Esgobaeth Llandaf
Diocese of Llandaff
Mae Ffydd Yn Cyfrif | Faith Matters

Llandaff Diocesan Board of Finance (DBF) Review, Training and Improvement Policy

October 2026

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1. Introduction

Llandaff DBF aims to support all its staff in performing to the best of their abilities, supporting continuous improvement in the carrying out of their roles and the healthy development of their individual careers.

We set out to create an environment in which improvement and development are a normal part of everyone's working lives; regular healthy 360 feedback is open, fair and friendly; and where there's a clear framework for managing any difficulties or issues with performance and supporting any development needed.

This policy lays out the normal pattern of review and feedback, the context for training and development, and the process where any further performance improvement is necessary.

2. Regular meetings and feedback

Each staff member will have regular one-to-one meetings with their line manager, usually at least once every three weeks (except when leave or unforeseen

circumstances prevent it). These meetings are an opportunity for the individual to talk through with their line manager the work and the issues they are currently focussed on, and an opportunity for the line manager to help direct and shape the work of the staff member.

These meetings are also a forum for the line manager to raise any queries or concerns at the earliest possible opportunity, and for feedback in both directions. These should be framed discursively and collaboratively as a healthy means of ensuring continuous improvement across all LDBF activity. The meetings should also include a focus on wellbeing and job satisfaction, as well as considering any training needs.

3. Annual review

Once a year, usually during February, each member of staff will have an annual review. This review follows the pattern laid out in the Annual Review form and takes the form of a conversation with the line manager, in which the principal impetus for discussion comes from the individual who is the subject of the review. The staff member will prepare for the review in advance and then make a record of the conversation during it. This record is then emailed to the line manager and retained; it will be revisited at least twice during the year to monitor progress.

In a healthy ecosystem the annual review should not surface any difficulties which have not already been raised during normal regular meetings. The review is however a useful moment to step back and take a broader view of a longer period, to spend some time recognising and celebrating what has gone well and weighing what has gone less well. It also enables a look in perspective at any themes which emerge, in particular both development and training needs, and also ideas about career development and personal growth.

Finally, job goals which set some targets within the role for the year ahead, and career goals which look at the individual's overall development and direction, are agreed.

4. Training

Llandaff DBF aims to support staff through provision of training appropriate to their role

and needs, and subject to budgetary constraints.

Mandatory training, such as safeguarding and data protection, is provided free of charge as appropriate for each role.

It may also be appropriate for individuals to seek additional training. This would be discussed and requested during an individual's regular one to one meetings with their line manager, and through the annual review process. Such training may be provided at the discretion of the Diocesan Secretary: there's no obligation for the diocese to meet the costs of such additional training, but in some cases some or all costs may be covered. This will be dealt with on a case-by-case basis, depending on the nature and purpose of the training and the budgetary constraints.

As part of the training options considered, the DBF will also look to support short-duration secondment or shadowing opportunities, or training deliverable as an in-kind donation by trustees or other individuals connected to the diocese.

5.Improving performance procedure

Continuous improvement is something LDBF sees as a normal part of professional life. The LDBF's aim is that in most cases where a specific need for improvement is identified it will be managed through regular processes of one-to-one meetings, feedback and review.

Sometimes however further intervention may be required. That procedure is laid out here:

a. Specific informal discussion

This will take place if concerns raised in normal regular meetings have not addressed issues raised. The employee's line manager will arrange a meeting with them to discuss the specific concerns, and to clearly explain what is required of them to correct and/or improve their work.

Once these concerns have been raised, the line manager should confirm this in an email to the employee, highlighting the concerns, the expected standard of work and the actions agreed to ensure that the employee returns to the required standard of performance.

Before moving on to a Performance Improvement Plan, the employee will be given the opportunity to deliver the required standards. Where the reason for poor performance

is that they do not have the required skills or knowledge then every reasonable effort will be made to help them acquire them.

If it emerges that the cause of poor performance is linked to previously undisclosed or undiagnosed neurodivergence, or as a result of an underlying medical condition, the employee will be advised of appropriate healthcare support options. If it emerges that there are personal issues affecting their work, then they will be directed to the appropriate pastoral or counselling services available to them.

b.Performance Improvement first meeting and plan (PIP)

Where there are still concerns about an individual's performance following informal discussions then more specific action will be taken.

