team leader is competent of undertaking this role.

Therefore, if you have a concern regarding the number of staff for whom you are responsible for conducting their Performance Achievement, refer this to your line manager for discussion on approach.

10. When will Performance Achievement be introduced?

Performance Achievement will be implemented for all staff in the HSE and Funded Agencies of the HSE in 2020, where not already in place.

11. What training is available for me to help me engage with Performance Achievement?

The HR Divisions Leadership Education Training and Development Unit will develop and deliver training for senior and other management staff commencing in February 2020. In addition, a series of presentations and other written information is available on HSE LanD. A hard copy and electronic copy of the policy and guidance document will also be developed and made available for all staff.

A Performance Achievement Webinar and training video will be finalised and uploaded to HSE LanD (pending removal of the social distancing guidelines for Covid19 pandemic).

12. Would taking part in Performance Achievement leave me open to discipline?

Performance Achievement is NOT a Disciplinary tool. The outcome of Performance Achievement process will not leave a member of staff open to a disciplinary procedure. Performance issues should be dealt with as appropriate by line managers.

13. Do I have to engage in Performance Achievement?

Managers and Supervisors are obliged to comply with HSE policy in respect of Performance Achievement.

14. Will Performance Achievement apply to Temporary/Agency Staff?

Performance Achievement applies to all staff in the HSE and Funded Agencies of the HSE.

15. How will the implementation of Performance Achievement be monitored?

- National Directors, Chief Officers, Chief Executives and equivalent Managers are responsible for ensuring that the Performance Achievement of staff takes place in their areas of responsibility. This will cascade throughout the HSE. The roll out of Performance Achievement will be considered as part of the activity reporting mechanisms in place within the HSE.
- A National Implementation Steering Group has been established to oversee implementation throughout the HSE.
- An independent evaluation process will also be established and report within the first 12 months. Amendment's required will be made at that time.
- The HSE and Trade Unions have agreed to meet quarterly to monitor the implementation process.

16. What is the Performance Achievement Annual Cycle?

This is a 12-month cycle and is the process used for planning and reviewing an individual's performance and development needs, aligning individual goals and objectives to those of the organisation. The policy proposes at least one formal meeting in an annual cycle and two meetings are desired and recommended.

17. What does the Performance Achievement Annual Cycle involve?

It is expected that staff will meet their manager at least once in the annual cycle. The aim of this meeting is to agree goals, objectives, learning and development needs. It also facilitates monitoring progress of agreed goals.

In addition Performance Achievement seeks to encourage an on-going process of engagement between staff and their managers. It is envisaged that these 'informal' and undocumented meetings will take place on a regular basis and provide staff with the means to seek advice, guidance and assistance if required as they work towards the objectives.

18. Who is responsible for arranging the Performance Achievement Discussion?

Senior management is responsible for ensuring that Performance Achievement is fully implemented in their areas of responsibility.

Employees are also encouraged to initiate discussions in preparation for the meeting.

Line managers/Team Leaders will be responsible for ensuring that they meet with their staff in a timely manner.

19. Is there funding to assist me meet my objectives?

When staff agree their objectives with their line manager consideration will also be given to how those objectives can be achieved. If a training need is identified then the process for the approval of the funding for that intervention will be one that is taken locally.

However, the achievement of objectives should not always be dependent on the availability of learning and development. For example during the Performance Achievement Annual Cycle staff and managers should meet informally on a regular basis and as required, managers should proffer support, guidance and assistance towards the achievement of the agreed objectives.

Support may also be available from your colleagues, peers, and from HSELand.

20. How will the Performance Achievement Discussion be recorded?

The objectives will be agreed with your line managers and recorded on the Performance Achievement documentation.

Who keeps the Performance Achievement Record?

A copy will be retained by the individual staff member and by the line manager.

Performance Achievement activity reporting will be developed and results presented through the CEOS, Chief Officers, National Directors and others, to the monthly performance measurement reports in the HSE.

21. Will a copy be kept on my personnel file in HR?

The Performance Achievement record forms part of the record of employment and will be kept as part of staff members 'Personnel File'. This will not be used as part of the recruitment processes should the member apply for another position. All document retention will comply with HSE GDPR guidelines – see §22 below.

22. Who else will see my Performance Achievement form?

Performance Achievement forms will be marked 'confidential' and handled and stored in accordance with the HSE policy, '*Information Classification and Handling Policy*' (<https://www.hse.ie/eng/services/publications/pp/ict/information-classification-handling-policy.pdf>) and '*Records Retention Periods Policy*' (<https://www.hse.ie/eng/about/who/qualityandpatientsafety/healthcare/healthcarerecordsmgt.pdf>).

23. What happens to individuals who under-perform?

Performance Achievement is NOT a disciplinary process. Underperformance forms part of the individuals Performance Achievement Framework (www.hse.ie) and is managed in a separate process by your line manager.

24. What is the difference between Performance Achievement and Performance Appraisal?

Performance Appraisal is a process in which a manager:

- Examines and evaluates an employee's past work behaviour by comparing it with pre-set standards;
- Documents the results of the comparison; and
- Uses the results to provide feedback to the employee to show where improvements are needed and why.

25. What is the difference between Performance Achievement and Continuous Professional Development (CPD)?

- See Point 1 above; and
- Continuous Professional Development (CPD) – encompasses experiences, activities and processes that contribute towards the development of a health care staff. CPDs are, therefore, a lifelong learning process of both structured and informal learning.

26. What is the difference between Performance Achievement and Personal Development Plans (PDP)?

- Performance Achievement is about your current role this year and what you and your manager can do together to improve the service we each provide to our patients and clients; and
- Personal Development Plans (PDPs) are used on a voluntary basis to help develop the staff member's long-term growth within the health service.