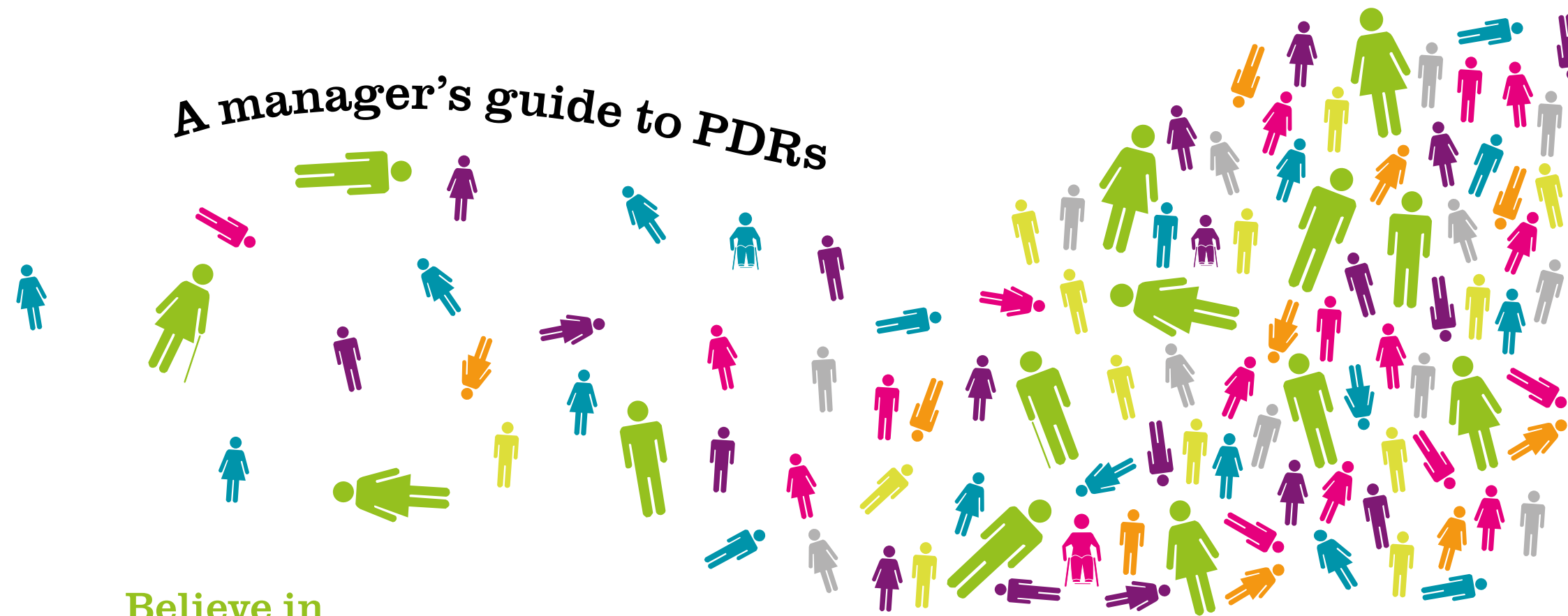


# Performing at our best

*A manager's guide to PDRs*



Believe in  
children



Barnardo's



# Using the guide

This guide will help you lead and manage your own performance and others in Barnardo's.

The guide is divided into segments to make it easy for you to access the parts most helpful to you. There is information on the skills you need to lead your people and handy tips and tools.

Navigate your way through the guide using the directional triangles or click on the buttons opposite.



# Introduction

Our purpose is to transform the lives of the most vulnerable children. Our ability to do this is built on the commitment, contribution and performance of all our people.

## What is Performing at our best?

Performing at our best describes how we want our managers to lead their teams and support people to give their best performance.

By working together and performing at our best we will achieve our ambition of better outcomes for most children.

## Our aim is that all employees will receive:

- Regular work reviews and feedback so that they know what is expected of them, what they are doing well and where they need to improve.

- A Performance and Development Review (PDR) that sets SMART objectives to help them concentrate on achieving our business plans.
- A review of 'how' they perform not just 'what' they do. For managers and leaders this is done using our leadership and management behaviours (LMB's). For others the focus is on our values.
- A development plan that helps focus on the skills, knowledge and behaviours needed to do their job well.
- The time and opportunity to grow, learn and share learning with colleagues as part of The 3 Day Learning Commitment.

Brought together this helps everyone know what to do and how to do it to and ensures Barnardo's is

**performing at our best!**





# Leading performance throughout the year

Motivating your staff and encouraging people to perform at their best is not about annual form filling. Leading performance is about motivating and inspiring the individuals in your team to achieve what is required and to 'go the extra mile'. Motivation can be different from one person to another. Getting to know your team, what motivates each individual and support them to perform at their best.

An employee's motivation is a direct result of the sum of interactions with his or her manager.

*Bob Nelson*

## What can I do?

**Give regular feedback**  
people want to know how they are doing.

**Regular team meetings and briefings**  
keep people updated and communicate what is going on.

**Praise and recognition**  
a simple thank you is often the most simple and effective way to let people know they've done a great job.

**Have regular work reviews**  
1:1s or supervision – it doesn't matter what you call it, put time aside for your people.

**Coaching and development**  
to learn, help them find the time and ways that work best for them as part of The 3 Day Learning Commitment.

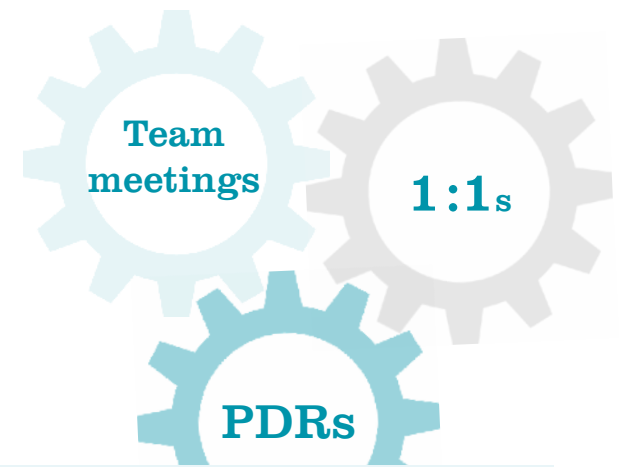
**Values and behaviours**  
demonstrate and role model our values and LMB's in the way you lead your team.

# What are my responsibilities as a line manager?






















# Tools for managing your team








## Team meetings

-  update the team on what is happening across Barnardo's
-  explain the impact on the team
-  catch up and share what the team is doing
-  encourage collaboration
-  maintain team focus or re-prioritise
-  share learning and good practice
-  gauge commitment, motivation and morale.
-  encourage a culture of respect
-  role model the LMBs

## 1:1s










-  catch up on day to day work issues and priorities
-  provide advice, guidance and coaching
-  review case work or work plans and progress on PDR objectives
-  ensure workload is manageable
-  give feedback and support
-  encourage reflection and learning.
-  plan for future learning activities.
-  ask how they are feeling; check their emotional health, well-being and resilience

## Performance and Development Review (annual and mid-year)

-  review objectives and significant projects
-  give feedback on how our values and LMB's are demonstrated
-  discuss strengths, areas for development and career goals
-  explain business plans and use them to set SMART objectives that stretch and motivate
-  identify longer term development opportunities.
-  discuss time spent in learning activities and plan learning for the coming six months.

