

Capability

This case study will help you:

Identify what action should be applied in cases of under-performance.

Understand how the processes should be followed.

Background Information

Tom is an Administrative Assistant who transferred 6 weeks ago from an office role to a Contact Centre.

Tom has completed induction arranged by Mary, his manager. He has undertaken necessary training and has discussed and agreed his new objectives. One of his responsibilities is to ensure that all filing for his section is complete. However, there have been recent complaints from the team that documents are being misplaced or filed incorrectly.

Mary has also noticed today that there is a backlog of work building up at his desk.

What does the manager need to consider?

Does Tom understand what is meant by an acceptable level of performance, what his objectives are and what he has to do to meet them?

Did he cope with the recent training he was given? Were there any concerns and if so, have these been acted on?

Does he have a disability that has been overlooked and that may be affecting his work performance?

Is there a link to health issues? In that case, advise him to consult his own doctor and, with his consent, refer for occupational health advice.

Has something at home affected his performance at work?

What support does the manager offer?

Mary should talk to Tom to tell him of her concerns, giving specifics and to try and identify the cause for the dip in his performance. Underlying problems should be considered, and she must ensure the standards set are reasonable.

She should ensure he understands what is required, encourage him to reach and maintain the necessary standards and arrange remedial training and consolidation.

Mary should explain that if the required standard is not met, action will be taken in line with the Council's Capability Policy.

Mary concludes that there are no underlying problems affecting Tom's work. She has spoken with Tom to identify the performance issues. Tom is concerned that the amount of filing he receives is much higher than usual and

the backlog is shared out equally amongst the rest of the administration team. Despite this Tom's performance remains unacceptable.

Performance does not improve- move to take action under the Capability Policy.

Mary invites him to interview in 3 days time.

At the interview Mary explains that Tom's work performance is still below the acceptable standard. During the discussion Tom admits that the filing system differed from what he was used to and didn't fully understand what to do. He didn't mention it before because he was afraid of looking foolish.

Mary arranges for Tom to job shadow an experienced Administrative Assistant for a day. She sets a review period for one week and issues an oral improvement warning. Mary makes a full written record of the discussion to Tom. Tom signs and returns one copy.

Tom's job shadowing takes place the next day and he is allocated a mentor to help him for the rest of the week. His work performance quickly improves.

The review meeting is conducted a week later. Mary explains that she is pleased to see a marked improvement in Tom's performance and asks if he has any further concerns. As Tom's performance has improved to an acceptable level, Mary tells Tom that action has concluded but should his performance dip again during the next 12 months the action will resume.