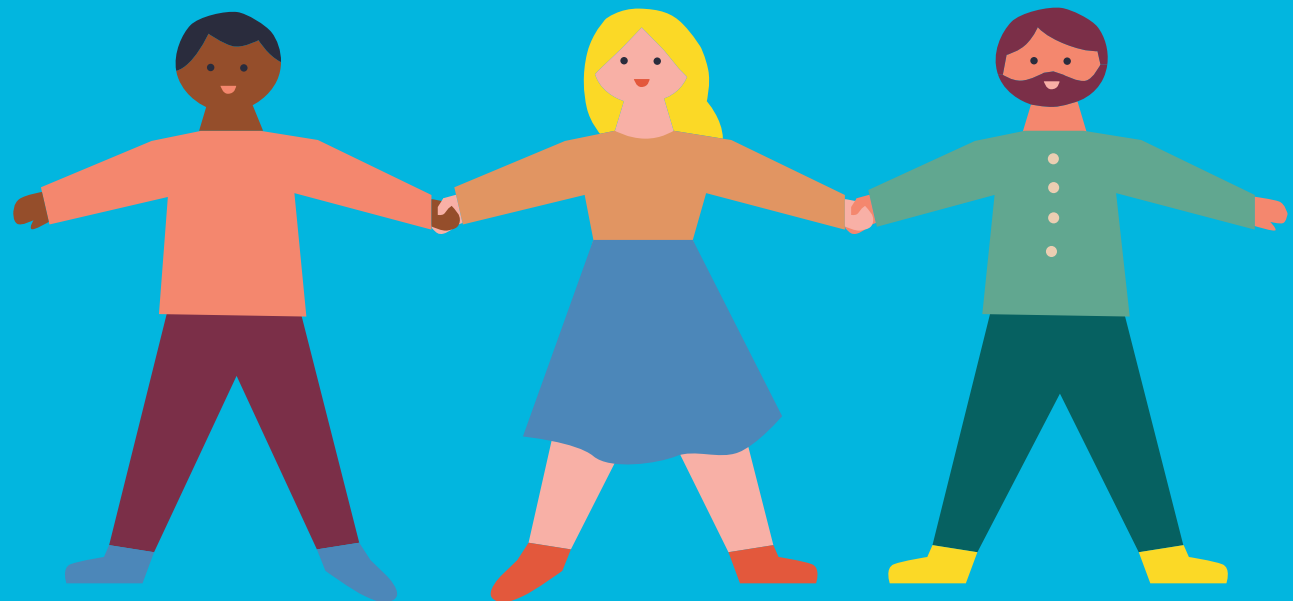


Performance Guide



Overview & what is performance all about?

There's lots of different jobs that people do at the Co-op and so we understand that performance can't be a one size fits all approach, but we do think we can apply some common principles to performance for everyone.

We listened to what colleagues across the Co-op had to say on performance. Two main things came out:

- Colleagues want to know how they're doing all year round not just in mid-year and year-end reviews
- They also want the process to be easier to understand without having to spend a lot of time collecting evidence or filling in paperwork beforehand.

So, our principles for performance at the Co-op are:

**Simple and
Intuitive**

**Consistent, fair
and transparent**

**Based in the
real world**



When we talk about 'performance' we mean what we're regularly doing in our roles as well as the goals we set each year and how we achieve them to demonstrate our ways of being Co-op.

Talking about performance each time we catch up helps us to make decisions about areas for development and support.

This guide is here to help you understand how we talk about performance, the processes and time-lines involved and how it all fits together.

How the pieces fit together



What is calibration?

Calibration is all about managers coming together to talk about colleague performance and ensure that the ratings are applied consistently and fairly

Why calibrate?

Managers can look at their colleagues' performance and give a clear and consistent rating. It means that managers can manage, develop and reward their colleagues fairly. Everyone involved in the calibration is clear on what the ratings look like.

Remember:

Managers and colleagues have a shared responsibility to have regular performance conversations, share information and feedback throughout the year in 121's, reviews and in day to day discussion. Calibration should reflect this.

Calibration

More information on how this process works can be found in "A guide to calibration".

Goal setting

Goals help us to align ourselves - they give clear direction of what our priorities are, allowing us to focus on what matters most.

