

Human Resources, Resources
222 Upper Street

Report of: Corporate Director of Resources

Meeting of: Corporate Resources and Economy Scrutiny Committee

Date: 6th June 2024

Ward(s): N/A

Subject: Update on Check Ins and Previous Review of Performance Management

1. Synopsis

- 1.1. Islington Council introduced a new approach to performance development across the Council on 1 April 2023. The new approach is called Islington Check Ins, and this replaced the previous model called Quality Conversations.
- 1.2. Following a Scrutiny Review Working Group, two recommendations from the Policy and Performance Scrutiny Committee were received and approved by the Executive.
- 1.3. This report sets out the progress made in relation to the two recommendations.
- 1.4. This report also contains updates of progress made in relation to the overall embedding of Islington Check Ins.

2. Recommendations

- 2.1. That the Committee notes the progress made in implementing the new Performance Development, taking account of the recommendations to the Executive that followed the Scrutiny Working Group.

3. Background

- 3.1. In June 2022, the Executive received an initial report of the Policy and Performance Scrutiny Committee following their Scrutiny Working Group review of Performance Development.
- 3.2. In March 2023 the Executive received a report updating on the two recommendations made by the Scrutiny Committee in relation to the new Council wide approach to performance development – Islington Check Ins;

- 3.2.1 **Recommendation one:** Council officers to make sure that the current approach to performance development is being utilised by managers with recent improvements fully embedded. A communications campaign from April 2022 onwards will reinforce messages linking Quality Conversations to objectives and development planning for 2022/23, referring managers to a curated selection of supporting development resources and tools, linked to our CARE values.
- 3.2.2 **Recommendation two:** Staff performance and development continue to be reviewed, with the aim being to design, deliver and evaluate a new approach which is fit for purpose for a diverse population of roles and work styles through trialling approaches with different work groups.
- 3.3. The Executive agreed to note the response to the recommendations in March 2023 which focused on the Council's new approach to Performance Development, called Islington Check Ins.inc
- 3.4. The Policy and Performance Scrutiny Committee requested a further update on the two recommendations now that the scheme has been in place for a year.

4. Updates on progress against recommendations

- 4.1. On 1 April 2023, Islington Check Ins was officially launched. The basic structure of the new approach is that every month a Check In takes place between the line manager and team member, and that every four months (July, November and March) the Check In conversation is replaced with a Check In Review.
- 4.2. The difference is that during a Check In Review, both the manager and team member reflects back on the previous four months and a 'current status' is awarded. There are three possible current statuses which are colour coded; Green = Performing well, Amber = Some strengths with areas for improvement and Red = Not performing well.
- 4.3. Managers are required to upload the current status of all team members onto our MyHR system by the end of the Check In Review months. Managers enter one of the three current statuses, or there is an option for 'unable to submit' in the cases of colleagues with specific cases, for example those on maternity leave, long term sickness leave or career breaks. From April – October 2022 the council delivered an ongoing communications campaign which focused on managers fully utilising the improvements we had made to the previous model of performance development called Quality conversations. These improvements included documentation to capture individual performance objectives and individual development plans. The documents were supported by practical guidance, tools and tips available on our intranet and during development workshops for managers. These documents also linked conversations about performance development to our CARE values (Collaborative, Ambitious, Resourceful and Empowering).
- 4.4. From November 2022, we began a new communications and engagement campaign in the lead up to the launch of our new approach to performance development, Islington Check Ins. The campaign shared several important messages including, the reasons for change, what to expect, timeline and the benefits of the new approach. During November and December 2022, the HR team attended all Directorate Management Team meetings to begin the conversations and to take on board initial feedback on Islington Check Ins,

along with sharing important milestones leading up to the launch. The communications campaign used various channels and formats to share messages, including short films, attending toolbox talks (in person events for frontline colleagues in Homes and Neighbourhoods and Environment), focus groups and engagement activity with Colleague Forums and Trade Union colleagues.

- 4.5. From January – March 2023 the HR team designed, delivered, and evaluated a mandatory workshop for all colleagues with line management responsibility across the Council, which included our Corporate Management Team and Trade Union colleagues. We delivered these workshops called 'Check Ins for Managers' in person, to 1,064 managers. Colleagues rated the workshops 4.4/5, with managers agreeing that it was useful (90%), enjoyable (80%) and would recommend to a colleague (80%). This workshop continues to be mandatory for all new managers and is updated with any changes regularly.
- 4.6. During this same period, we made numerous supporting online resources available for all colleagues to access on our intranet and MyLearning (the council's learning management system); this included templates in various formats, guidance for managers and all colleagues, frequently asked questions and answers, demonstration and top tips films.
- 4.7. Throughout this period, HR colleagues connected with managers from across the Council and were invited to join local team meetings to understand and suggest ways of overcoming any challenges that service areas anticipated facing with using Islington Check Ins. We then worked collaboratively with these managers to create supplementary or bespoke approaches to using Islington Check Ins to make it work for their colleagues. For example, we created a bespoke Check Ins template for our colleagues in the concierge service.
- 4.8. When the scheme launched as planned in April 2023, we began to focus on messaging and support resources for our colleagues across the Council. We designed, delivered and evaluated an online workshop for any colleague to attend called 'Getting the best from your Check In'. We have had 308 staff attend and the feedback has been positive. Our council wide communication campaign is ongoing and we regularly share updates with all colleagues; since moving to our new intranet (Islington Connect) our Check Ins page is one of the most visited on the site with over 2,500 visits.
- 4.9. We increased communications and engagement in the lead up to our first Check In Review month (July 2023) so that everyone was aware of what was required from managers to submit the current status of all their team members. Below you will see the results from all three Check In Review months we have experienced:

