

One to One Meeting Record

1. Personal Details

Name:	Robert Daily
Line Manager:	Andrew Daley
Date of meeting:	9 November 2009, Glasgow MC
One to One period covered:	Last 3 months
Next 1-2-1 date/location	

2. Update – Priorities met (action points from previous 121)

Evidences which Behaviours

<p>The following requirements/action points have been met; (bullet points)</p> <ol style="list-style-type: none"> 1. Taken over Raymond’s ex cases, and have registered these via the SRA system, progressing towards PF prosecution. 2.

3. Line Managers comments & Comments on Line Manager ('360' feedback)

Quarterly Performance Marking-to date

<p>Line Manager’s Comments: Following my meeting with Robert, I found that he is a motivated member of the security team. He has taken over some difficult cases from Raymond. One case is fairly intricate and has taken to bring to fruition. None of Raymond’s cases were reported to the PF, so Robert is under pressure to register them with the PF, (on-line) and progress them to the point of prosecution. He is doing very well processing the stagnant cases and the fruits of his labour will show in the new year, although PF cases take ages to prosecute, once it’s handed over to the PF. Robert also has good ideas and is very motivated. Robert took the opportunity to liaise with the PF and establish whether the PO Fraud Strand can assist them with a different type of report, etc. He is awaiting a date to meet with the PF. It is also clear that he has a good working relationship with his local CM, Brian Trotter. Robert has at least double the amount of cases, due to volume of cases raised in Scotland and the size of Scotland. Robert is the only investigator in Scotland. This has placed him under some pressure but he is coping well. Robert has such a good relationship with the CM’s and other PO staff, these cases find their way to him, once detected. I will get the rest of the team to also take on more workload in the Scottish region, so that Robert is not overloaded. Robert does not wish to study a MSc course at present, rather allowing the younger staff members to take up studies. However, he is eager to attend internal courses and or short courses. His positive ,ready to go-problem solved’ attitude is refreshing. Although Robert has indicated that he has been through a learning curve, it appears that he has come out on the other side of the curve as a shining example to his fellow investigators.</p> <p style="text-align: right;">[X – Half Year]</p>
--

4. Progress against Personal Objectives (To identify issues which may hinder successful completion and corrective action required, highlighting changes from last 1:1 in achievement, progress against milestones and issues)

Objective	Progress since last meeting	Next milestone	Status /Deliverable action date(s)GAR
Involved in customer engagement across geographical areas by attendance of and presentation to their monthly team meetings for; <ul style="list-style-type: none"> • Network @ Contracts Advisor meetings • Crown estate @ Contracts Advisor meetings • Field Support Teams @ Regional Team Leaders meetings 	See Behaviours attached. Presentations to 2 FA teams.		
Assisting with all Fraud Risk activities during 2009 and furthering the <ul style="list-style-type: none"> • Crown Office Initiative 	See behaviours		Ongoing
Reduce physical attacks, (i.e. robbery and burglary) against the network to keep the losses within £1,75million. Reduce physical attacks, (robbery) against the Supply Chain's Cash In Transit operation, in order to ensure that these losses are within the £850K appetite.	See Behaviours		March 010
Achieve all targeted compliance of investigative work by adherence to the standardisation of cases and end to end processes.	21 cases on hand See cases on hand update and feedback/notes of 121, as attached to this form.		Ongoing
Fully demonstrate that the business processes/objectives are still met, whilst ensuring that the most cost effective method of travel and/or overnight accommodation during 2009/10, by more effective use of all tools available to them (pool cars/hire cars/independent hotel booking services/web conferencing/telephone conferencing.) To reduce T&S costs for 2009/10 to within budgetary targets.	See behaviours		Ongoing

Recovery of 40% of monies from investigations conducted to have a positive return rate against investigation element of team	Exceeding target, see Excel data attached.		Ongoing

5. || Personal Development (progress against PDP / Performance Standards and new learning experiences planned or identified)

