

Accord

CHALLENGING YOUR MID-YEAR RATING A GUIDE FOR MEMBERS IN LBG

It is vital that you are appraised properly and that your rating fairly reflects your performance. Your mid-year performance rating is an important indication of how you are progressing towards your year-end rating which can influence career progression as well as your pay and bonus.

It can also have an impact on your potential job security (if you're in scope for any of the current simplification projects) and may influence future promotion opportunities.

SUPPORT FROM ACCORD

For advice and assistance get in touch with your workplace Rep or, if you don't have one, contact one of the union's officers. [Click here for union officers.](#)

SHOULD I CHALLENGE MY RATING?

If you're unhappy with the rating you should challenge it, particularly if:

- proper reviews have not taken place during the first half of the year
- the review and rating do not match the feedback given
- the review is not a full and balanced reflection of all aspects of your performance
- your manager offers inaccurate and/or insufficient evidence to support the rating decision
- your line manager has been identified with known capability or under-performance issues, which has impacted his/her ability to conduct a satisfactory review

There may also be issues where you have been promoted, transferred, ill or on maternity leave for part of the year which should be taken into consideration.

For more information, visit the performance management site on LBG's intranet.

YOUR MID-YEAR
PERFORMANCE
RATING MAY IMPACT
YOUR CAREER
PROGRESSION AND
JOB SECURITY. IF
YOU THINK YOUR
RATING IS UNFAIR
YOU SHOULD
CHALLENGE
IT.

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HOW DO I CHALLENGE MY RATING?

In the first instance you should raise your concerns with your line manager as soon as possible. In most cases your line manager should be able to sit down with you and discuss the rationale for the rating and see if an agreement can be reached.

If you want to talk your case over with someone from Accord, please contact your local Rep or Officer who will be able to give you advice on how best to get your case across.

If the issue can't be resolved in this way, you'll need to use the bank's grievance policy and procedure.

- You can download the grievance policy [here](#).
- You can download the grievance procedure [here](#).

An independent hearing manager will investigate your case, ensure your concerns are fully explored and seek views from appropriate line managers.

IF YOU CAN'T RESOLVE YOUR CONCERNS ABOUT YOUR RATING WITH YOUR LINE MANAGER, YOU WILL RECEIVE FULL SUPPORT FROM ACCORD AS WELL AS REPRESENTATION WHEN YOU LODGE YOUR GRIEVANCE AND AT THE APPEAL STAGE IF IT GOES THAT FAR.

You can choose whether to have your case heard at a meeting, which should be within 21 calendar days of your grievance letter being received, OR you can submit your evidence in writing and have the matter investigated from your written document. If you decide on a hearing, you are entitled to Accord representation at the meeting.

If you're unhappy with the outcome you will have the right to appeal—see the policy & procedures for further details.

Accord will provide support to all members who wish to challenge their mid-year performance rating. Call **0118 934 1808 (option 1)** or email info@AccordHQ.org

WWW.ACCORD-MYUNION.ORG

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