Community Counts
Milnbank
Housing Association
53 Ballindalloch Drive, Glasgow G31 3DQ

TO:	Governance Sub-Committee
PREPARED BY:	Linda Sichi (Deputy CEO)
SUBJECT:	REVIEW OF STAFF APPRAISAL POLICY
DATE OF MEETING:	25 August 2025
APPROVED BY:	Paul Martin (CEO)

STAFF APPRAISAL POLICY

LS/August2025/REF.P60

0141 551 8131 0141 550 2060 admin@milnbank.org.uk www.milnbank.org.uk

A registered Scottish Charity No.SC039891 Registered: Scottish Housing Regulator.
Registration No. HCB 161 SC Registered: Financial Conduct Authority - 1818 R(S).
Registered under the Co-operative and Community Benefit Societies Act 2014.

STAFF APPRAISAL POLICY

CONTENTS

1. MHA's Strategic Objectives
2. MHA's Values
3. Regulatory & Legislative Compliance
4. Policy Introduction
5. Principles Staff Appraisal Policy
6. Procedure
7. Staff Appraisal process
8. Equality & Human Rights
9. Data Collection
10. Monitoring & Review of Policy

1. MILNBANK HOUSING ASSOCIATION (MHA) STRATEGIC OBJECTIVES

MHA's mission is to provide excellent homes and services in a thriving community. We believe that people living in the MHA community should:

- Have warm, safe, and affordable homes, and receive excellent services from MHA.
- Live in neighbourhoods that are clean and well cared for, with real community pride.
- Have access to opportunities and services that promote a good quality of life.

2. MHA's VALUES

Working as 'One Milnbank' so that we offer the same quality of services, support and housing to all tenants and residents.

3. LEGAL & REGULATORY COMPLIANCE

The Management Committee leads and directs MHA to ensure good outcomes for its tenants and other service users. The Scottish Housing Regulator's Regulatory Framework Financial & Regulatory, Standard 6 states that the governing body and senior officers have the skills and knowledge they need to be effective. MHA adheres to all relevant legal employment requirements associated with this policy.

4. POLICY INTRODUCTION

4.1 The main aim of Staff Appraisals is to support staff by ensuring that all employees are equipped to carry out the requirements of their job, and where necessary, identify performance improvements. The staff appraisal process is also used to ensure that in line with the Business Plan 2023/26 requirements, MHA's KPIs are achieved through the maximisation of the individual employee and team potential.

4.2 MHA recognises that Staff Appraisals for employees can improve performance through:

- Clarification of an employee's job function & role within MHA.
- Identification of training and/or support needs
- Give future direction to the job through identification of objectives.
- Build a good relationship between the employee & line manager. Providing an opportunity for employees to be involved with MHA's development and succession planning process

5. PRINCIPLES OF THE STAFF APPRAISALS POLICY

5.1 The staff appraisals provide an opportunity for staff to highlight their achievements and for Line Managers to comment on performance.

5.2 It is recognised that the best results will be achieved if the Staff Appraisal process is conducted in an atmosphere of mutual respect.

5.3 The Staff Appraisal process will assess overall achievements rather than day to day details. Held annually, the focus of the review process will be on the preceding year.

5.4 Staff Members and the Line Managers should be aware of all issues for discussion prior to the formal appraisal process (e.g., issues discussed at workplace support, function meetings, general communication within function).

5.5 The outcome of the Staff Appraisals process should be viewed as a mutual agreement on the way forward. In the event of a disagreement on the expected outcomes between the Line Manager and the employee the onus is on the Line Manager to resolve the issue to reach a mutual agreement on the way forward.

6. PROCEDURE FOR STAFF APPRAISALS

6.1 Staff Appraisals are under the auspices of the CEO's and shall be conducted annually between October and December.

6.2 MHA views Staff Appraisals as a continuous process embracing maximum flexibility and allowing for objectives, training needs etc., to be revised as internal and external factors dictate.

6.3 It is compulsory for all employees to undertake an annual staff appraisal. The staff appraisal will be supported by quarterly review sessions with the line manager.

6.4 Using MHA's electronic system, employees are asked to complete a staff appraisal form from one of the following categories:

- Manager Grade & above (Competency based, team performance and future succession planning)
- Officer Grade 2 & Senior Officer Grades (Competency based)
- All other Grades (Standard Form)

6.5 The undernoted general timescale should be followed:

- The line manager shall issue the Staff Appraisal Form and accompanying guidance no less than *7 working days* prior to the date of the review.

