



**People manager guide**

# **Performance management**

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### This guide supports several businesses functions:

- People managers, supervisors, project and matrix managers; line managers
- Human Resources and Diversity & Inclusion teams
- People with responsibility for owning and reviewing employment-related policies
- Learning and talent development leads

It is designed to equip you with the knowledge to support all employees who have or may have a disability or condition to thrive in their jobs, and to help you implement fair and supportive practices through formal performance procedures when you need to do so.

It will help you to:

- Set targets and objectives and decide when it may be reasonable to adjust these for employees with a disability or long-term condition.
- Give helpful feedback to employees about their performance and help you to implement performance improvement plans.
- Identify the impact of a disability or long-term condition on the performance and/or behaviour of an employee and what this may mean for the team as a whole.
- Adjust disciplinary, capability, performance management and grievance processes for the needs of disabled people or those with long-term conditions where appropriate.
- Manage the needs and expectations of your whole team including non-disabled employees.
- Make sure you comply with the law.
- Know where to go for more help and advice.

As a people manager, you have a vital role to play in enabling your team to perform to the best of their ability and to meet their objectives and performance targets. You are key to creating an open and supportive environment at work where employees can talk about any issues, and to helping them develop and contribute to organisational goals.

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It is also your responsibility to take action if a member of your team is not performing to the standards required. As well as retaining and nurturing talent, you also need to know your legal obligations and to act fairly towards anyone who is not performing well because of a disability or long-term condition.

You are required by law to make changes or 'reasonable adjustments' to help disabled employees, and those with long-term conditions, work to the best of their ability. Reasonable adjustments are not about treating some people more favourably but rather about recognising you need to treat people differently in order to treat them fairly and to enable them to realise their full potential.

By making adjustments you should be removing barriers faced by disabled people in the workplace because of their disability, or long-term condition. Once barriers have been removed, the performance of disabled employees can and should be held to the same standard as their non-disabled colleagues.

In some cases, you will be recognising and rewarding good or exceptional performance, and in others you will need to implement processes to try to improve performance. The only difference between managing disabled and non-disabled employees is that the performance of disabled employees must be assessed after adjustments have been made.

Learning how to make adjustments and manage people with both visible disabilities and those which may not be immediately visible is part of being a good manager. You should not think about managing disabled employees as separate to your other duties as a manager – good managers know how to manage difference, whether apparent or not, in order to get the best from all members of their team. Everyone is different, there is no such thing as a 'standard' employee.

There will be more about adjustments and how to make them in this guide.

**The only difference between managing disabled and non-disabled employees is that the performance of disabled employees must be assessed after adjustments have been made.**

## I don't think I have any disabled people working for me

You may be surprised to find that in fact you do.

When we hear the word 'disability', often what comes to mind are images of white sticks, guide dogs, hearing aids and wheelchairs. However, whilst considering physical accessibility is very important, the vast majority of disabilities are not immediately visible and may include:

<b>Visual impairments.</b>	<b>Hearing impairments.</b>
<b>Speech impairments.</b>	<b>Diabetes.</b>
<b>Dyslexia or dyspraxia.</b>	<b>Epilepsy.</b>
<b>Asthma or other respiratory diseases.</b>	<b>Autism.</b>
<b>Cognitive difficulties.</b>	<b>HIV.</b>
<b>Cancer.</b>	<b>Heart disease.</b>
<b>Gastric problems like irritable bowel syndrome or colitis.</b>	<b>Mental health conditions like depression, anxiety, schizophrenia or bipolar disorder.</b>

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It's also important to remember that many disabled people have fluctuating conditions which affect them differently at different times and which may in turn result in fluctuating performance depending on the effect of their disability on them at any given time.

The term 'disabled people' is very broad. Indeed, the legal definition of 'disability' is so wide that people you may not regard as disabled, or indeed do not think of themselves as disabled, are protected under the Equality Act 2010. It includes people whose disabilities are not obvious and those who acquire a disability while working for you. Most disabled people are not born with a disability but become disabled at some point in their working life. The prevalence of disability rises with age: only 8% of children have a disability, compared to 19% of working age adults and 45% of State Pension age adults<sup>[1]</sup> – so as we live and work longer, it's becoming even more likely that many of us will be working with a disability at some point in our lives.

Don't worry about trying to work out if someone meets the legal definition of disability. The only way to know for certain if someone meets the definition is by going to a tribunal or court. A doctor or occupational health adviser will not be able to tell you. The most they will say is that the person is 'likely' to be protected by the disability provisions of the Equality Act.

The best practice approach is to focus on the adjustments that are needed for someone to do their job. It's important to remember that you also have a legal obligation to make reasonable adjustments for any disabled person who is having significant problems at work whether or not they have explicitly told you about their disability. This means you must consider it possible that someone who is not performing well might have a disability, or condition, that might not be immediately apparent or be in the process of managing a newly-diagnosed disability that may be affecting them at work.