<u>Action</u>	<u>Progress</u>	<u>Next milestone</u>
1. Develop the required ongoing investigative skills 2.	1) Not on any courses at present	

6. || Recognition (personal/team/other colleagues) & **Team issues** (top performer, who needs most development, how are you motivating and coaching your team)

Crown your colleague, Robert was nominated by Diane Matthews
--

7. Review of Behaviours/Action, identify a behaviour to discuss and provide examples (choose two from the following, I create value for customers, I own performance, I take action, I work with others to win, I engage and involve, I support, develop and challenge)

NAME Robert Daily

Behaviour Evidence/Examples 2009/2010

Behaviours

Evidence/Examples

I CREATE VALUE FOR CUSTOMERS

High Level Description: To create value for your customers you will know who they are, what is important to them and how you can best meet their needs in accordance with Post Office brand and the principles of Fairer Easier Better. You will provide an excellent service, and ensure that you adopt a 'continuous improvement' mindset. To do this you'll need to use commercial awareness, such as understanding competitors, trends and the value your business area contributes to the Post Office/Royal Mail Group and the impact across different areas of the business. You will represent your customer's needs ensuring that you understand and meet these.

Knowing your Customers

- Understand the link between their objectives and the overall business strategy.
- Works independently or leads a small team within a specific area of responsibility.
- Plans up to 6 months into the future.

Commerciality

- You look for opportunities to improve your service to customers, especially where this generates value for the business.
- You try hard to ensure you deliver value to customers and commercial benefit across the Post Office.
- You maintain effective working relationships with suppliers.

Championing the Customer

- You have regular contact with your customers and actively seek their feedback to ensure you understand their expectations and concerns taking action to address these.
- You accurately represent their views at meeting where they are not present.

Staying ahead of the game

- You pursue new opportunities related to your work and encourage others to try out new ideas, methods and technologies

1 Lanark PO. Customer Services where receiving high volume of call re POCA enquiries after the closure of office. After a customer was passed to the Police regarding being over charged for a recorded delivery, I considered that time could be better utilised if they were made aware of the situation. Therefore I contacted Line Management and advised on relevant questions to be asked prior to forwarding on to Police and other departments.

2 Lanark PO. Liaised with POCA Account Manager regarding customers and amounts stolen, giving regular updates by phone to ensure business was kept up to date on progress.

3 Earlston PO. Took on case from colleague. Advised Procurator Fiscal on analysis of Horizon information. Unfortunately she deemed insufficient evidence for theft. Discussed a charge of 'Uttering' as Postmaster had repaid £3,000. This was considered and accepted. Awaiting outcome of plea from defence.

<p>I TAKE ACTION</p> <p>High Level Description: Taking action means being clear about what you need to achieve, delivering with energy and enthusiasm and having a 'can do' approach. It includes responding in a timely fashion to changing requirements demonstrating flexibility and willingness to adapt to new circumstances and challenging and overcoming barriers to achieving goals. It means creating & taking opportunities that deliver business improvement, supporting and implementing agreed decisions taking into account risks and consequences, as well as benefits.</p>	<p>Clarity of purpose</p> <ul style="list-style-type: none"> You understand the link between your objective and business success and develop plans to deliver these. You make considered decisions consulting where necessary and demonstrating an awareness of how your decisions impacts upon others. <p>Energy & Enthusiasm</p> <ul style="list-style-type: none"> You demonstrate a willingness to accept change. You effectively manage resources and drive issues through to closure. You follow things through and display a sense of pride in achieving results. <p>Recognising opportunities/risks</p> <ul style="list-style-type: none"> You work out new and innovative ways of doing things better to save time, cost and make best use of resources. You implement decisions that may be unpopular and manage any impact. <p>Overcoming barriers</p> <ul style="list-style-type: none"> You identify barriers to achieving results and seek support in overcoming these where you are unable to find a way round these yourself.
<p>1 Glenvarloch Crescent POCA case. I considered the communication breakdown regarding Lanark and created an email and sent it to POCA Account Team, Press Office, Contracts Manager, Customer Services and Post Office Security Personnel, detailing the case, possible disruption to services and customer complaints re POCA' s. It also explained who should be communicated regarding external enquiries. This ensured information was passed to the correct sections.</p>	
<p>2 Lanark PO. Liaised with Lanark CID on POCA case. Assisted With search at PO, advising Police on relevance of evidence collected. Advised on Post Office procedures during breaks in Suspect Interview. Advised on content of letter Police were sending out to customers regarding theft from their accounts.</p>	

