



Supervision, appraisal, and development Procedure

December 2025





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1. Introduction

- 1.1. This procedure outlines steps that Bield Housing & Care has put in place to support professional supervision, annual appraisal and development for its staff.
- 1.2. It aims to ensure alignment with organisational values, regulatory compliance, and a culture of continuous improvement.

2. Purpose

- 2.1. This procedure explains Bield Housing & Care's approach to professional supervision, annual appraisal, and training. It aligns with the Care Inspectorate Quality Framework (Key Question 3 and Key Question 4), which requires services to demonstrate structured, well-recorded supervision and ongoing development of staff competence
- 2.2. It ensures staff are supported in their roles, receive constructive feedback, and have access to development opportunities, enabling high-quality, person-centred care.

3. Scope

- 3.1. This procedure applies to all care staff, including those responsible for supervising or appraising others and those participating in these processes.

4. Context

- 4.1. This procedure supports the principles of the Scottish Government's Fair Work Framework, promoting effective voice, opportunity, security, fulfilment, and respect within the workplace.
- 4.2. This commitment aligns with other key frameworks and standards, including:
 - The SSSC Codes of Practice, which provide clear guidelines on professional conduct and responsibilities for care workers and their employers. (SSSC Codes of Practice)
 - Health and Social Care Standard 3.14, which states: "I have confidence in people because they are trained, competent and skilled, are able to reflect on their practice and follow their professional and organisational codes." (Health and Social Care Standards)
 - The SSSC Steps into Leadership Programme, which promotes broader understanding and application of supervision to develop leadership skills. ([Steps into Leadership](#))
- 4.3. Bield Housing & Care is committed to fostering an environment that:
 - Supports staff and managers in establishing and maintaining safe working practices.
 - Provides appropriate support and training for staff.



- Ensures a clear understanding of roles and responsibilities.
- Prioritises the delivery of high-quality, person-centred care.
- Ensures supervision and appraisal are delivered in line with the Equality Act 2010 and Bield Housing & Care's Equalities and Inclusion Policy

4.4. All the above frameworks ensure that our staff are equipped with the tools and knowledge needed to deliver effective care and that they are continually encouraged to reflect on and improve their practice.

5. Definition

5.1. **Professional Supervision:** A structured process aimed at supporting staff in reflecting on their practice, identifying areas for development, and fostering accountability.

5.2. **Appraisal:** A formal annual review of an employee's performance, achievements, and development needs.

5.3. **Development:** Ongoing learning opportunities (mandatory and elective) that enhance skills and competence, supporting both organisational and professional standards

Key Responsibilities

5.4. **Staff Members** should engage actively in supervision, appraisals, and training opportunities.

5.5. **Supervisors/Managers** will provide supportive and outcome-focused supervisions and ensure appraisals are conducted on time and meet organisational standards. They must ensure supervision and appraisal records are completed accurately, stored securely, and made available for audit in line with the SSSC Codes of Practice for Employers

5.6. **Training Leads** will facilitate access to relevant learning opportunities within and out with the organisation.

6. Mandatory procedures

Professional supervision

6.1. Supervision is a crucial part of supporting professional growth and ensuring well-being in the workplace. It provides:

- A structured opportunity to reflect on practice.
- A forum to address challenges in a supportive environment.
- A platform to set goals for future development.



- 6.2. Through regular supervision, staff can ensure that their work remains aligned with Bield Housing & Care's values and expectations, fostering high-quality, person-centred care. Supervision sessions are typically held every 12 weeks, although new or less experienced staff will have more frequent sessions to ensure adequate support is in place. Supervision frequency may increase based on risk assessment, support needs, or performance concerns
- 6.3. These meetings serve as a platform for reflecting on successes, identifying areas for improvement, and collaboratively addressing any challenges staff can face in their roles. Supervisors play a crucial role in guiding these discussions, helping staff to identify solutions and opportunities for growth.
- 6.4. Before attending a supervision session, staff should take time to prepare by considering the following:
- What has been going well in your work? Highlight accomplishments that demonstrate your contributions to Bield Housing & Care's goals.
 - What challenges or obstacles have you encountered? Identifying these helps to address them constructively during the session.
 - What training or resources might help you overcome challenges and further develop your skills? Proactively identifying these needs ensures supervision is effective.
- 6.5. During supervision, the discussion will be structured yet flexible, providing room to explore both professional and personal support needs. Managers will work with staff to ensure that their practice aligns with organisational objectives while also encouraging individual personal development. Conversations may cover areas such as:
- The quality of care provided.
 - Teamwork and communication within individual roles.
 - Adherence to organisational policies, including Health & Safety and Infection Control standards.
- 6.6. A record of each supervision session will be documented using Bield Housing & Care's supervision template (Appendix 1). This is to ensure there is a clear summary of the topics discussed, agreed actions, and any follow-up required. Both the staff member and their manager will review and agree on these records to maintain accountability and track progress. Supervision discussions are confidential except where information must be shared to protect safety, fulfil safeguarding duties, or comply with legal or regulatory obligations