↓

- Employees should submit their completed forms to their Line Manager no less than *3 working days* prior to the date of the review.

↓

- The Line Manager shall conduct and record a note of the staff appraisal.

↓

- A period of 1 hour is allocated for each appraisal; however, the Line Manager and Employee should be flexible about this.

↓

- The Line Manager will provide written feedback from the appraisal. The CEO will view all forms prior to being issued to the employee. The line manager will issue the completed form, incorporating the PDP, to the Employee within *28 working days* from the date of the review.

↓

- The Employee should read, sign off and return their Staff Appraisal Form to their line manager within *7 working days* of receiving feedback. The completed Form shall be retained in employee's personnel file.

↓

- Any Employee can request a follow up appraisal and should make this request to their Line Manager within *7 working days* of receiving their form.

↓

- The Line Manager shall arrange a follow up interview within 7 working days of the employee lodging this request.

7. THE STAFF APPRAISAL PROCESS

7.1 All staff should strive to keep to the above time scale.

7.2 Employees should complete all the questions on the Staff Appraisal Form and where possible, provide examples to support their response. The Staff Appraisal Form preferred method for completing Appraisal Forms must be completed electronically.

7.3 The Line Manager may return the form to individual Members of their team requesting more details on the form prior to the review being carried out.

7.4 Employees have the right to request a follow up appraisal, and this will be held within the time scales detailed above. If an employee remains dissatisfied after a follow up meeting, then

the employee will be invited to attend a second follow up review meeting with the CEO. The Line Manager may also be present at this meeting. In all cases, the CEO will discuss the Staff Appraisal with the Line Manager prior to the follow up meeting.

8. EQUALITY & HUMAN RIGHTS

MHA's is committed to equal opportunities, and we will respond to the different needs and service requirements of individuals, and we will not discriminate against any individual for any reason outlined in Equality & Human Rights Legislation.

9. DATA COLLECTION

MHA will manage all personal data in accordance with our obligations under the GDPR regulations and the Association's Policy.

10. MONITORING & REVIEW

10.1 For monitoring, the Governance Sub-Committee receive a summary report of the outcomes of the Staff Appraisals, this is subsequently reported to the MC. This includes an overview of the KPI's for each function and training needs that have been identified, which are subsequently incorporated into the following financial year's Organisational Training & Development Plan, Budget, and Annual Staffing Plan.

10.2 The Staff Appraisal Policy shall be reviewed on an annual basis, prior to the reviews being conducted, or otherwise agreed by the Governance Sub-Committee.

FUNCTION	**EMPLOYEES**	**LINE MANAGER CONDUCTING REVIEW**
CEO's	Chief Executive Officer Deputy Chief Executive Officer	Chair/Office Bearer CEO
LINE MANAGERS	Director of Finance Director Housing & Community Initiatives Director of Asset	CEO CEO CEO
HOUSING SERVICES	Senior Housing Officer Housing Officers Housing Assistant Income Recovery Assistant	Director of Housing & Community Initiatives Director of Housing & Community Initiatives Senior Housing Services Officer Senior Housing Services Officer
COMMUNITY ENGAGEMENT	Community Engagement Co-ordinator Income Maximisation Team Community Engagement Workers Cafe Assistants	Director of Housing & Community Initiatives Director of Housing & Community Initiatives Senior Housing Services Officer Senior Housing Services Officer
MAINTENANCE	Maintenance Co-ordinator Asset Co-ordinator Maintenance Assistants Asset Admin. Assistant Inhouse Tradesmen	Director of Asset Director of Asset Maintenance Co-ordinator Asset Co-ordinator Maintenance Co-ordinator
ESTATES	Estates Supervisor Depute Estates Supervisor Estates Caretakers	Director of Asset Estates Supervisor Estates Supervisor

CORPORATE SERVICES	Senior Governance & Compliance Officer Executive Officer CS Assistants Office Cleaner	CEO CEO Deputy CEO Deputy CEO
FINANCE	Finance Officer Finance Assistant	Director of Finance Director of Finance
MPS FACTORING	Property Manager Factoring Officer	Director of Finance Director of Finance