When	% of submissions	% of current statuses
July 2023	84.05%	Green 73% Amber 20.78% Red 0.51% Unable to submit 5.72%
November 2023	76.01%	Green 79.46% Amber 14% Red 0.89% Unable to submit 5.66%
March 2024	91.69%	Green 84.09% Amber 9.75% Red 0.58% Unable to submit 5.59%

- 4.10. We are continuously asking for feedback and suggestions on how to improve Islington Check Ins and have made several changes as a result. For example, we have created some moderation guidance for leadership teams, we have designed a reconsideration meeting for colleagues who disagree with their current status and we updated the descriptions for each of the current statuses to clarify how colleagues use them in practice.
- 4.11. You will notice a decrease in current status submissions in November 2023 so we built in additional processes to prompt managers to complete the form on our MyHR system, and this has led to a 15.68% increase for the March 2024 Check Ins Review period.
- 4.12. During February – March 2024 we delivered an all-colleague survey and the results have shown an increase in the response rate to ‘my line manager deals effectively with poor performance’ by 15% since the 2021 all colleague survey. 83% of colleagues felt their manager ‘gives and invites honest feedback to improve performance’ which was an 9% increase. 79% of colleagues felt their manager ‘helps them to perform in their role’. Only 11% of colleagues disagree that ‘Check Ins provide space for my performance to be reviewed and developed’.

- 4.13. Statuses are monitored from an equality perspective and reported to the corporate management team and the trade union joint secretaries. When monitoring the equalities data, a downward trend has been noted in colleagues from Black backgrounds receiving amber statuses, and a static trend with male colleagues receiving an amber status. There has consistently been no downward or upward trends with the other protected characteristics, which suggests that statuses are being allocated fairly and consistently based on performance.
- 4.14. We are closely monitoring all 'not performing well' current statuses as the figures are not representative of where we would expect them to be. We continue to develop our managers to have open and honest performance conversations during Islington Check Ins. Our March 2024 Check In Review period was when we re-instated withholding annual increments for colleagues who are still eligible for increments who were awarded a 'not performing well' status. Performance led incremental progression is outlined in our statement of particulars and within our disciplinary procedure.
- 4.15. We are continuing to monitor the equalities data and working with colleagues to identify further trends within the data, so that we can act on any areas of concern, in collaboration with senior leaders and managers. We will also continue to work with teams who are less engaged with Islington Check Ins to understand what barriers they are facing and how we can help overcome them.
- 4.16. Overall Islington Check Ins have been well received with positive feedback from colleagues, managers, senior leaders, colleague forums and Trade Union colleagues. Islington Check Ins are an important component to us investing in a high performing workforce, as outlined in our Islington Together 2030 plan.

5. Implications

5.1. Financial Implications

- 5.1.1. The implementation of the Check-in's process was managed within existing budgets.
- 5.1.2. Linking performance in check-in reviews to the award of salary increments has had minimal financial implications. The award of increments is managed within existing service budgets across the Council, and there is no change to this practice. There may be a small saving in relation to staff who are awarded a red status as they will not receive their increments until performance improves. However, only 4 staff members did not receive pay increments because of the Check-in's process therefore this will not have a material impact on staffing budgets.

5.2. Legal Implications

- 5.2.1 The Council's contracts of employment provides that subject to satisfactory performance, employees will receive annual increments within the grade of their post. The manner in which satisfactory performance is assessed is not prescribed within the contract. Check Ins have been designed to follow a fair process to assess performance and requires a consistent application free from any discrimination or bias.

5.3. Environmental Implications and contribution to achieving a net zero carbon Islington by 2030.

- 5.3.1 There are no environmental implications

5.4. Equalities Impact Assessment

A full equalities impact assessment was completed as part of the scheme's design.

- 5.4.1. The council must, in the exercise of its functions, have due regard to the need to eliminate discrimination, harassment and victimisation, and to advance equality of opportunity, and foster good relations, between those who share a relevant protected characteristic and those who do not share it (section 149 Equality Act 2010). The council has a duty to have due regard to the need to remove or minimise disadvantages, take steps to meet needs, in particular steps to take account of disabled persons' disabilities, and encourage people to participate in public life. The council must have due regard to the need to tackle prejudice and promote understanding.

6. Conclusion

- 6.1. In conclusion we are pleased with how well received Islington Check Ins have been throughout the Council. We have been particularly pleased with the progress made to embed the new approach in all teams and service areas, particularly in front line services. As a result of working so closely with front line colleagues, Staff Forums and Trade Union colleagues we've been able to actively listen to their feedback and make improvements so that the approach is effective and meaningful.

6.2. There is still work to do for Islington Check Ins to be fully mature across our large and varied organisation, including exploring whether an online system will improve the approach for colleagues along with reporting capability. This is alongside making sure that we regularly monitor our Check In Reviews data through a lens of Equality, Equity, Diversity, and Inclusion which is an important priority set out in our current Workforce Strategy. Finally, we are beginning to explore how we link Islington Check Ins with Talent development and Succession planning.

Background papers: None

Related papers:

- Staff Performance Management and Development – report of the Policy, Performance and Scrutiny Committee 9/6/22: [Issue - items at meetings - Staff performance management and development - Report of the Policy & Performance Scrutiny Committee | Democracy in Islington](#)
- Executive report 23/3/23 : [Response to the Policy and Performance Scrutiny Committee - new approach to performance development](#)
- [Islington Together 2030](#)

Final report clearance:

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