# Encourage your team!

Encourage your team to use their strengths and manage their own performance and development throughout the year. You can encourage them to participate fully by asking them to:

-  Prepare for 1:1s and supervision
-  Generate solutions to challenges
-  Ask for feedback on their performance regularly with colleagues and 'customers'
-  Input into their own and the team's objective setting and work plans
-  Keep you informed on progress towards objectives
-  Manage their own learning through regular continuing professional development (CPD) and reflective practice
-  Preparing fully for their PDR and thinking about their work and career goals.
-  Take responsibility for their learning and find creative ways to learn
-  Record and reflect on their learning

# Giving regular feedback

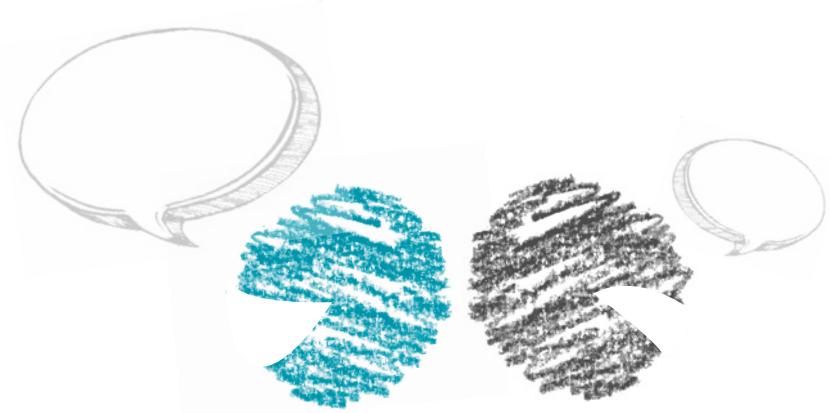
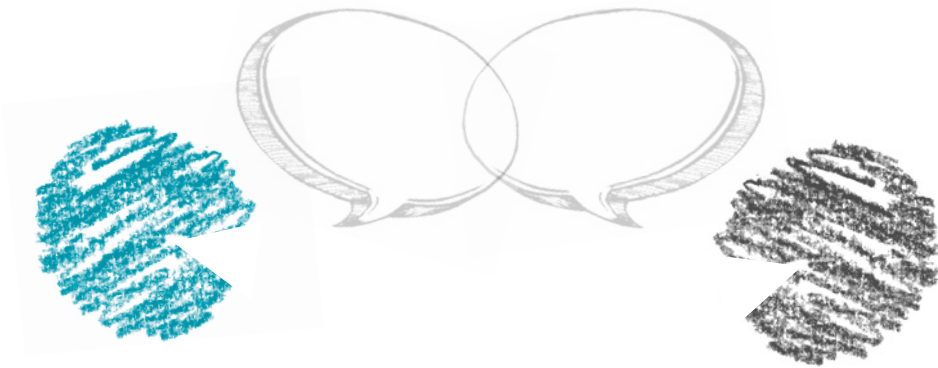
The process of giving feedback is an essential part of being a leader and is crucial to enable people to learn and perform at their best.

To do this people need to:

- understand what is expected of them – both ‘what’ and ‘how’
- know when they are doing well
- understand clearly what they need to change to improve
- Reflect on their learning and plan for more.

Many factors make us want to avoid giving feedback. Think about the times you may have avoided giving feedback and whether it has been a useful way to deal with issues:

- ignoring trouble – just hoping a situation will resolve itself
- lack of time – using day to day business priorities to avoid a difficult conversation
- easier to just do it myself – thinking you can rescue the situation instead of dealing with the root cause
- taking employees for granted – always expecting your top performers to do their best without support and encouragement.





# The B.E.E.R model for difficult feedback

Giving feedback that is honest, timely and actionable can often resolve performance issues and nip problems in the bud.

**Use this simple tool to help you give better feedback.**

**B** – Behaviour: explain what the employee is doing or not doing

**E** – Effect: describe the effect of the behaviour

**E** – Expectation: explain what the outcome could look like and what you expect the employee to do or not do to change.

**R** – Result: Identify what will happen if the employee changes (positive tone) or what will be the consequences if the behaviour continues (negative tone).

Believe it or not, the more you give feedback about uncomfortable issues, the less uncomfortable the sessions become. Tough issues do not have to mean tough feedback.

**Take a proactive, not a reactive approach.**

## Poor version

**B:** You never get the data to me on time I need for my reports

**E:** It makes me angry because it looks bad on me.

**E:** Get it to me on time in future.

**R:** It will help the department's image.

## B.E.E.R version

**B:** Your data for the reports was late for the last three months.




**E:** When your data is late I can't complete the reports, it delays the figures for the whole team and prevents planning for the next month.

**E:** In future I expect you to send the report by noon on Monday. If there are difficulties getting the data you need to let me know by Friday at 3pm.

**R:** If I get the information on time the figures for the whole team can be completed and we can start our monthly planning earlier.

# Collecting feedback

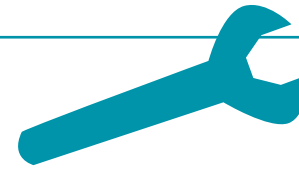
**Performing at our best** means working collaboratively with others to achieve results. Encourage your team to **collect feedback** throughout the year to support their development.

-  Encourage your team to have 1:1 reviews with people they work with
-  Encourage team members to share emails or letters that give feedback on their performance
-  Role model how to ask for feedback by asking your own team!

You are encouraged as part of your PDR preparation to get feedback from key people in your team. This is best done in a 1:1 or supervision **before the PDR.**

**Agree with your team member:**

- who will ask for the feedback
- who to ask
- what questions to ask
- if you will discuss the feedback before the PDR.



## Toolkit

### Example feedback questions

**Questions you might ask about your team member's performance:**

- how effectively do they work with you and your team?
- what do you see as their strengths?
- in what ways could they improve working with you?
- what did they contribute to your project/workgroup?
- how effectively do they communicate and share information with you?
- how well they demonstrate Barnardo's values + LMB's?
- how could they be more effective?
- how do they share their learning?

**Questions you might ask your team about your own performance:**

- do I set clear and realistic work tasks and deadlines?
- how could I improve the support and feedback I give you?
- how would you describe my management style?
- in what ways could we improve the ways we work together?
- how effectively do I communicate and share information with you?
- how does my practice reflect Barnardo's values and LMB's?
- how do I support your learning?

# Coaching

Coaching is an invaluable leadership skill and enables people to take ownership and develop their own solutions. **YOU CAN** learn and implement this skill whenever the situation is suitable, such as during an PDR, one to ones or career development conversations.

## Help, I don't have time to coach! Really?

Coaching improves the performance and motivation of your team members in a sustainable way that is more effective than a directive management style. It encourages team members to take responsibility, develop solutions and be accountable for what they need to achieve and how they need to behave.

It takes practice to start with for both you and your team member, but by strengthening your team's confidence and capabilities you will enable them to work smarter – and create more capacity for your **own accountabilities and personal development**.