3 Earlston PO. Tasked by Procurator Fiscal to obtain further evidence and information within tight timescales. Obtained and analysed Horizon information within timescale.

I OWN PERFORMANCE

High Level Description: Owning performance means taking responsibility for your performance and where relevant, that of your team. It includes delivering your objectives to time, on budget and to the required quality as well as reviewing progress with stakeholders and managing their concerns when goals are not met as planned. It means setting high standards for yourself and others, continually seeking, giving and acting on feedback. It includes owning your development and helping to develop your team (if you have one), so that you and they, can perform to the highest standard. It also includes addressing short falls in your performance and managing under performance where required.

Setting Standards

- You take pride in making sure your (and your team' s) objectives will be delivered and that your performance meets the standard expected

Continuous Development

- You respond positively to feedback and take action to address development needs to continuously improve your performance.
- You develop your skills and knowledge by accepting diverse assignments and opportunities to work on projects.

Performance Management

- You recognise poor performance and take appropriate action to address this using appropriate policies and procedures.
- Where appropriate you provide timely feedback, and encourage and support individuals in identifying and undertaking development opportunities.

Ownership (taking responsibility, managing stakeholders)

- You take responsibility for completion of objectives and for failure to meet expected targets.
- You ensure your stakeholders are informed of the reasons why and corrective action you are taking.

1 Having been involved in a Police Liaison case at Lanark I realised the lines of communication were fragmented. I contacted our Senior Security Programme Manager and POCA Service Delivery Manager to discuss how to manage communications prior to a further POCA case. I formatted an email and this was delivered to all relevant sections informing them of their role and who relevant internal and external enquiries should be dealt with or forwarded to.

2 Cases transferred. For the same cases I have had untangled existing documentation then assess what was required to submit a comprehensive case to the PF.

3 Cases transferred. I considered after progression to PF I had advised them although colleague was main witness I would be the point of contact. This prevented case failures which would result in waste of prosecution costs and jeopardising any potential recoveries.

4 Offender/PF report. I considered time was being wasted creating an offender report and a PF report for Scottish cases. I created a report that incorporated both. The report was written in the PF format with the preamble at the top and included the relevant information for POL to make a decision. All POL information was highlighted in red and in a different font. Once it was decided for prosecution the preamble and information highlighted in red was deleted, leaving the report read for submission to the PF. Now when a case is authorised for prosecution it can be submitted to the PF within an hour, instead of time being spent writing a further report.

<p>I WORK WITH OTHERS TO WIN</p> <p>High Level description: Working with others to win means collaborating with others to deliver. It involves proactively sharing information & expertise that will help others achieve, sharing responsibility for collective actions and being clear on what is expected for each individual. It means looking beyond the achievement of just your own goals to how you can help deliver bigger successes for the business. It includes challenging ideas and plans to improve outcomes for everyone involved.</p>	<p>Collaborative working</p> <ul style="list-style-type: none"> You demonstrate a willing to help others to achieve. You try always to ensure that in achieving your goals that other people aren't left in a worse position and you always take into account their needs. <p>Sharing knowledge/Networking</p> <ul style="list-style-type: none"> You seek and share knowledge, experience and ideas with your team and cascade all relevant information, changes & developments in a timely manner. You will also share best practice and you are actively building a wider business network to learn what has worked elsewhere. <p>Considering wider impact</p> <ul style="list-style-type: none"> You ensure that your team and those around you are aware of what you are doing and your thinking. You inform and consult other business units and teams on major decisions and changes which may affect them <p>Learning from outcomes</p> <ul style="list-style-type: none"> You make an effort to understand why something worked well so that you can apply this knowledge in future. You willingly help people to resolve their problems.
<p>1 Attended SRA Training Event to keep myself up to date with changes to the website.</p>	
<p>2 SRA Website. I have ensured the North Team are kept up to date with the website and the progress of the new SRA Website through team meetings.</p>	
<p>3 MacPhail Drive PO. Attended meeting with Botterills. Discussed Horizon information that Subpostmasters (Multiple) could obtain. Considered the limited alarm access that some offices received from private companies and suggested if limited access could be built in to Credence for Subpostmasters to obtain Horizon information for their offices.</p>	
<p>4 The Inch PO. Lothian & Borders Police have operation where suspect is using The Inch PO to purchase Mobile Top Ups. Provided statement in processes and product and the E Top Up system POL uses.</p>	