Guidance for Supervisors

- 6.7. To ensure effective and consistent supervision across Bield Housing & Care, managers are expected to adopt a structured approach to supervision practice, incorporating the following best practices:
- **Active Listening & Reflective Discussion** – Creating a safe space where staff feel heard and can reflect on their practice openly. Managers should use techniques such as open-ended questioning and summarising to encourage meaningful conversations.
 - **Clear Goal Setting & Development Planning** – Each supervision session should include a discussion on individual goals, performance development, and support needs.
 - **Consistency & Documentation** – Follow Bield Housing & Care’s PDP framework by recording key discussion points, agreed actions, and follow-up (Appendix 2).
 - **Constructive Feedback** – Provide balanced feedback through recognition of strengths and offering guidance on areas for improvement.
 - **Encouraging Professional Growth** – Use supervision as a platform to signpost training opportunities and discuss career aspirations.
 - **Wellbeing check-ins** - Supervisors must incorporate wellbeing check-ins to support healthy working practices and prevent stress or burnout
- 6.8. As part of their own professional development, managers are encouraged to read and reflect on the SSSC Supervision Learning Resource which can be accessed at <https://stepintoleadership.info/assets/pdf/SSSC-Supervision-learning-resource-Sept-16.pdf>.

Annual Appraisal

- 6.9. Annual appraisals provide a valuable opportunity to formally review an individual’s contribution over the past year and to plan for the coming year. The process is designed to ensure staff feel recognised and supported while identifying ways to grow within their role. Appraisals also help align individual goals with the broader objectives of Bield Housing & Care. Appraisal findings will help inform service improvement planning and learning needs analyses to support organisational development.
- 6.10. The process begins with a self-evaluation, where staff are encouraged to reflect on their experiences and achievements. They are asked to consider the following:
- How has your work contributed to the service? Think about specific successes that demonstrate your impact.
 - What challenges have you faced, and what could have been done differently to overcome them? Bield Housing & Care have a reflective practice tool that may help you with this.



- What training and development needs have you identified that will help you grow professionally? Recognising and documenting these will help you to evidence your SSSC CPL requirements.

6.11. The appraisal meeting itself is a one-to-one discussion between a staff member and their manager. Together, both will review key aspects of performance, including:

- The quality of care provided, ensuring each staff member's work meets the Health and Social Care Standards.
- A staff member's ability to communicate and collaborate effectively within their team(s).
- How they have adapted to challenges and upheld organisational standards, such as Health & Safety and Infection Control policies.

6.12. These conversations provide an opportunity to celebrate achievements while setting clear goals for the future. At the end of the appraisal meeting, each staff member together with their manager, will develop a Personal Development Plan (PDP) outlining agreed goals, training requirements, and any additional support needed. This plan serves as a roadmap for the coming year, ensuring that their individual professional and personal development remain on track. The discussions and outcomes of the appraisal will be documented in the Appraisal Meeting Record, which both staff and managers will sign to confirm mutual understanding and commitment.

6.13. PDP goals will be reviewed quarterly during supervision to ensure progress remains on track and goals are updated as needed

Development

6.14. Training is one of the main pillars of professional development and ensures that all staff are equipped with the skills and knowledge necessary to deliver high-quality, person-centred care. This includes both mandatory training required for compliance and additional learning opportunities that support professional growth.

6.15. Bield Housing & Care's mandatory training is designed to ensure that all staff meet the minimum standards for safety, care delivery, and regulatory compliance. These activities include, but are not limited to:

- Medication administration training to ensure the safe handling and delivery of medicines.
- Moving and handling training to protect both staff and those receiving care from injury.
- PPE and handwashing training to uphold infection control standards.