## WOULDN'T YOU LIKE MORE TIME TO DO THAT?



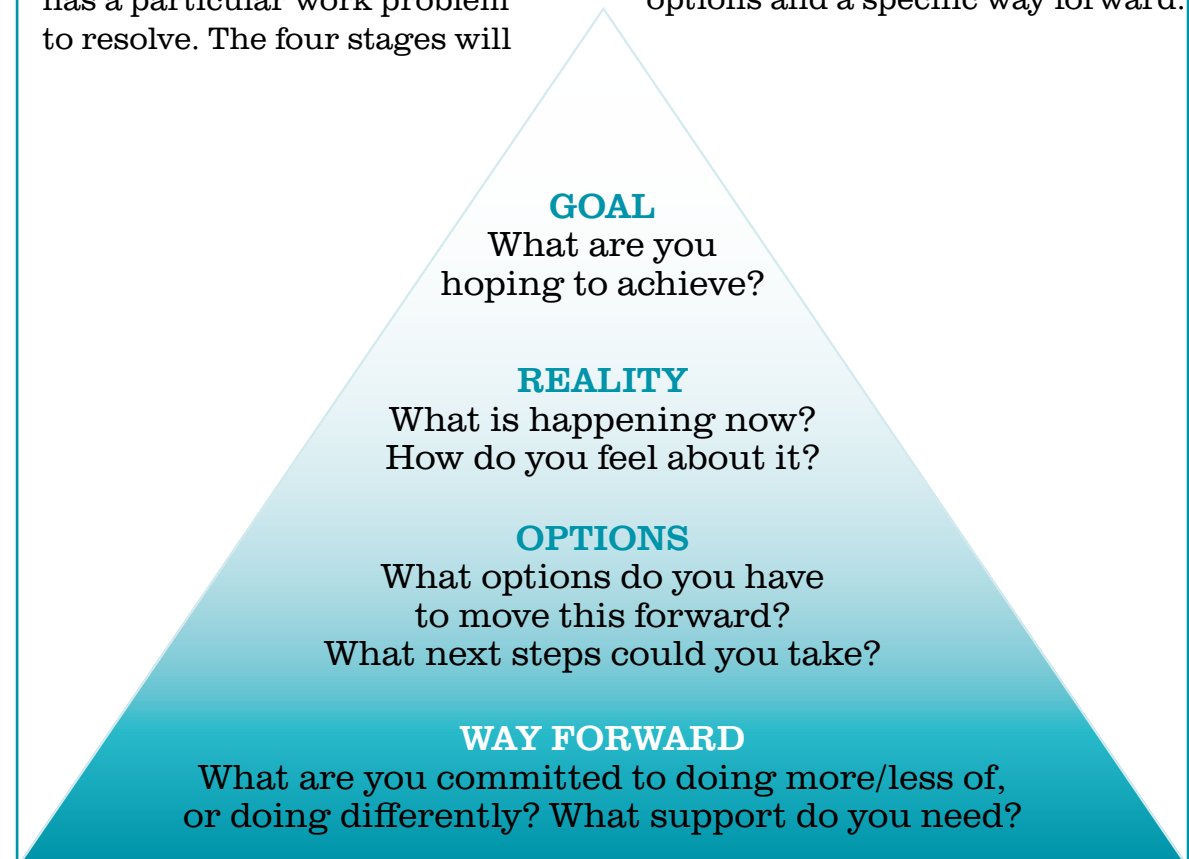
## Coaching toolkit

(frameworks to help you structure an effective coaching conversation)

### The GROW model

**GROW** is an effective approach to use with an individual who has a particular work problem to resolve. The four stages will

focus the individual's attention on identifying the real problem, options and a specific way forward.



# OSKAR

(Coaching toolkit, continued)

Scaling is a useful way of assessing where the individual is now, and where they want or need to be. Use a scale of 0 – 10 where 10 represents the ideal outcome. The current situation is rarely zero and small changes can make a positive difference.

The outcome is the difference the individual wants to see or achieve.

This stage is about finding out what is working already. The focus is always positive; what works or what has worked rather than what won't work or what is wrong.

There are two steps here, positively affirming the individual's strengths to build their self belief, and helping them decide the steps to take to move forward. Often this is doing more of what is working already rather than anything new or different.

The final stage is reviewing progress at the next coaching session. Ask what is better rather than whether a particular action was carried out. Focus on things that are moving the individual in the right direction. Return to the scale to find out how much things have improved and what has helped the most.

OUTCOME	SCALING	KNOW HOW AND RESOURCES	AFFIRM AND ACTION	REVIEW
<p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>■ What do you want to achieve (long, medium, and short term) ?</li> <li>■ What is the perfect scenario?</li> <li>■ What differences will you see, hear, feel if you acheive this?</li> </ul>	<p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>■ On a scale of 0 to 10, with 0 representing the worst it has ever been and 10 the preferred outcome, where would you put the situation/behaviour today?</li> <li>■ You are at "N" now; what did you do to get this far?</li> <li>■ How would you know you had got to N+1? or N+2?</li> </ul>	<p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>■ What helps you perform at "N" on the scale, rather than 0?</li> <li>■ What knowledge, skills, attitudes do you currently have that are helping you?</li> <li>■ When does the outcome already happen for you – even a little bit? What did you do to make that happen?</li> </ul>	<p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>■ You said your knowledge of "X" is extensive and has enabled ....</li> <li>■ What did you do to get this far? How can you do more of that?</li> <li>■ Do you think altering the current procedure has any additional benefits?</li> </ul>	<p><b>Ask:</b></p> <ul style="list-style-type: none"> <li>■ What is better?</li> <li>■ What did you do that made change successful?</li> <li>■ What do you think will change next?</li> </ul>



# Recognition

**Recognition needs to be a regular and on-going process.**

It is important to recognise and celebrate your team's successes as and when they happen:

- 👤 focus on the contribution individuals are bringing
- 👤 consider what you know about your team and how they individually like to be recognised
- 👤 as with any feedback, make it specific and meaningful, **don't skip the good stuff!**

**How can I recognise and value my team and team members?**

- 👤 use team meetings to mention specific achievements
- 👤 relay compliments and thanks received about your team
- 👤 nominate someone for a 'CEO monthly award' or agree your own fun way of recognising one another in a team meeting
- 👤 encourage more senior managers to recognise and flag achievements
- 👤 say **Thank You!**

## The B.E.T. model for positive feedback

Use positive feedback to reinforce positive behaviour and performance. Use it so your team members are clear on 'why' they did a good job.

- B** – Behaviour: explain specifically what the employee is doing well
- E** – Effect: describe the effect of the behaviour
- T** – Thank you – never forget to say thank you for a job well done





# The PDR







# The PDR season

The Barnardo's PDR season runs from April to June but **performing at our best** means discussing and managing performance all year round with a mid-year review in October to December.

## What you must do.

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
		Book PDR meetings for the year	PDR season begins Ask your team to complete the PDR form Discuss obtaining feedback Hold the PDR meetings			Final MyPlace complete and logged on Oracle			Hold mid-year interim reviews 6 months from the PDR date		
									Log mid-year reviews on MyPlace		

### Good practice tips all year round:

-  Book regular 1:1s with your team giving feedback on performance. **Document your discussions.**
-  Think about PDR's for your team and what evidence you have for your feedback.
-  Encourage your team to seek regular feedback from colleagues and key contacts.
-  Review and revise objectives regularly to ensure they are relevant and going to plan.
-  Create the time for your team to learn and share learning
-  Ask your team to continuously document and reflect on their learning



The PDR season ties the objectives set in the PDR with our Corporate Strategy and local operational workplans. This is important to ensure everyone is working to achieve the organisations objectives and ensuring we are performing at our best.

# The PDR

The PDR has 3 main parts. Use these as the basis for structuring the discussion.

