



## End of year ratings and appeals process - Your Rights



# Introduction

**Jim Leonard**

General Secretary



# Understanding Your Performance Rating

## **Performance Rating Components**

Ratings reflect achievements, work approach, demonstrated behaviours and risk for a comprehensive evaluation.

## **Fairness and Transparency**

Ratings are aligned with organisational standards to ensure fairness and transparency in evaluations.

## **Challenging Your Rating**

Members can challenge rating labels only. However, appeals could change just the numerical score.

## **Union Support**

Union provides support throughout the challenge process to protect employee rights and voice.



# Appeal Process Steps

**Gerry Moloney**

Assistant General Secretary



# Step 1 – Initial Discussion

## **Informal Discussion with Manager**

Initiate a constructive conversation with your manager after receiving your verbal performance rating to address concerns early if not already.

## **Review Documentation Beforehand**

Carefully review your end-of-year documentation including self-assessment and manager feedback available in Workday before the discussion.

## **Resolve Issues Collaboratively**

Aim to maintain a positive relationship and solve concerns informally, demonstrating professionalism and teamwork.

## **Next Steps if Unresolved**

If concerns remain after the discussion, prepare to proceed to the formal appeal process.



# Step 2 – Formal Appeal

## **Appeals Window and Eligibility**

Formal appeals must be submitted between 8 and 22 January by eligible employees who completed self-assessment or qualify for exceptions.

## **Scope of Appeals**

Appeals can only challenge overall rating descriptors, but can result in the numerical number changing only.

## **Impartial Review**

An independent manager outside your reporting line reviews appeals to ensure fairness and objectivity.

## **Timely Submission Importance**

Submitting appeals timely and following guidelines is essential for consideration in the formal process.

## **Speak with your Union Caseworker**

Arrange a caseworker to help guide you through this process and to attend any formal meeting.



# Step 2 – How to Submit an Appeal

## **Notify Your Manager**

Begin the appeal process by informing your manager of your intention to appeal your performance rating.

## **Contact Caseworker Support**

Reach out to the Advance office to get a caseworker assigned who will help prepare your appeal effectively.

## **Submit Appeal via Workday**

Submit your appeal with all necessary documents through the 'Performance Rating Appeal' section in AskHR on Workday.

## **Review and Fairness**

People & Culture acknowledges the appeal and assigns an independent manager to review it within 10 working days.

.



# Meetings & Decision

Keith Hoyland

Deputy General Secretary



# Step 3 - Meetings

## **Scheduling of Meetings**

An independent manager arranges separate meetings with you and your manager within 10 calendar days after your appeal submission.

## **Role of Union Representative**

You have the right to be accompanied by a union Caseworkers to ensure fairness and support during meetings.

## **Meeting Purpose**

Meetings allow both parties to present perspectives, clarify misunderstandings, and respond to questions thoroughly.

## **Importance of Step**

This step is critical for a comprehensive review before final decisions are made on the appeal.

.



# Step 4 - Decision

## **Evidence Review Process**

An independent manager thoroughly reviews all evidence including meeting notes and evaluations to assess fairness.

## **Outcome Communication**

The decision is communicated in writing within 10 days to ensure clarity and transparency.

## **Appeal Outcome Effects**

If upheld, ratings and pay adjustments are made; if not, the decision is final, ensuring closure.



# Questions



# Contact & Connect

Helpline: 01442 891122

info@advance-union.org

www.advance-union.org



# What does Advance do for members?