At Co-op there are different approaches to setting goals; in some business areas goals will be set for you, in others you will set your own goals in agreement and discussion with your manager.

For more information please read 'Goal setting guide'.



Goal Setting

Personal Development Plan

You may also have a development plan which underpins your goals.

It can help you to become more successful in your current role or it may support you to move onto your next role. You can use the template at the back of this guide to support you to create one

Feedback and regular conversations

Whether it's written down or in the moment we're talking about an honest two-way conversation. For example if you've been impressed with the way a colleague handled a series of questions in a meeting or helped out a customer in store make sure you say it to them as soon as possible. Equally if you thought something didn't go as well as it could've done, offer your thoughts on how you feel it might have been done differently to get a better outcome. Feedback gives each of us some direction to work towards, find out what we're good at and even get a confidence boost knowing others are observing our efforts.

Don't forget to arrange regular times to discuss your performance with your manager. You're both responsible for making sure they happen.



Tips for giving great feedback

- Put yourself in the shoes of the other person and think about how they'd like to receive your message
- Own the feedback: prepare, be specific, give details and further clarity if needed

Tips for receiving feedback

- Listen or read what the feedback is - not what you think it is
- Ask questions if you need to so you can understand what you can do more or less of
- Think about how you apply the feedback to develop




Regular feedback

For more information about how to give and receive feedback that makes a positive impact check out the guide to great feedback.

Why do we have performance reviews?

Reviews are a great chance to look at how you're doing. It's a chance for you and your Manager to sit down and summarise all the conversations you've had to date and talk in depth about what you've achieved, how you can develop and identify what support you may need going forward.

Don't forget reviews shouldn't be the only time you talk about your goals and performance, it should be an ongoing conversation between you and your Manager.



So what can you expect from the mid-year and end of year reviews?

Mid-year reviews are a good check-in point for discussing:

- Goals - are they still relevant? Have your priorities changed?
- Any new goals needed?
- Support - is it at the right level - more or less needed?
- Development - activities in progress?
- Any learning shared?
- Achievements - celebrate success
- Feedback and evidence
- Agreed focus for the next half of the year

End of year reviews will cover

- Goals - what you've achieved over the year and how you went about it.
- What are the themes that have come through the feedback received? How have you responded to these?
- What do you want to focus on in the year ahead?

Formal Reviews

You'll get your confirmed rating during your mid and year end review meetings. Talk about ratings throughout the year so there are no surprises

Handy tips

- Preparation can help you make the most out of the reviews - spend some time thinking about what you've achieved and bring with you any information that will help your discussion
- If you've changed roles make sure you've had a discussion with your old manager before you moved roles as well as your new manager
- Think about the conversations you've had about your development areas/successes
- Collect and ask for feedback throughout the year, rather than rushing to get feedback from busy colleagues/managers at review times.



****Specific timelines for your mid-year and end of year reviews can vary by business area each year so please check your local communications.****

Formal Reviews

Additional things you might need to remember (if you're a manager):

- Remember to schedule in reviews for those colleagues going on special/maternity/paternity leave before they go.
- Encourage your team to book in the meetings with you themselves so it's convenient to them and you both have enough time to prepare.

Rating performances

The performance rating needs to take into account the whole period that is being reviewed. If a colleague has spent time in more than one role during the review period then the review should reflect this. Remember - the end of year rating is looking back across the whole of the year not just the six months since the mid-year review.

If a colleague has worked for more than one manager during the review period or matrix management is in place then input should be taken from each manager.

If a colleague is on a secondment, the rating should be applied against their 'home' grade (as this is what their T&C's are based on) e.g. if a grade E colleague is seconded or stepping up into a grade D role, their rating should be measured against grade E as this is their home grade.

Performance ratings

Exceptions/Nil Ratings

These are by exception where there is not enough evidence to make a fair assessment, due to the amount of the time the colleague has been in the role or at work. Please note that for those going on maternity or adoption leave; a formal review should be completed before they go and a rating based on the performance period they have worked agreed.

A - New to Role. A new starter to the Co-op (less than three months service)

B1 - Career Break

B2 - Maternity/Adoption/Extended Paternity Leave

C - Long Term Absence

D1 - Leaver

D2 - Leaver (Redundancy)

Performance ratings

Outstanding – consistently incredible performance

‘What’: the role and goals

- Colleague has consistently and significantly surpassed the requirements of their role and all of their goals
- Consistently exceeded all goals and role requirements at a significantly higher level than expected for the role
- Colleague has added significant additional value to the Co-op
- Delivered success in unexpected ways/areas.