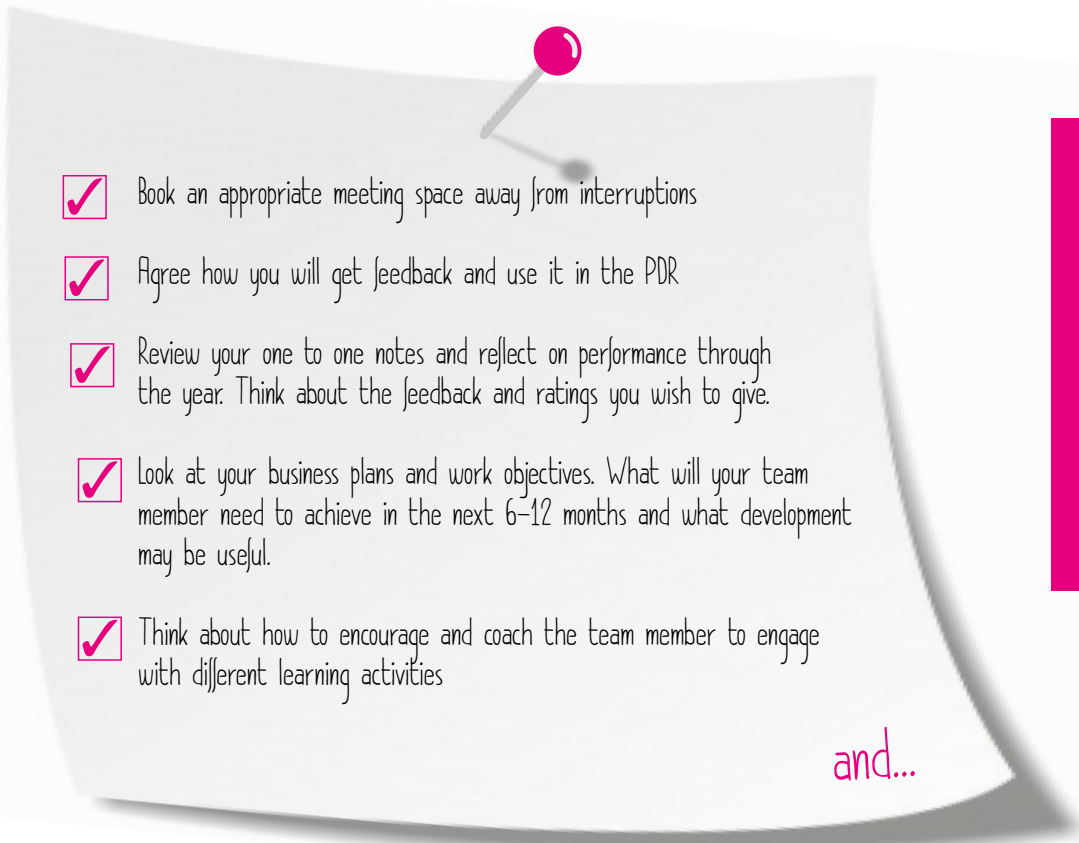
**Section 1 – Reflection and learning (annual and mid-year review)**

**Section 2 – Future Planning and Continuous Improvement (annual)**

**Section 3 – Supporting You (annual)**

## How should I prepare for the PDR?

**Good preparation is a vital part of the PDR.** Think of the PDR as a consolidation of all the 1:1s and informal time you have invested in your team members.

- 
- ✓ Book an appropriate meeting space away from interruptions
  - ✓ Agree how you will get feedback and use it in the PDR
  - ✓ Review your one to one notes and reflect on performance through the year. Think about the feedback and ratings you wish to give.
  - ✓ Look at your business plans and work objectives. What will your team member need to achieve in the next 6-12 months and what development may be useful.
  - ✓ Think about how to encourage and coach the team member to engage with different learning activities

and...

### ... don't forget to:

- ✓ check your team member understands the process and has access to the form and guidance
- ✓ ask them to complete the PDR form and return it to you **two weeks** ahead of the PDR meeting.



# Conversations that count!

The most important part of the PDR is the discussion – it isn't a form filling exercise!

Your time should be broadly split 40/60 between reviewing past performance and planning for the future. After all, you've been reviewing objectives and learning plans regularly in 1:1s so half the work is already done!

## Other top tips for successful PDR discussions:



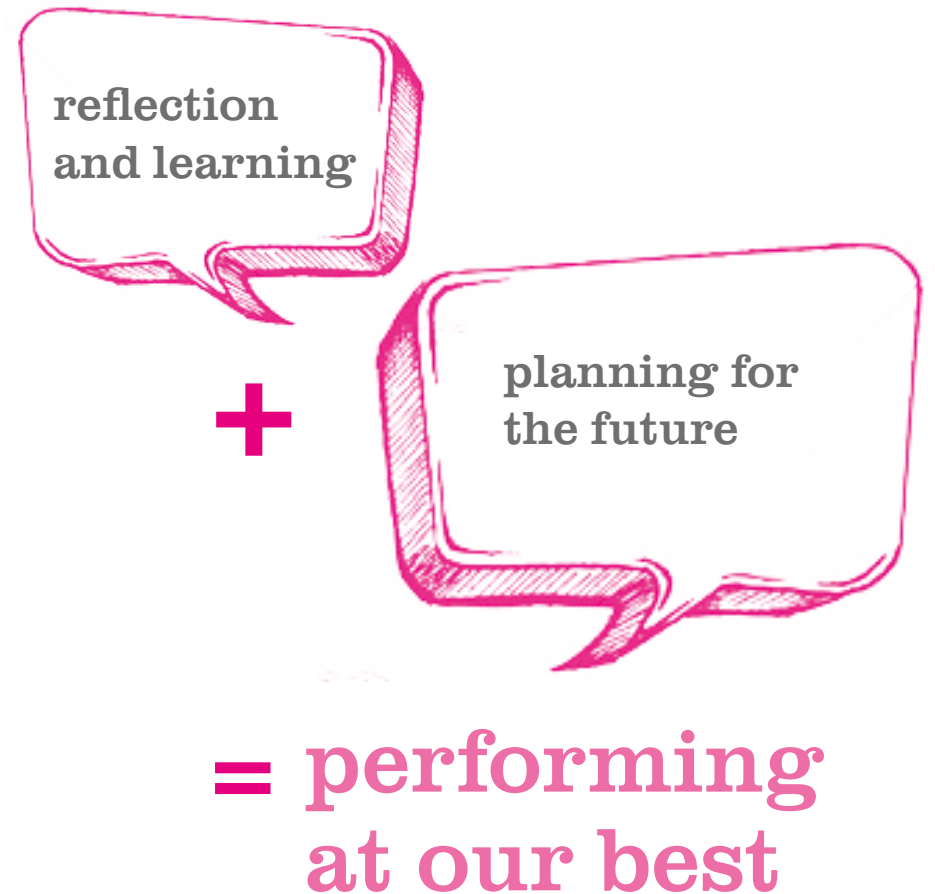
Give some positive feedback on both what they delivered and how they behaved – and don't rush it. Positive reinforcement is often the best way to maintain good performance.



Listen more than you talk. Encourage self-reflection and help your team member identify their own solutions.




Summarise what you have heard to check your understanding.





## Section 1 – Reflection and learning

Everyone across the organisation needs to take responsibility for their own development. We are all individuals with different strengths, talents and work goals. The purpose of the section 1 is to help your team member reflect on their performance and behaviours which encourages continuous improvement and learning.



