

Capability Policy

Which template should I use for which meeting?

Each template is numbered and a description provided to make it easier for you to identify the one to use. You **must** ensure you use the **correct template** therefore if you are unsure of which one to use, refer to the details below:

<u>Template number</u>	<u>Name</u>	<u>When to use it</u>
CAP1	Invite to formal review	<p>You have discussed performance issues with your employee and covered the initial considerations as outlined in the Capability policy, however you still have concerns that your employee is not achieving the performance standards required. You need to invite them to attend a formal review meeting to discuss the performance issues and agree an action plan (include copy of Action Plan template).</p> <p>(Ensure, where you are able, you discuss and agree a date with your employee prior to sending out the letter to avoid any unnecessary delay in the process)</p>
CAP2	Outcome of fromal review	<p>You have held a formal review meeting and need to provide the outcome details of the meeting to your employee along with a copy of the agreed action plan.</p>
CAP3	Invite to Formal Mid Review	<p>Your employee is on formal capability review and you need to hold a formal mid review meeting to discuss progress and assess where your employee is in relation to their action plan.</p> <p>(Ensure, where you are able, you discuss and agree a date with your employee prior to sending out the letter to avoid any unnecessary delay in the process)</p>
CAP4	Outcome of Formal Mid Review	<p>You have held a formal mid review meeting and need to write to your employee with the outcome of your discussions.</p>
CAP5	Invite to End Review Meeting	<p>Your employee is coming to the end of the formal capability review period and you need to write to</p>

		<p>them to invite them to an end of review meeting to discuss their progress and agree the next stages.</p> <p>(Ensure, where you are able, you discuss and agree a date with your employee prior to sending out the letter to avoid any unnecessary delay in the process)</p>
CAP6	<p>Outcome from End Review Meeting</p> <p><i>Speak with your local HR Consultant who can support you with writing your outcome letter.</i></p>	<p>You have held an end of review meeting and discussed the progress of your employee in improving their performance. You have agreed the next stage of the process and need to write to your employee to confirm this and the discussions from the meeting.</p>
CAP7	<p>Invite to Stage 3 Final Review Meeting</p>	<p>You are Chairing a Final Review meeting in relation to an employee's capability. You need to send an invite letter to an employee to let them know about the date, location, and details of the meeting along with including copies of the Management Statement of Case OR are a Manager who needs to let your employee know about the date, location, and details of the meeting along with including copies of the Management Statement of Case</p> <p><i>(Note. this letter should be sent at least 7 calendar days before the date for the Final Review meeting)</i></p> <p>(Ensure, where you are able, you discuss and agree a date with your employee prior to sending out the letter)</p>
CAP8	<p>Outcome of Final Review Meeting</p> <p><i>Speak with the HR professional on the panel who can support you with developing your outcome letter.</i></p>	<p>You have Chaired a Capability Final Review meeting and need to provide the employee with the details and outcome of the decision taken by the panel.</p> <p><i>(Note. This letter must be sent within 7 calendar days of the date the Final Review Meeting took place).</i></p>
CAP9	<p>Report Template for Management Statement of Case</p>	<p>You need to attend a Stage 3 Final Review Meeting and will be presenting details of the capability process to date for your employee.</p> <p>You need to complete a report to provide to your employee and the panel for consideration.</p>
CAP10	<p>Outcome of Appeal Panel Meeting</p>	<p>As the manager identified to hear the appeal you should use CAP10 to confirm the outcome to the employee</p>