‘How’: Ways of Being Co-op

- In delivering in their role and achievement of goals, the colleague is recognised both inside and outside of their team (and possibly business area) as being an exceptional role model for our Ways of Being Co-op in everything they do
- Inspires and influences other colleagues to demonstrate our Ways of Being Co-op.

Overall

Colleague has made an exceptional contribution and added significant additional value to the Co-op. Is recognised for significantly exceeding the standards associated for their role, all of their goals and is recognised as being an exceptional role model of our Ways of Being Co-op. Inspires and influences other colleagues to demonstrate our Ways of Being Co-op.

Exceeding – consistently great performance

‘What’: the role and goals

- Colleague has consistently surpassed the requirements of their role and all of their goals
- Consistently exceeded all goals and role requirements at a higher level than expected for the role
- Colleague has added additional value to the Co-op and gone the extra mile.

‘How’: Ways of Being Co-op

- In delivering in their role and achievement of goals, the colleague is recognised both inside and outside of their team as being a role model for our Ways of Being Co-op in everything they do.

Overall

Colleague consistently surpasses the requirements of their role and all of their goals. Have added additional value to the Co-op and gone the extra mile. A role model for demonstrating our Ways of Being Co-op in everything they do.

Achieving – consistently good performance

‘What’: the role and goals

- Colleague has consistently delivered the requirements of their role and achieved their goals with little guidance and support
- The requirements of their role and goals have been fully met to the standards associated with this including measures such as quality, time and cost.

‘How’: Ways of Being Co-op

- In delivering in their role and achievement of goals, colleague has consistently demonstrated our Ways of Being Co-op in everything they do
- They are working on becoming stronger in how they demonstrate these for themselves and within their team.

Overall

Colleague has made a consistently strong contribution to the Co-op in their role and through the delivery of all of their goals. Consistently met the expectations of the role. They are recognised as someone who consistently demonstrates our Ways of Being Co-op in everything they do.

Partially achieving - varied performance

'What': the role and goals

- Colleague has achieved some but not consistently all of the requirements of their role and goals and may at times have needed some support
- They may have achieved some of the requirements of their role and/or goals to the standards associated with this including measures such as quality, time and cost.

'How': Ways of Being Co-op

- In delivering in their role and achievement of goals, colleague mostly demonstrated our Ways of Being Co-op but on some occasions may not have or may have needed some support.

Overall

Colleague has delivered some but not all of the expectations of their role and goals. Mostly displays our Ways of Being Co-op, but on some occasions may not have. They may be developing in their role to meet the standards needed in both the 'what' and/or 'how' of their performance.

Unacceptable - underperforming

'What': the role and goals

- Colleague has shortfalls against all or many aspects of their role and goals
- Their contribution has not met the expected standards associated with this including measures such as quality, time and cost.

'How': Ways of Being Co-op

- In delivering in their role and achievement of goals, colleague has not demonstrated our Ways of Being Co-op in the way they work.

Overall

Colleague has not achieved the expectations of their role and goals and/or have not demonstrated our Ways of Being Co-op in how they work. Colleague has required additional management support and direction to improve.

Improving performance

We all need to take ownership for achieving and maintaining great standards of performance. There may be times when this drops below what is expected for a variety of reasons. It is recommended that if a colleague has received 2 consecutive ratings below achieving, then the manager should contact ER services to discuss ways to support the colleague going forward.

The Improving Performance procedure is a framework to help support colleagues to achieve the right level of performance and make it stick going forward. More information is available in our People Policies pages on the Intranet.



Personal development plan

Name		Manager	
Job		Department	
Year		Grade	

Identify the development you need to help you to perform your role better, achieve your goals and future career aspirations.

Development need:	Development solution:	Expected results:	Date to be achieved by:	On-going review:
What skills, knowledge or our Ways of Being Co-op behaviours do you want to develop?	How will this need be met and what support do you need?	What changes or results are you hoping to achieve as a result of this development?	When do you hope to achieve this by?	What are you doing differently now?