- 6.16. In addition to mandatory training, Bield Housing & Care offers various opportunities for further development using our online learning platform Academy 10. The platform provides access to targeted learning modules tailored to the needs of Health and Social Care professionals.

Induction

- 6.17. New staff must apply for SSSC registration within three months of employment, in line with regulatory requirements

- 6.18. Shadow shifts are a key part of Bield Housing & Care's induction programme for new staff. These shifts allow staff to observe and practice care delivery under the guidance of experienced mentors, building both confidence and competence within their role. The shadowing process is structured as follows:

- **Pre-shadowing calls:** Provide an overview of expectations and prepare staff for the experience.
- **Shadowing sessions:** Typically include 2-3 shifts:
- **Observation shift:** Staff will observe how care is delivered and take note of best practices.
- **Hands-on shifts:** Staff will gradually take on more responsibilities under supervision.
- **Post-shadowing calls:** Offer an opportunity to reflect on experience, discuss feedback, and identify further learning needs.

- 6.19. Shadow shifts are a valuable opportunity to bridge the gap between theoretical knowledge and practical application, ensuring that staff feel supported as they transition into their roles. Training and development opportunities are continuously supported through structured reviews during the probation period including:

- Weekly check-ins during the initial stages of employment.
- Formal meetings at 4, 8, and 12 weeks to assess progress and identify additional training needs.
- Ongoing personal development planning to align individual growth with organisational goals.

Expanded Training & Development Opportunities

- 6.20. In addition to mandatory training and induction, staff are encouraged to explore further professional development opportunities that align with their role and career aspirations. They should discuss any training interests or requests with their manager so that both can ensure that their learning aligns with both personal and organisational development goals. Options supported by Bield Housing & Care include:



- **Self-Directed Learning** – Staff have access to a range of optional e-learning modules via Academy 10, offering training on leadership, communication, and specialist care topics.
- **External Training Support** – Staff may request funding support for external training relevant to their role, subject to approval during their supervision or appraisal discussions.
- **Specialist & Leadership Development** – Where agreed, staff can apply to participate in leadership training via the SSSC Steps into Leadership Programme, information available at <https://www.stepintoleadership.info/>
- **Continuous Learning Culture** – Personal Development Plans (PDPs) should incorporate both mandatory and elective training opportunities to support ongoing career progression.

6.21. By investing in their staffs training, Bield Housing & Care ensures that everyone is prepared to meet the challenges of their roles while contributing to a culture of continuous improvement. If staff have specific training needs or suggestions, these should be discussed with their manager.

Structured Feedback Process

6.22. To ensure the continuous improvement of our supervision and appraisal processes, Bield Housing & Care are committed to implementing a method of providing staff with the opportunity to feedback on their experience of supervision and appraisal and for them to provide suggestions for improvement. This includes:

- Inviting staff to provide feedback during supervision and appraisal reviews.
- Managers undertaking periodic surveys within their service to enable them to gather insights on the effectiveness of supervision and appraisal experiences.
- Using feedback received to identify trends, address common concerns, inform training initiatives and make improvements to procedures where necessary.

Diversity and inclusion in supervision and appraisal

6.23. Bield Housing & Care is committed to ensuring supervision and appraisal processes are inclusive and supportive of the diverse workforce that exists across the organisation. Managers will implement reasonable adjustments in line with the Equality Act 2010 to ensure supervision and appraisal processes are accessible and equitable.

6.24. To uphold this commitment, Bield Housing & Care will ensure:

- Managers receive guidance on creating an equitable and supportive supervision environment that considers cultural, neurodiverse, and accessibility needs.



- Staff have access to equality & diversity training to ensure that supervision and appraisal conversations are free from bias and promote a positive, inclusive culture.
- Where appropriate, alternative methods (such as remote supervision, additional time allowances, or adapted communication methods) will be provided to accommodate the diverse needs of its workforce.
- That supervision and appraisal processes actively support the career progression of all Bield Housing & Care's staff, ensuring equitable access to training, leadership pathways, and development resources.

