



Stronsay Development Trust (hereafter called SDT)

## Staff Supervision and Appraisal Policy

### 1. Purpose

Stronsay Development Trust (SDT) is committed to supporting staff through effective supervision and appraisal. These processes are essential to ensuring staff are supported, organisational objectives are achieved, and high standards of work are maintained.

Supervision and appraisal provide an opportunity for staff and managers to review performance, discuss challenges, identify development needs, and ensure that staff have the resources and support required to carry out their roles effectively.

The Board of Trustees recognises its duty of care as an employer and aims to ensure that all staff receive regular, constructive support and feedback.

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### 2. Principles

Supervision and appraisal within SDT aim to:

- Support staff in carrying out their roles effectively and confidently
  - Provide a structured opportunity to review work, priorities and workload
  - Identify training, development and support needs
  - Promote open communication between staff and management
  - Ensure staff understand organisational policies, expectations and objectives
  - Monitor progress against agreed work plans and objectives
  - Promote continuous improvement and professional development
  - Ensure staff wellbeing is supported in the workplace
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### 3. Supervision

Supervision is a regular, structured meeting between an employee and their line manager to review work progress, discuss any issues, and plan future priorities.

Supervision meetings provide a confidential space for staff to discuss:

- workload and priorities
- progress on projects and objectives
- training and development needs
- workplace challenges
- wellbeing and support needs
- administrative matters such as leave, TOIL and expenses

Supervision meetings should be supportive, constructive and focused on ensuring staff can perform their role effectively.

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## 4. Line Management Arrangements

The Community Development Officer (CDO) and any staff with line management responsibilities will receive supervision from a **nominated Trustee**.

The supervising Trustee will confirm to the Board that supervision meetings have taken place and raise any relevant operational matters where appropriate.

All other staff will receive supervision from the **CDO or designated line manager**.

Trustees retain overall responsibility for the governance and oversight of the organisation.

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## 5. Supervision Frequency

Supervision will normally take place:

**During probation:**

- Every 4 weeks

**After successful completion of probation:**

- At least every 3 months (or more frequently if required)

Additional supervision meetings may take place where additional support or guidance is needed.

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## 6. Appraisal

The appraisal process provides an opportunity for staff and their line manager to formally review performance and development.

Appraisals are designed to:

- review achievements over the previous period
- assess progress against agreed objectives
- identify training and development needs
- discuss future priorities and objectives
- support career development where appropriate

New employees will normally receive an appraisal at the end of their **probation period (usually 6 months)**.

Following this, staff will receive a **formal annual appraisal**.

Supervision meetings throughout the year will monitor progress against agreed objectives.

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## 7. Performance Assessment

Performance will normally be assessed using the following framework:

### **Exceeds Expectations**

Performance significantly exceeds the requirements of the role.

### **Meets Expectations**

Performance consistently meets the required standards of the role.

### **Development Required**

Some objectives have not been fully met and additional support or development may be required.

### **Unsatisfactory**

Performance falls below the required standard and improvement is necessary.

Where performance concerns arise, appropriate support and guidance will be provided in line with SDT policies.

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## 8. Record Keeping

A written record of supervision and appraisal meetings will be kept.

Copies will normally be held by:

- the employee
- the line manager
- the employee's personnel file

Records will be stored securely in accordance with SDT's **Data Protection and Confidentiality policies**.

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## **9. Confidentiality**

Discussions during supervision and appraisal are confidential between the employee and the line manager. However, issues may be shared with the Board where necessary for operational, governance or safeguarding reasons.

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## **10. Policy Review**

This policy will be reviewed periodically to ensure it remains effective and reflects current employment legislation and best practice.