<p>I ENGAGE AND INVOLVE</p> <p>High level description: To engage and involve people in the business and motivate them to perform to their best requires you to communicate in a way which generates understanding, belief and excitement around business goals. It means setting realistic challenges, showing appreciation and valuing individual contributions. It requires you to involve people at the right time in the decision making process so that you win their support and commitment. It is underpinned by trust and belief in others and relies upon you demonstrating the right behaviours, genuine consultation and active listening.</p>	<p>Inspiring</p> <ul style="list-style-type: none"> You create clarity around what is expected from you and (if appropriate) your team. You ensure you (and they) are aware of Post Office objectives and can see the role they play and the impact they can make, so that they feel energised and confident to deliver. <p>Encouraging</p> <ul style="list-style-type: none"> You listen to others and show respect for views and perspectives that differ from yours. You try to get to know those people around you so that this helps to build better relationships. You always try to ensure that you recognise your people and their achievements <p>Communicating</p> <ul style="list-style-type: none"> You communicate clearly and concisely both verbally and in writing meeting the different needs of all customers and colleagues. <p>Listening</p> <ul style="list-style-type: none"> You will listen to what people tell you openly and try not to prejudge them You show appreciation of their input even where you decide not to use their ideas.
<p>1 Received thanks from Line Manager for dealing with colleagues cases and getting everything back on track in Scotland since Sustaining Momentum</p>	
<p>2 Contacted Alex McKenzie, Field Support, Line Manager Mandy Neeson praising him for the standard of Audit Report for Tobermory PO. Suggested it be put forward as template for future reports.</p>	
<p>3 Contacted Jan Ferguson, Field Support, Line Manager Wendy Mahoney to thank Jan for the information received for Ballygrant. The information she produced has allowed us to make a decision on whether to attend. Attendance would cost the business approx £300 with overnight stays on Island due to Ferry times.</p>	

<p>4 Westwood PO. Transferred to Police due to Offender not cooperating. Gave statement outlining POCA product and processes to advance case.</p>	
<p>I CHALLENGE TO MAKE THINGS BETTER High-level description: Challenging to make things better means contributing positively to continuously improving business efficiency and effectiveness. Your challenges will be positive and supportive and focussed on activity rather than an individual. You won't describe problems without offering a solution but you will challenge the accepted approach for doing things and look for innovative and creative ways forward to ensure the best possible solution is identified. You'll encourage others to challenge your approach and activities so that challenging constructively becomes the accepted approach for improving the way we do things.</p>	<p>Positive Challenge</p> <ul style="list-style-type: none"> You will appropriately challenge ideas, suggestions and work processes where you strongly disagree with them <p>Solution Orientated</p> <ul style="list-style-type: none"> You will address issues as they arise and generally where you raise an issue, you'll also have a potential solution in hand <p>Committed to feedback</p> <ul style="list-style-type: none"> You are welcoming of feedback when it is offered. and do your best to ensure that you act upon this feedback to improve services to customers. You demonstrate willingness to consider other ideas and approaches and implement these where they deliver improvement to the way you do things. <p>Value add process improvement</p> <ul style="list-style-type: none"> You know what your key processes are and break these down into activities to identify opportunities for genuine improvement rather than acting on assumptions. Your focus is on fixing processes to ensure they deliver as planned.
<p>1 I challenged the Crown Office and Procurator Fiscal Service (COPFS) when SRA Certificates expired. New certificates would not download on POL computers. Informed cases were backing up to be reported and urgent action was required. New certificates issued problem found to be POL end. IT challenged to find solution.</p>	
<p>2 I challenged Julian Tubbs on decision to submit Glasgow CIT case to prosecution. I had contacted PF for advice and was informed as money was repaid and he was a first offender the likelihood was it would be marked for no proceedings. Julian decided it was policy to proceed to prosecution.</p>	