**I can help  
you do this**

**Discuss the employees comments and use the questions on the form to structure the conversation.**


- Discuss the objectives, impact and learning.
- Discuss how effectively our values or LMBs are demonstrated.
- Review the learning and development and how the learning was used.
- Log how much time was spent in learning over the past 6 months
- Discuss career goals and progression and what learning would support the progress.
- Discuss things that didn't go to plan. What was learned?
- Agree to a clear plan that gives the time to learn and removes barriers to learning.



how?



maybe



**I can  
do this!**



when?



I don't  
know

# Barnardo's Leadership and Management Behaviours

Focussing on objectives is only part of the story when planning forward and looking back at performance – the 'how' you do something is as important as 'what' you do.

Give examples of:



- Our **Leadership and Management Behaviours Framework** describes these three behaviours and how they help you to be your best. Invest the time to familiarise yourself with them to support effective conversations with your leaders, your managers and with your own line manager
- At each of the three levels – Manager, Assistant Director, CLG – you will find statements describing effective and ineffective behaviour. The statements aren't exhaustive but they do capture the key behaviours to demonstrate at that level
- Each behavioural statement builds across the three levels to reflect the changing requirements and increased demands of the role
- As you progress through your leadership career you will continue to demonstrate and build on the behaviours from the previous level
- We know everyone has a bad day now and then so displaying an ineffective behaviour infrequently will not have an impact on the overall assessment of your performance

# Behaviours

During the Performance Development Review you will discuss and rate how effectively behaviours are demonstrated. If you are not used to discussing behaviours, the same principles apply that you use for talking about objectives:

- Be objective and specific; give examples of effective or ineffective behaviours
- Consider what evidence or feedback you have on outcomes of their behaviours; share and discuss to understand impact on performance
- Ask the individual how they decided on the rating for the behaviour; invite self-appraisal for discussion

## Ways to self-appraise behaviours

**1** Use your coaching skills to check their self-perception – see the **OSKAR** coaching framework (pg: 14)

**2** Ask your team member to describe where they are on a scale of 1-10 against a specific behaviour. This will inform more robust development conversations, encouraging progress to close any gaps.

If 10 is consistently demonstrating this effective behaviour, where are you most of the time?

1 ←————→ 10

**3** Ask what steps they could take to move the effectiveness of that behaviour up one scale.

Discuss which behaviours are most critical and/or beneficial to agree in their learning & development plan for the next year. These could be to work on:

- increasing the effectiveness of certain behaviours
- developing new ones
- building on potential for future leadership roles, at the next level

## DEVELOPING BEHAVIOURS

When agreeing a learning & development plan, remember that behaviours are best developed and deepened not in a classroom setting but by learning with others or in role at work. Explore ideas on Inside.Barnardo's at [Leadership & Management Behaviours Framework](#).

Please note – if your team members are not in a leadership or management role discuss how they demonstrate Barnardo's Values and their impact on 'how' performance is achieved.



# Performance Ratings

During the PDR you will give you two ratings based on the appraisal period

- Performance and objectives
- Values or Leadership and Management Behaviours.

The purpose of the rating is to give clear feedback on your view of current performance so your team member knows what they are doing well and where they could develop. We know our people do amazing work across the charity. The expectation is that most will receive a rating of 'Effective' (see Ratings scale).

## Giving a rating

In your preparation for the meeting consider the following:

- Think about the rating you will give and your reasons. Remember feedback is most helpful where it is specific and constructive.
- Think about overall performance and context. Was it a particularly challenging year or did objectives and priorities change?
- Consider the reaction you may get and how you will respond. You may find it useful to get some coaching or support from your line manager or people team.
- Ask your team member to reflect on their contribution and give their own rating in the meeting. Listen carefully.

## Fairness and consistency

- Think of the ratings for your whole team. Question if you are being consistent and fair.
- Discuss your ratings with your line manager before the meeting to explore if you are being fair and consistent.

## Bias

We all have biases, some positive and some negative; it is part of being human. A lot of the time we don't even know we are being biased and this is called 'unconscious bias'. Unconscious bias can positively and negatively affect the ratings we give our team members. To avoid this try:

- Examining your biases and assumptions before the meeting.
- Seeking feedback on your team member from a wide range of people and being open to the feedback without dismissing opposing views.
- Making sure you give each team members review equal preparation, time and focus.
- Asking for feedback from your team member on the rating you have chosen and if they think it is fair.

# Ratings scale

We see performance as a mix of what you do and how you do it. We give equal emphasis to achieving performance objectives and demonstrating our Values or Leadership and Management Behaviours.

*“The rating of “Effective” is a positive endorsement of your contribution. A higher rating is given when fully justified from the evidence relative to role expectations, and that required for a highly effective/exceptional performance.*

Performance ratings	Improvement Required	Effective	Highly Effective	Exceptional
<b>What you do</b> <b>Performance and Objectives</b>	<ul style="list-style-type: none"> <li>Does not achieve what is required</li> <li>Fails to meet expectations of the role</li> </ul>	<ul style="list-style-type: none"> <li>Good and reliable performance</li> <li>Meets role expectations</li> <li>Achieves most objectives</li> </ul>	<ul style="list-style-type: none"> <li>Very good performance</li> <li>Consistently achieves role expectations and often exceeds them</li> <li>Consistently delivers key objectives</li> </ul>	<ul style="list-style-type: none"> <li>Outstanding performance</li> <li>Consistently exceeds role expectations, often by a significant margin</li> <li>Over-delivers on agreed objectives</li> </ul>
<b>How you do it</b> <b>Our Values or Leadership and Management Behaviours</b>	<ul style="list-style-type: none"> <li>Fails to regularly demonstrate positive behaviours</li> <li>May have a negative impact on others</li> </ul>	<ul style="list-style-type: none"> <li>Regularly demonstrates positive behaviours</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates positive behaviours at all times</li> </ul>	<ul style="list-style-type: none"> <li>Demonstrates behaviours at the highest level at all times</li> <li>Is a consistently impressive role model and encourages others to do the same</li> </ul>
<b>Suggested learning</b>	<ul style="list-style-type: none"> <li>A performance improvement plan will support you to focus on your gaps to achieve in your current role</li> <li>Consider your current gaps and what learning would help you improve</li> </ul>	<ul style="list-style-type: none"> <li>Identify key areas to focus on to progress further in your current role</li> <li>Focus on fully and consistently achieving your objectives and behaviours</li> </ul>	<ul style="list-style-type: none"> <li>Identify your strengths and how you can use these more</li> <li>Focus on excelling in your role and consider your next career aspiration</li> </ul>	<ul style="list-style-type: none"> <li>Consider your future career aspirations and what learning would support your growth</li> <li>You are seen as a role model and could consider mentoring or coaching others to develop them</li> </ul>

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# Section 2 – Future planning and continuous improvement

Each area of the charity will use the Corporate Strategy to set their workplan or objectives for the year ahead – what needs to be done, how and achieved in the next 12 months.

Use the workplan most relevant to your part of the charity and use it to discuss objectives for your team.

Ask for ideas and help individuals draft objectives based on these priorities and accountabilities.

Work with your team members so they understand how their role fits into this bigger picture.

Help them see how achieving their individual objectives helps Barnardo’s achieve its overall ambition and ensures we are **Performing at our best.**

### Equality, Diversity and Inclusion

All employees should have a least one objective.