The line manager will arrange a meeting with the employee to collaboratively draw up an agreed plan for improvement and set clear goals for sustained delivery over a reasonable time scale.

The employee will be entitled to be accompanied by a colleague or a Trade Union official as a companion, and they should consider whether to offer any mitigation for their underperformance, e.g. illness, workload, stress (at work or at home). Any mitigation which they offer will be taken into account.

A written record of all meetings conducted under this procedure will be made, either by the person holding the meeting or by an additional person arranged by LDBF to take notes.

After the meeting, the line manager will usually issue the employee with an Improvement Note, which is the equivalent of a First Written Warning. This will remain live on their record for six months.

The Performance Improvement Plan drawn up at this meeting will contain all the objectives for improvement which the individual must achieve, and provide a timescale for each one. If the line manager is satisfied that any mitigation offered is a reasonable explanation for the underperformance, they may decide that an Improvement Note is not necessary at this stage. However they should continue to follow the informal stage of the Underperformance process, alongside providing any support which they may be able to offer.

Delivery of improvements against the PIP will be monitored through regular meetings between the employee and their line manager during the agreed period.

c.Improvement or continuing unsatisfactory performance second meeting

If following a warning the employee achieves and maintains satisfactory standards of work in line with the PIP, their line manager will advise them in writing that the procedure is no longer being applied and that their HR record will be updated to reflect this. If there is early satisfactory and sustained improvement their line manager may decide that the specified monitoring period no longer needs to run its full course and will notify them in writing.

If the PIP does not lead to a satisfactory improvement in an individual's performance, they will be invited to a second performance management meeting. This will follow the same format as the first meeting, and they will again have the right to bring a colleague or Trade Union representative as a companion.

After the meeting, the line manager will usually issue the employee with a Final Written Warning, which will be accompanied by a second Performance Improvement Plan. The Final Written Warning will remain on their record for 12 months.

If the line manager is satisfied that any mitigation offered is a reasonable explanation for the underperformance, they may decide that an Final Written Warning is not necessary at this stage. However they should continue to manage the underperformance in accordance with the first Performance Improvement Plan, adjusting timescales appropriately and providing any support which they may be able to offer.

d.Performance improvement final meeting

At the end of the second Performance Improvement Plan, the employee will be invited to a final formal meeting to discuss their underperformance. This meeting will follow the same format as previous meetings, and they will again have the right to bring a colleague or a Trade Union representative as a companion.

At the meeting, the line manager will consider whether the employee has made sufficient progress in line with their Performance Improvement Plan. Again, any mitigation will be taken into account.

At that meeting or shortly after, the line manager will confirm one of three possible outcomes to the employee:

i. their performance has improved sufficiently, and they will return to normal levels of performance management

ii. their performance has improved, but not enough to end the process. In this case, their second Performance Improvement Plan will be extended, for an additional period of up to six weeks

iii. their performance has not improved sufficiently, and they have not offered appropriate mitigation for this. In this case their line manager will consider whether they are able to offer any alternatives to dismissal, e.g. demotion or removal of responsibilities. If no alternatives are identified, the employee will be dismissed with notice.

e.Appeal

Every employee has the right of appeal against any formal sanction issued under stages 2 or 3 of the performance improvement procedure. They should write to the Diocesan Secretary, or if the Diocesan Secretary is their line manager, to the Chair of the DBF, setting out the grounds for their appeal, within ten working days of receipt of their formal sanction.

They will be invited to a formal appeal meeting, where they will have the opportunity to outline the grounds for their appeal. They will be entitled to bring a colleague or a Trade Union representative to the appeal meeting.

The outcome of the appeal will be confirmed to the employee in writing, explaining the grounds on which the decision was reached. The outcome of the appeal will be final.

f.Support

At all stages of the performance improvement process, the Diocesan Board of Finance will seek to offer appropriate support to help employees to improve their performance. Such measures may include: training; additional supervision; the reallocation of other duties; or the provision of additional support from colleagues.

END OF POLICY

VERSION HISTORY

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