3 I challenged the reporting process in Scotland. Two reports had to be submitted on for POL Security and one for PF taking up valuable time. I compiled a merged report for both and submitted it to Line Management and the North Team for comment. Feedback was positive and the report accepted as standard.

8. Personal Concerns or Issues (workloads & priorities, problems, risks and successes, performance issues, own morale, domestic issues if relevant, annual leave and accumulated hours)

- Own Morale – Robert’s sister in law recently passed away and his wife is grieving. He is providing lots of support.
- Risks – Old and tired tape recorders.
- Successes –
- Annual Leave – As per Excel spreadsheet Days outstanding-11 days
- Accumulated Hours – 9hrs-toil
- Other – Last 2 yrs have been a rollercoaster wrt the constant change in team leaders, although the previous team leaders were very good.
- Request for information –

9. Summarise action points and items for discussion at next 121

Date	Action	Timescale	Owner	Update	Complete
	New Priorities/Action Points: to be met by the next 121 meeting,				

Addendum:
Feedback Cases on Hand & Action Points.

Robert Daily Cases on Hand	
Stane	Update: Warrant issued for arrest, awaiting execution of the warrant.
Corlic Street	Update: Still awaiting business deposits from Giro Bank. Case is been prioritised.
Port Glasgow	Update: Case to be closed. Full recovery made. Case NF'd. PF of the opinion that suspect will not reoffend and has a gambling defence.
High Street	Update: Case to be closed. Full recovery made. PF has lost case papers. Where are copies, is it worth resurrecting, considering the value?
Kessington	Update: Case deserted by PF on grounds that essential witness still in Pakistan. Court would have refused further adjournment. Look at tracing essential witness asap.
Wansbeck Estate	Update: Police liaison case. Informed that the witness suffers from GRO Awaiting court adjournment date.
St Catherine's	Update: AP to call the PF and establish when the matter will be pursued.
Westwood	Update: AP to email policemen for follow up.
Skye Crescent	Update: Trial due 14 December 2009.
Mcphail Drive	Update: Police liaison case. AP to obtain an update.
Jesmond	Update: Trial set for 14 December 2009.
Ottoferry SPSO	Update: Case to be closed. Accused was found guilty and received community service.
Earston SPSO	Update: To proceed with an uttering charge. PF to meet with me. AP to set up meeting with PF.
Kinlochewe	Update: AP to call PF for an update.
Piable	Update: Trial set 15 December 2009.
Tobermory	Update: Submitted to PF. AP to contact PF and establish progress.
Glenwarloch Crescent	Update: Admission made. PF to test this case in the courts. AP liaise with PF.
Bellville Street	Update: PF to look at charging Danny Naga. Loss to be recovered by Civil Litigation Agent Debt Team. AP follow up with PF on progress of case.
Cragengs Road	Update: Have received a solicitor's letter indicating that she wants to repay the debt. AP to establish what has been received by the Civil Litigation Agent Debt Team, prior to submitting to PF.
Glasgow CIT	Update: Submitted to PF. AP to follow up with PF with respect to progress.
Dalmeigh SPSO	Update: To interview the subject next week.