# EDI Objectives

Here are some examples to get you thinking about how you can help us reach our diversity and inclusion ambitions

- Encourage my team to use the Wellness Action Plans. Use team meetings to discuss mental health and 121's to check my team are ok.
- Research how to make all external communications inclusive.
- Present examples of our work with diverse communities to commissioners.
- Give my staff time to be active in EDI staff networks and attend meetings.

Promote our Equality, Diversity and Inclusion Strategy to everyone who works at or with Barnardo's

Treat everyone we support fairly and equally

- Add EDI to our team meeting agendas each month to share learning and identify ways we can better support diverse families.
- Rewrite training materials used with young people to include a broader range of diverse images, text and issues.
- Research the changing nature of gender identity in young people and share findings with my team.
- Ask our service users for feedback on the service we provide and how well it meets their needs.

- Create a shop window display of Asian fashion and advertise for volunteers in our shop window.
- Learn about unconscious bias. Ask a broad mix of young people to support me on recruitment panels.
- Ensure that reasonable adjustments required by disabled staff and volunteers to be effective in their role are provided quickly.

Build a diverse and representative workforce

Make the services we offer as accessible and inclusive as possible

- Contact a local language and translation service to help us reach out to the Eastern European Community.
- Check new shop premises for accessibility for disabled persons before agreeing to new leases.
- Create a learning plan to develop your cultural competence.

# What are SMART objectives?

We've all heard the word before, but making objectives SMART can take practice.

Here's a recap:

S  
M  
A  
R  
T

**SPECIFIC** – enough to be meaningful

**MEASURABLE** – so it's clear when they have been met

**ACHIEVABLE** – so they motivate and stretch the individual

**REALISTIC** – and relevant to individual's role and abilities

**TIME BOUND** – so that it's clear what has to be done by when.

## TOP TIPS

### SMART objectives

Review objectives throughout the year and change them as you go.

Ask for regular updates on progress and set interim milestones.

Make sure the objectives provide some professional challenge and if possible match the individual's career goals and areas of interest.

Don't set objectives that are just business as usual.

Encourage ideas and participation in setting objectives but make sure they are relevant to the workplan.

Consider what support and resources might be needed to help achieve the objectives.

Remember 'how' we do things is important, set expectations on the LMB's or Values needed to achieve the best results.

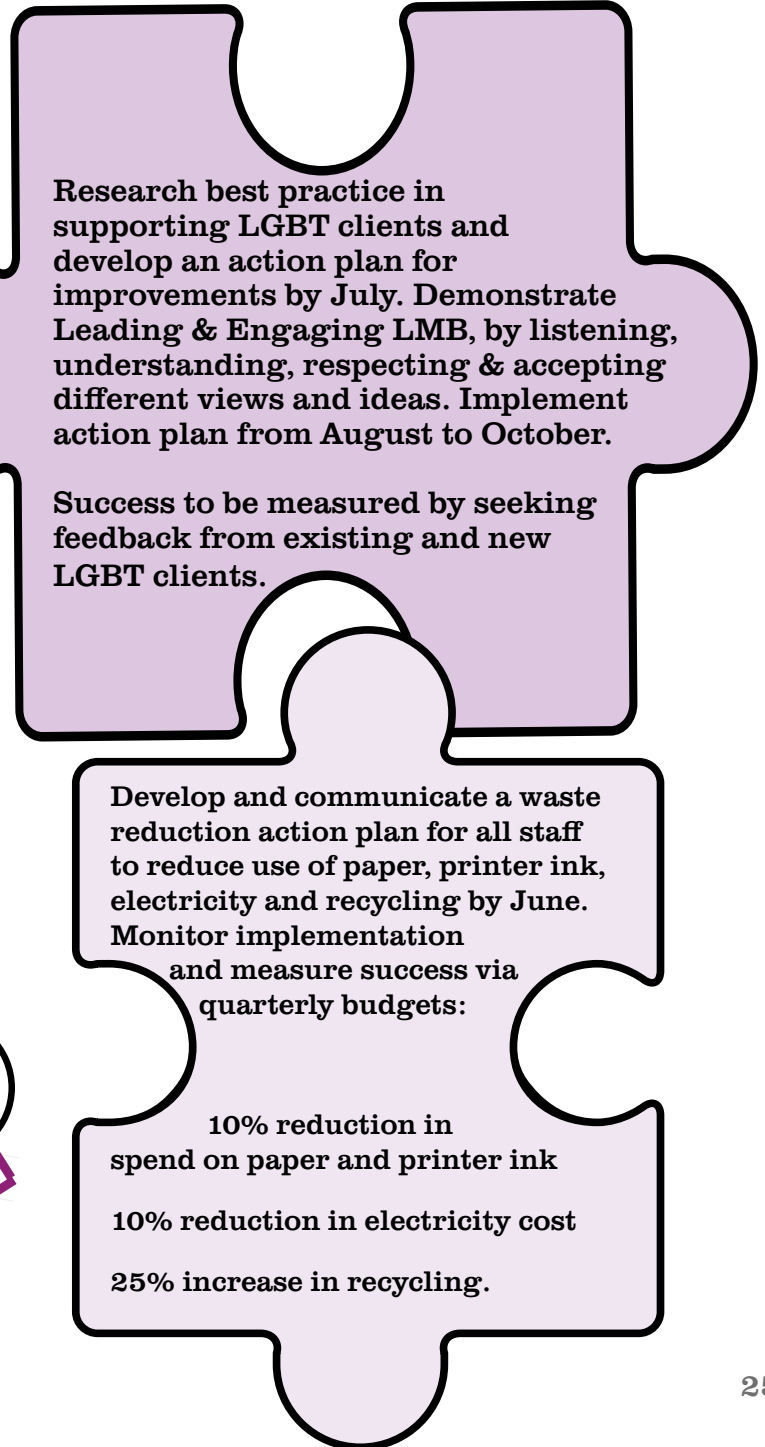
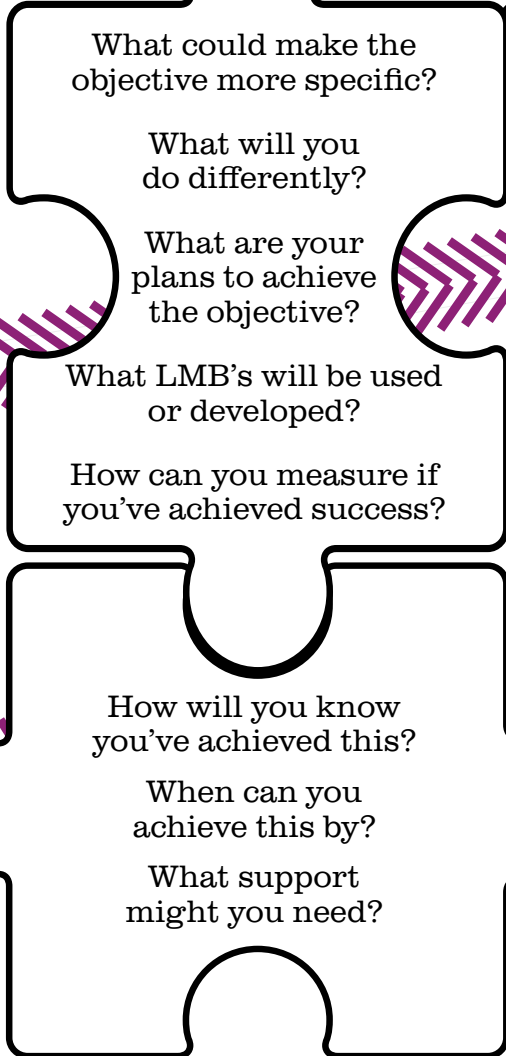


# Let's look at some examples:

## Improved objectives

### Questions to ask

### Proposed objectives



Provide better support to young LGBT clients

Save money on stationary and office costs.