7. Monitoring and review

- 7.1. The implementation of this procedure will be monitored through regular reviews and updates. Feedback will be gathered from staff to inform improvements, and supervision and appraisal records will be audited annually to identify trends and areas for development. Findings from external inspections, internal audits, and complaints outcomes will also inform revisions to this procedure
- 7.2. Regular team meetings will include discussions about training and development opportunities to ensure continuous improvement.

8. Source information used to support development of procedure

- Health and Social Care Standards: Health and Social Care Standards
<https://www.gov.scot/publications/health-social-care-standards-support-life/>
- SSSC Supervision Learning Resource <https://stepintoleadership.info/assets/pdf/SSSC-Supervision-learning-resource-Sept-16.pdf>
- SSSC Codes of Practice: [SSSC Codes of Practice](https://www.sssc.uk.com/the-sssc-codes-of-practice/) <https://www.sssc.uk.com/the-sssc-codes-of-practice/>
- SSSC Steps into Leadership Programme: Steps into Leadership
<https://www.stepintoleadership.info/>
- Equality Act 2010
Source: <https://www.legislation.gov.uk/ukpga/2010/15/contents>
- Fair Work Framework
Source: <https://www.fairworkconvention.scot/the-fair-work-framework/>



Appendix 1 Bield Supported Living Supervision

Supervisee _____ Supervisor _____ Date _____

Key updates from last supervision

Action	Update	Any Further Action Required



Discussion points for supervision

Area for discussion	Action	Timescale and support required



HR/staffing updates/concerns

Update/concern	Action	Timescale and support required

Learning and development

Learning and development	Action	Timescale and support required



Learning and development	Action	Timescale and support required

Annual leave

Annual leave planned	
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Sickness Absence

Sickness absence	
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Well Being in the workplace

Any concerns	
Any good news stories	

Signed supervisee _____ Signed supervisor _____ Date _____



Appendix 2 Bield Housing & Care PDP Framework

Bield Housing and Care PDP Framework

Appraisal
Appraisee _____ Appraiser _____ Date _____

Alignment with Corporate Strategy

Do you feel that your Job Description is accurate and describes your post well?	
Care service only Does your service have a development plan and do you feel that it reflects the purpose and direction of your service?	
<p>‘Setting the Pace... Our people, Our Homes, Our Communities’ is Bield’s Corporate Strategy and Business Plan. This plan has 12 Corporate Priorities, and each Directorate is responsible for delivering a number of these priorities.</p> <p>For the Customer Experience Directorate, our priorities are</p> <ul style="list-style-type: none">• Needs and Expectations• Customer Services <p>Please note down how you feel you contribute to these priorities</p>	



Key Achievements

Key Achievements Over the past year	Any further learning linked to this achievement	When would you like to achieve this?
<i>Eg SVQ Level 3</i>	<i>Learn more about dementia</i>	<i>September 20XX</i>

Goals for year ahead

Goals for the year ahead	What support is required to achieve these?	When would you like to achieve this?
<i>Eg Course on dementia</i>	<i>Eg Guidance on training, links from training and development, time to study</i>	<i>Eg September 20XX</i>



Goals for the year ahead	What support is required to achieve these?	When would you like to achieve this?

Ideas for change

Do you have any further ideas for the development of the service that you work in?	
If you were managing the service are there any changes that you would make?	
What changes could be made to help you in your role - for example IT/Training	
What do you enjoy most about your job and how would you encourage people to come and work for Bield?	



Managers Comments

Team Leader/Head of Service Comments

Thankyou for completing your appraisal. This will be reviewed every quarter when you will have the opportunity to review your goals and set new ones if you feel that they need adjusted.

Signed :

Appraisee

Date:

Signed:

Appraiser

Date:



Speaking your language - we are happy to translate our policies on request.

يمكن ترجمة سياساتنا عند الطلب
إذا كنت بحاجة إلى مساعدة ، فيمكننا توفير مترجم

**Nasze zasady mogą być przetłumaczone na żądanie.
Jeśli potrzebujesz pomocy, możemy zapewnić tłumacza**

**我们的政策可以应要求翻译。
如果您需要帮助，我们可以提供翻译**

ہماری پالیسی کا درخواست پر ترجمہ کیا جاسکتا ہے۔
اگر آپ کو مدد کی ضرورت ہو تو ہم ایک ترجمان فراہم
کرسکتے ہیں