

Your union has been in discussions with BT regarding their approach to Performance Management. This was triggered by a move to an eperformance system which removes the 'informal PiP' from the procedure, a move that is being phased in across BT. All lines of business except Fleet, Retail and Openreach are now on this new system and it is expected that Retail and Openreach will be on it from April 2009. The discussions with BT are ongoing and no agreement on the new approach has been reached.

Performance Management should be about coaching and support and should be a positive experience. We understand this is not always the case and that has been the basis of most of our discussions.

The CWU, for example, accepts that the informal PiP is an unpleasant and controversial part of the procedure but it has two advantages for you, as a member,

1) No formal action is taken with an informal PiP. Removing it therefore means that you may go straight onto a formal warning, which is the first stage of disciplinary action. However, please see point 1 '**Removal of informal PiPs**' for the steps a manager must take before moving to a formal warning.

2) Most people who are put onto an 'informal PiP' do not progress onto a formal PiP and formal warning.

The resulting discussions triggered by this move has ended up being wide ranging and the CWU still has concerns over a number of aspects of BT's Managing Performance approach. On some of these issues we have received assurances and we need your feedback to ensure that these are not being abused.

We have included an email address where you can report abuses of the procedure.

This is a 'no-reply' email address that is not an advice line. If you need advice you must contact your local branch.

BT has also confirmed that the targeting of PiPs (i.e. the bottom 10%, 25% etc) is totally unacceptable. Every time we have presented evidence that there is arbitrary targeting of PiPs, these have been removed.

If you have evidence of the targeting of PiPs, please contact your branch immediately & advise:

btperformance@cwu.org

1) REMOVAL OF INFORMAL PIPS (NB THIS ONLY APPLIES IN RETAIL AND OPENREACH AFTER APRIL 2009)

Discussions with the company led to the production of clear written guidance to managers of steps they must go through before moving to a formal PiP and formal warning. This guidance is very similar to the guidance surrounding an informal PiP. These include:

- there must be a discussion with your manager
- there must be evidence of under performance
- there must be timescales for improvement; you must be advised what improvement looks like, and what actions your manager commits to support that improvement.

If you are placed on a formal PiP, or you are informally warned about your performance and these steps have not been taken, you should contact your branch immediately.

2) AUTOMATION VERSUS VERBAL CONTACT

We have concerns that the automation of the system will lead to bad performance management with managers not having the required 1-2-1.

BT has assured us in writing that managers are required to carry out a proper review meeting and not just a telephone call or email exchange, whether the review is annual, half yearly or quarterly.

If you have an example of where this has not happened please let us know on our non-reply email address:

btperformance@cwu.org

3) GENERALLY SATISFACTORY = PIP

BT has made it clear that the only acceptable standard to them is 'Good'. 'Generally Satisfactory' therefore may now attract at least an informal discussion to improve your performance.

The CWU does not agree with this stance and has been pressing BT hard on this issue.

The best assurance we have is that a 'GS' marking will not result in an automatic formal PiP and warning.

If this has happened to you, please contact your branch for assistance but also please advise our special email line:

btperformance@cwu.org

4) 6 POINT APR

There is no change to the established APR which has a 6 point rating.

If you are currently being reviewed on any other APR form please email btperformance@cwu.org

5) SUBMISSION OF EVIDENCE

It is not compulsory to submit evidence to your APR, although both the CWU and BT agree that it is preferable that you do prepare for your APR by completing your employee review form.

We have a written commitment that a failure to submit evidence for your APR will not be the sole reason for a 'Generally Satisfactory' rating.

If you have received a 'GS' rating for this reason please immediately seek advice from your branch and also let our email line know at btperformance@cwu.org

6) LEVELLING

Levelling takes place between your 1-2-1 meeting and you being awarded your rating. Groups of managers get together to discuss the scores they are considering awarding and a discussion takes place that BT says is about ensuring consistency. Sometimes, as a result of those discussions, the score your manager was going to give you, changes.

The CWU has concerns about the lack of transparency of the levelling process. We believe that your manager should agree your rating with you and that consistency should be checked without detriment to our member.

We are continuing to debate this with BT but so far the company are not prepared to move from the current system.

Our advice is if you are unhappy with your score, you should ask whether that was applied as a result of the levelling process and for a copy of the evidence that was relied upon at the levelling meeting that resulted in your score.

Examples where you believe you have been a 'victim' of levelling will be welcomed at btperformance@cwu.org

7) FORCED DISTRIBUTION OF RATINGS

BT has confirmed that there is no forced distribution of ratings. This means that your manager cannot justify a 'Good' or '3' rating because she/he is only allowed 'x' number of 1's or 2's or that she/he must have so many people on 'GS' or 'NI' (this is targeting and completely unacceptable).

If your manager justifies your score in this way, please let us know at btperformance@cwu.org

8) MANAGEMENT STYLE AND COMPETENCIES

The CWU has concerns about the competencies of managers conducting performance reviews and believe there is a requirement for compulsory training. Managers need guidance on how and when to conduct performance reviews. For example, managers need to differentiate when performance issues are because of a health problem and use the appropriate Attendance and Managing Changing Capabilities procedures instead.

We also have concerns about management style. We are very aware that the best procedure in industry can be abused if a manager, Director, or indeed company, wish to abuse it.

Management style is an issue we hear about from you all the time and we continue to challenge BT about their management style in a number of forums as well as through the discussions on Performance Management.

Once again, if you have a concern about your performance rating or experience, you should contact your branch for advice.

We are keen to receive examples that we can highlight to BT (without naming names). You can be assured we will raise the issues with BT.

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