What could make the objective more specific?

What will you do differently?

What are your plans to achieve the objective?

What LMB's will be used or developed?

How can you measure if you've achieved success?

How will you know you've achieved this?

When can you achieve this by?

What support might you need?

Research best practice in supporting LGBT clients and develop an action plan for improvements by July. Demonstrate **Leading & Engaging LMB**, by listening, understanding, respecting & accepting different views and ideas. Implement action plan from August to October.

Success to be measured by seeking feedback from existing and new LGBT clients.

Develop and communicate a waste reduction action plan for all staff to reduce use of paper, printer ink, electricity and recycling by June. Monitor implementation and measure success via quarterly budgets:

- 10% reduction in spend on paper and printer ink
- 10% reduction in electricity cost
- 25% increase in recycling.










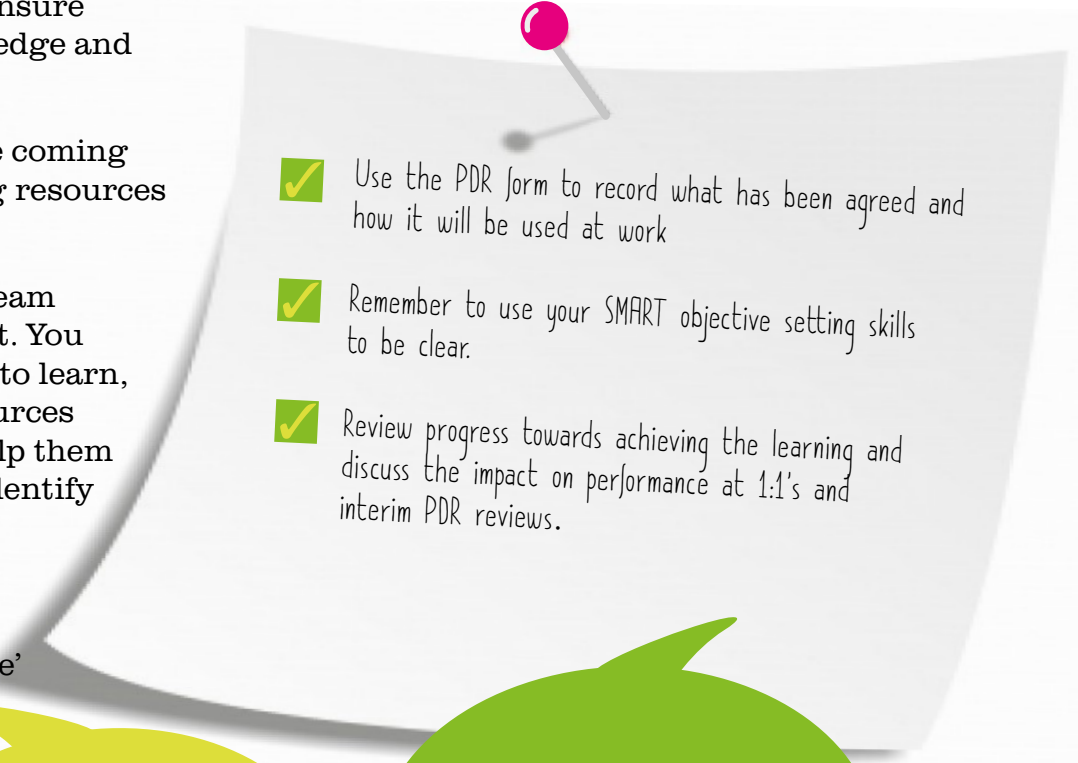
# Learning and development plans

To **perform at our best** we need to continually learn and grow. Agreeing a learning plan is a key part of the PDR and will ensure individuals are supported to develop the right skills, knowledge and behaviours needed for the role.

To support your learning conversation and planning for the coming year, discuss how your team member is using the b-learning resources through The BU.

You will be a key source of support and guidance but your team member is responsible for managing their own development. You can support this by helping find the time and creative ways to learn, b-learning offers a wide range of learning courses and resources. Discuss what learning would support their learning and help them achieve their objectives. Encourage your team member to identify learning methods that give the best value and most impact:

-  work shadowing or job coaching
-  online learning, web groups or 'communities of practice'
-  networking
-  trying new responsibilities or activities
-  coaching and mentoring
-  reflective practice and clinical supervision
-  visits to shops, service or departments (see The 3 Day Learning Commitment on page 27 for more ideas)

- 
- ✓ Use the PDR form to record what has been agreed and how it will be used at work
  - ✓ Remember to use your SMART objective setting skills to be clear.
  - ✓ Review progress towards achieving the learning and discuss the impact on performance at 1:1's and interim PDR reviews.

**Remember, training courses can be helpful but are rarely the best way to learn for most of us.**

**Learning plans are as important as SMART objectives.**



# The 3 Day Learning Commitment

As part of our plan to become a **learning organisation**, Barnardo's has made a commitment to all staff and volunteers that they should have at least 3 or more days of learning per year. (This can be proportional to the days/hours you work/volunteer).






## Why?

“**Learning is key to getting better**” Emma, young person in Barnardo's Participation project.

It is important we give team members permission, time and the opportunity to embed learning activities into their work. Continuous learning makes a big impact, it keeps us sharp and relevant

## How?

Use your team member's PDR to reflect on:

-  The learning they have already done
-  What impact their learning made to their work
-  How they shared this learning with others (colleagues, team, organisation)
-  How much time they invested in learning activities
-  Agree a learning plan for the next year to develop their learning through different activities.

## What? Here are some ideas of great learning activities



Organisational Key Performance Indicator – 90% of staff will have 3 or more days of learning per year. This is measured by inputting your team member's MyPlace record in Performance and Development.

# What if someone is underperforming?

If you've had regular 1:1's and reviews during the year, it's unlikely the PDR will be the first time you are discussing underperformance. Nevertheless, dealing with underperformance is one of the most difficult things you may do as a manager and it can be difficult for both sides.

## Dealing with underperformance:

It is rare anyone in Barnardo's wants to give less than their best. Follow these key tips to handle underperformance:

- Deal with it as soon as it becomes apparent – don't wait for the PDR.
- Use the **BEER** model to give effective early feedback
- Discuss performance in 1:1s and ask why it is occurring, explain the impact and give appropriate support. **Record your discussions.**
- Be clear on expectations and what needs to be achieved going forward. Set review dates and stick to them.
- Your local people team are there to support you if you need guidance on how to handle underperformance even if formal action is not needed.

What if performance doesn't improve within an agreed timescale or informal methods have not worked?

Discuss with your local people team and line manager whether a more formal approach to the performance issue is needed.

Read the [Performance Improvement Policy](#).



## Supporting you: Equality, diversity and inclusion

We have built equality, diversity (EDI) and inclusion in to the PDR as part of our ambition to be a more diverse employer. It puts into practice our value of respecting the unique worth of every person.

The PDR is a chance to review if there are any actions we need to take to make adjustments to the workplace to ensure staff with specific diversity identities are not disadvantaged and are able to work free from discrimination. It is also a great opportunity to promote best EDI practice in all we do and for those we support.



