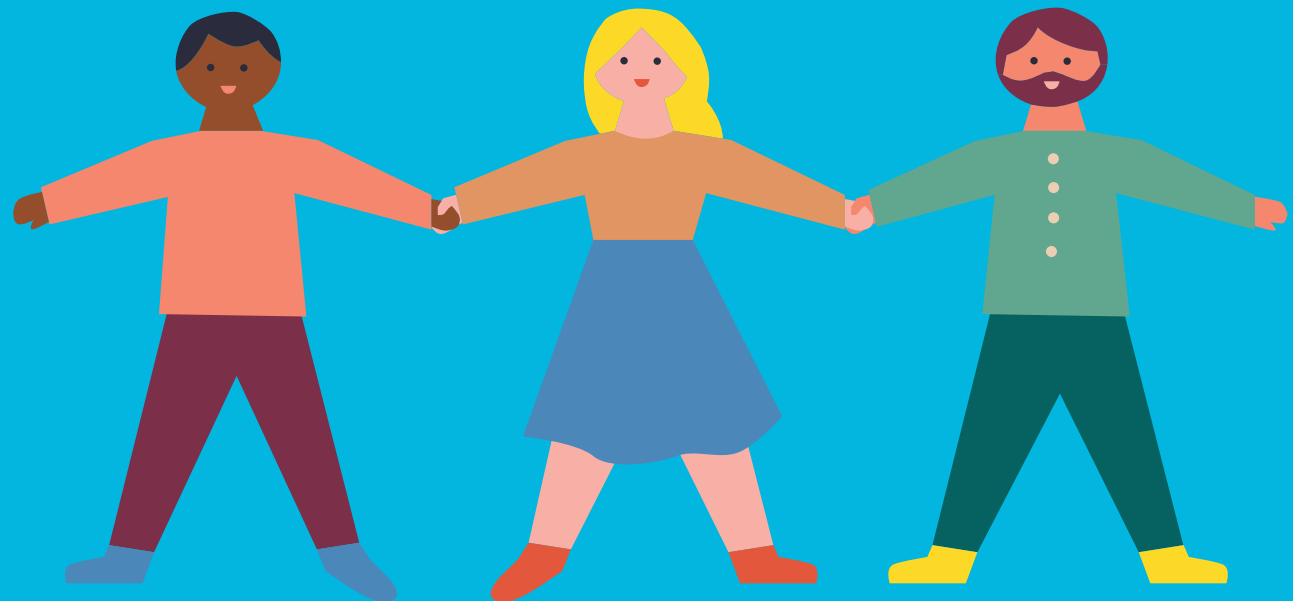


Performance Guide



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



Why do we calibrate?

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:

When applying ratings, focus should be on the impact of the individual rather than the time worked to ensure that colleagues are being measured on outputs rather than the time spent on an activity.

Calibration

**More information
on how this
process works can
be found in
"Calibration
Toolkit".**

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

Regular conversations and feedback

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 conversations and 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 Year-end 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

Year-end 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?
- What support do you need from your manager

Formal Reviews

You'll get your confirmed rating during your Mid-year Year-end review meetings. Have regular conversations 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 Year-end 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 year-end 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.

Secondments

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).

Secondment example

Mo is a grade E colleague who is seconded into a grade D role. His rating should be measured against grade E as this is his home grade.

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.

Maternity example

Julie went on Maternity Leave in July for the remainder of the year. Julie's performance before she left was Exceeding. Her Year-end rating is Exceeding.

Move roles in Co-op example

Kim has worked for 2 months in her new role and the rest of the year in a different role in Co-op where her performance was rated Good - Achieving. It's too early to say how her performance should be rated in a new role. Her year-end rating is a reflection of the entire 12 months therefore Kim's final rating is Good - Achieving.

Performance ratings

Do you have any colleagues working part-time hours?

Do not be deterred from recognising what is exceeding or outstanding performance for someone who works reduced hours, simply because they are not at work for as long as others.

When applying ratings, focus should be on the **impact** of the individual rather than the time worked to ensure that colleagues are being measured on outputs rather than the time spent on an activity.

Performance ratings

Outstanding – consistently exceptional performance

- Colleague is an exceptional role model and champion of our Co-op Behaviours and Ways of Being, both inside and outside of their team, and demonstrates an ability to inspire and influence others through their behaviour.
- Colleague significantly surpassed the requirements of their role, making a significant positive impact and adding lasting value to the Co-op through their role.
- Colleague shows very high levels of effort by proactively taking on higher levels of responsibility and is seen as an excellent resource for providing guidance and support to others.
- Creates and role-models a culture of adaptability and resilience and leads by example.

Exceeding – consistently great performance

- Colleague is a role model for our Co-op Behaviours and Ways of Being, both inside and outside of their team.
- Colleague has made a positive impact and added value to the Co-op by consistently going above and beyond the requirements of their role.
- Colleague shows high levels of effort by taking on higher levels of responsibility with very limited or no supervision.

Achieving – consistently solid performance

- Colleague consistently demonstrates our Co-op Behaviours and Ways of Being in everything they do.
- Colleague has fully and consistently met the expectations of the role with little guidance and support and has made a valuable and effective contribution to our Co-op through their role.

‘Achieving’ performance should be viewed as good and solid performance.

Partially achieving – varied performance / building performance

- Colleague mostly but not consistently demonstrates our Co-op Behaviours and Ways of Being.
- Colleague has met some, but not all, of the expectations of their role and made mostly good contribution to our Co-op through their role.
- Colleague may be developing in their role and need additional support, coaching or feedback.

Not achieving – not meeting performance expectations

- Colleague has not demonstrated our Co-op Behaviours and Ways of Being and/or has not achieved the expectations of their role, resulting in poor contribution to our Co-op.
- Colleague has required significant additional management support and direction to improve.

Exceptions / Nil ratings

Nil Rating (A) - New to Coop

Should only be applied to colleagues who started after 1st October. Anyone who started before 1st October should get one of the main ratings.

Nil Rating (B1) - Career Break

Should only be applied if a colleague was out of the business due to a career break for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (B2) - Maternity/Adoption/Extended Paternity Leave

Should only be applied if a colleague was out of the business due to a parental leave for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (C) - Long Term Sickness

Should only be applied if a colleague was out of the business due to long term sickness for more than 9 months in the performance year. Colleagues that have been working for 3 months or more in the performance year should get one of the main ratings.

Nil Rating (D1) - Leaver

Should be applied to all colleague who have already left at the point of the review.

For almost all of colleagues you will be able to give one of the 5 main ratings. Nil ratings are only given in exceptional circumstances where there is not enough evidence to make a fair assessment.

Remember:

If you award a Nil rating, it may impact a colleague's eligibility for an Annual Salary Review and eligibility to participate in the Bonus Plan where applicable.



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?