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<sup>1</sup> Family Resources Survey 2016/2017.



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They may not be aware they have a disability themselves. You need to try to find out why they are underperforming at work, to get more information if necessary and to identify and implement adjustments that will help them to improve their performance and maximise their contribution.

By focusing on identifying and removing the barriers they are facing, you will improve the performance of everyone in your team and find that whether someone would legally be considered disabled becomes less and less important.

## What is performance management?

Performance management is more than just performance appraisals that take place every year.

Performance management is an ongoing process that includes:

- Setting clear and realistic goals, objectives and targets.
- Coaching and developing employees.
- Providing regular informal feedback.
- Formally evaluating performance (at appraisals, development reviews or similar).
- Recognising and rewarding good performance.
- Developing action plans to improve performance where necessary.
- Considering long-term career development.
- Identifying training and development needs and how they should be met.

Employees who have clear direction from their manager and receive regular feedback on how they are doing have higher levels of job satisfaction and are more likely to want to stay with your organisation.

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# Starting work and the probationary period



**It is important to think about the essential tasks required in the role at the very beginning, before the recruitment process begins.**

Consider right from the start whether the job could be done with adjustments; for example, from a different location, working flexibly or from home or with adaptive software. This will help make sure you recruit the strongest candidate, by assessing everyone against the key competencies the role requires. Once you have appointed to the role, find out if your new employee will need any adjustments to perform to their best of their ability, and get these in place from the start.

Although it isn't a legal requirement, most organisations have a probationary period for new employees during which their performance and suitability for the role continue to be assessed. Probationary periods should be for a fixed period – usually three or six months depending on the job and the seniority of the position, with more senior positions usually having longer probationary periods.

The probationary period should be long enough for the employee to learn the key elements of the job and for you to assess whether the new employee will be capable of fulfilling the requirements of the role.

Probationary periods should be structured with clear objectives and/or targets to allow you to assess and review the new employee's performance, capability, training and development needs and suitability for the role. Remember to explain this to the employee. It is important they understand that if their performance is not satisfactory, they may not be retained in post.

Employees who need workplace adjustments will only be able to demonstrate they can do the job to the standard required if they have adjustments in place and working effectively. If the adjustments are in the form of equipment or technology try to ensure they are in place before the person starts work. If the adjustments are to working hours or location, allow the person to work the hours, and from the location, agreed during the probation period as they would after the probation period. This enables you to assess their ability to do the job to the required standard once they are confirmed in post.

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During the probation period you should:

- Regularly monitor the new employee's performance at progress meetings.
- Identify and discuss any problems as soon as possible.
- Provide regular constructive feedback, support and guidance.
- Provide any necessary training and coaching.
- Review adjustments to ensure they are still effective and implement any new adjustments if these are needed.

Employees can only demonstrate their capabilities and suitability for the role if they are clear about what is required from them.

This means that at your first meeting you must ensure the new employee understands:

- What outputs or deliverables are required from them by the end of the probationary period, i.e. what do they have to achieve and by when.
- The standard of performance required of them, i.e. what does good look like and what is not good enough, illustrated with examples.
- How their performance will be measured, i.e. any standards or measures you regularly use. These could be from data collected electronically, quality control measures or feedback from customers or colleagues.
- What standards of conduct or behaviour are required which may include how they dress or how they work with clients and colleagues.
- Any areas where they will need to develop their skills or knowledge.
- What they should do if they are experiencing problems or if adjustments aren't working effectively.

**Review adjustments to ensure they are still effective.**

**We are Business Disability Forum. We believe the 26 million people in the UK and over 1 billion people worldwide with disabilities and long-term conditions enhance the social and economic health of our societies.**

We are the world's first business disability network and have almost 30 years' experience bringing together business, disabled opinion leaders and government to transform opportunities for disabled people to contribute equally to society and economic growth.

Our aim is to help organisations become fully accessible to disabled employees, customers and service users for mutual benefit.

Our 300 plus Members collectively represent around 20% of the UK Workforce and employ an estimated 8 million people worldwide.

We provide them with pragmatic support through training, consultancy, resources and guidance plus peer to peer learning and support.

Our leading business inclusion Advice Service provides a responsive space for members working on any aspect of disability inclusion to talk through ideas, trouble shoot, and get case support on the disability related challenges in their business.

Our community of businesses, thought leaders, and disabled people develop research which influences policy development.

Our events, sector networks, and subject task groups bring together professionals with shared interests to learn from one another, share insight, and collaborate on projects.

## **Join us**

If you are not already a Member or Partner of Business Disability Forum, why not join us? To find out how, contact our team on telephone number **+44-(0)20-7403-3020**; or by email to **join@businessdisabilityforum.org.uk**.

For a full list of our Members and Partners and for further details on the service we offer please visit **www.businessdisabilityforum.org.uk** or contact our team:

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