### What does diversity identity mean?

We are all unique and valuable individuals. But certain groups of people are more likely to experience a disadvantage. The Equality Act gives protection to the following 'protected characteristics' which we have named diversity identities:

**disability**

**race**

**sexual orientation**

**religion and belief**

**age**

**sex**

**pregnancy and maternity**







**gender reassignment**

**= Equality, diversity and inclusion**

# What are workplace adjustments?

Workplace adjustments are changes to working arrangements that are needed on the basis of someone's diversity identity.

Examples include:


-  flexible working arrangements for disabled staff or staff with childcare/eldercare responsibilities or those supporting disabled relatives
-  a workstation adjustment for a disabled worker
-  request to present (dress) as the opposite gender as part of gender reassignment.
-  a break to pray at specific times
-  regular breaks to manage the impact of a mental health problem.
-  attending a network to boost confidence and gain support.

If a team member makes a request for a workplace adjustment you need to review it in a timely way. Requests must be reasonable and balanced with the operational need for the work to be done. Ask for advice from your local people team as saying no could be a form of discrimination.

## Zero Tolerance

We want to create a workplace where everyone feels valued and can express their identity without experiencing discrimination or harassment. This could be from colleagues within Barnardo's, or third parties we work with. If your team member reports any unwanted conduct on the grounds of their diversity identity, listen carefully to their experience and discuss how the situation will be handled. Agree an action plan and ensure you follow up any actions you have agreed. Seek advice from your local people team and record the actions you have taken.

There are different levels of inappropriate behaviour, but it all has a negative impact. Zero tolerance means stamping out all inappropriate behaviour that relates to or impacts upon someone diversity identify. Look out for:

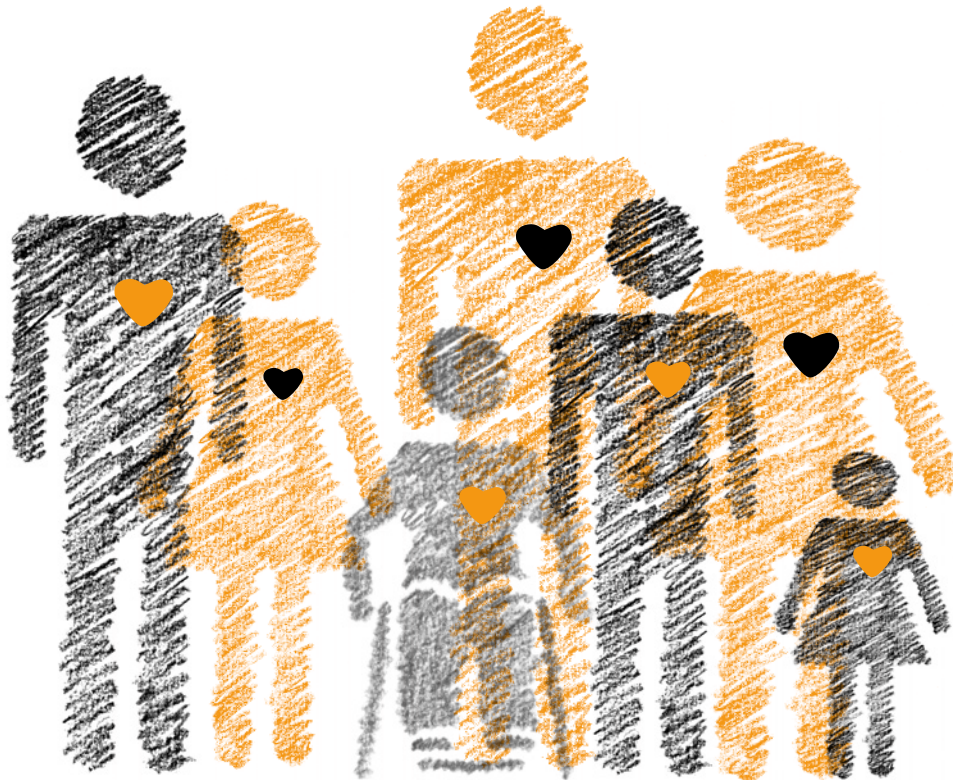


- unpleasant**
- personal remarks**
- bad language**
- exclusion**
- gossip**
- unwanted nicknames**

## Equality, diversity and inclusion is for everybody

# Respecting the unique worth of every person

EDI is at the heart of our basis and values. The EDI Code of Conduct for Staff and Volunteers sets out the commitments and personal responsibility we all have to live our values and promote equality, diversity and inclusion in everything we do.



**Here are some ways you could learn more about diversity and demonstrate your commitment:**

- ♥ Seek out resources and/or training that increase quality of service you provide to service users with diversity needs e.g. learn about the impact of an LGBT identity on family life/mental wellbeing.
- ♥ Attend networking events with local diverse community groups.
- ♥ Become an EDI lead within your department and share your learning and knowledge with your team.
- ♥ Attend the Corporate EDI Learning and development session if it has been 3 years or more since you attended.
- ♥ Use reflective practice in supervision to consider how you have supported service users from specific groups and assess knowledge gaps or development needs.
- ♥ Commit to challenge discriminatory attitudes and behaviours in an appropriate way.
- ♥ Support a team member to attend and be active in a local network.

# Monitoring and quality

We have a target that 90% of eligible employees will receive an PDR. This target is a simple measure that checks PDR's are being done.

But...the quality of the conversation is what matters. When your PDR forms are complete, send them to your line manager for review and optional comments. This is a key part of checking the quality of the PDR. You should expect your line manager to discuss them with you in your 1:1, provide feedback and give appropriate professional challenge based on their experience of your team member or your discussions about them.

If you are a reviewing manager, here are some key things you should consider in reviewing the PDR:

- ▶ have objectives been reviewed?
- ▶ are the ratings consistent with your knowledge of what and how the objectives have been achieved?
- ▶ is there evidence that continuous learning has occurred and made improvement in work performance?
- ▶ has feedback from other sources been included?
- ▶ has learning been recorded and time spent learning measured in days/hours (proportional to working hours)
- ▶ is there evidence the team member demonstrates our values and/or LMBs and is this consistent with your knowledge?
- ▶ have SMART objectives been set that match operational workplans?
- ▶ is there a relevant learning plan in place?
- ▶ has the EDI section been used by the team member and is the manager's response appropriate?

## Disagree?

**As a manager's manager, what options do I have if I disagree with the Manager's PDR for their team member?**

- Discuss the PDR with the manager and check your understanding.
- If not satisfied that the PDR is an accurate reflection of achievement you may ask your manager to have the conversation again and review the form with their team member.
- Give feedback and coaching to the manager on their style and approach to PDR's.
- Check actions have been followed up in 1:1s.



# Need support and advice?

## Where else can I get support and advice?

Local people teams run workshops on the PDR process. These are a great chance to increase your skills and check you are making the most of the PDR's with your team members.

There are also a range of **e-learning packages** about specific skills for PDR and line management:

- appraisal interviewing
- setting objectives
- making objectives happen
- performance trouble shooting
- assertive manager
- a useful guide to goal setting

Your **local people team** is a valuable source of advice and support. Your **line manager** will also support you or you may have a trusted colleague to ask for peer support.

# Did you know?

You can use our EAP helpline and website for advice and information on how to manage your team? There is a dedicated manager support service to help you with tricky people and team issues.

Check out [healthassuredeap.co.uk](http://healthassuredeap.co.uk) and look at the manager pages or call **0800 030 5182**

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