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**Performance and Development Review**

**Frequently Asked Questions**

**(for colleagues within D, E & F grades)**

These frequently asked questions provide answers to some common questions relating to the Performance and Development Review (PDR) policy for colleagues within **D, E and F grades** and is intended to assist both colleagues and line managers with the process. Please contact your People Team for further guidance.

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1. **Why do we have a Performance and Development Review (PDR) process? Why is it important?**

At Barnardo’s we are committed to delivering excellence for the children, young people and families who we support. We all have a part to play in helping Barnardo’s realise its purpose in achieving better outcomes for more children and this starts with our [Strategy](https://inside.barnardos.org.uk/our-strategy) .

The [PDR process](https://inside.barnardos.org.uk/people-and-culture/performance/performance-development-review-pdr-2023) is an important time where colleagues receive recognition and appreciation for their achievements made over the previous review period in addition to feedback on their progress and how they can develop their knowledge and skills in the future. The process should encourage ongoing learning and celebrate success.

In addition to the annual PDR meeting where typically between 3 and 5 objectives (goals) are set for the year, line managers and their colleagues meet halfway through the year to carry out a mid-year review to reflect on and discuss progress against objectives (goals) so far and to look ahead to the next six months.

1. **What does the PDR process look like for the remainder of 2023?**

Colleagues within pay grades, D, E and F should follow this [PDR process](https://inside.barnardos.org.uk/people-and-culture/performance/performance-development-review-pdr-2023) until 31 March 2024, and have a mid-year review as usual, in the autumn (from October – December 2023). In line with our new approach to pay progression, colleagues within grades D-F will be introduced to [a new framework for developing and progressing](https://inside.barnardos.org.uk/delivering-excellence-performance-and-development-policy-0) in April 2024. However, to ensure fairness, for this year only (from June 2024), these colleagues may have their pay automatically progressed\*, unless they are not eligible - for example, due to a ‘live’ formal warning/sanction. \*Subject to affordability.
2. **When are mid-year reviews carried out?**

These will take place from October to the end of December 2023.

1. **What does the mid-year review cover?**

As a guide, the mid-year review will typically last about an hour and is a two-way process following on from previous supervisions/one to one meetings that have taken place since the annual PDR. The meeting should focus on wellbeing and any concerns and check on any agreed reasonable or workplace adjustments. There should be a check in on whether progress made against objectives (goals) is on track or if a colleague needs additional support to help achieve these. Colleagues should show how they have acted on feedback that has been received and applied any learning they have undertaken, where possible.

The mid-year review is also a time to consider if objectives (goals) need to be amended or reset if organisational priorities have shifted, ensuring they are SMART (**see Q8**) and aligned with business plans and our [Strategy.](https://inside.barnardos.org.uk/our-strategy)

1. **How do I prepare for the mid-year review?**

Colleagues are encouraged to take advantage of the option to complete the Wellness Web located within the mid-year review form to help facilitate discussion regarding their wellbeing.

Colleagues should reflect on what they have achieved and learnt since their last PDR in readiness for completing their sections (1 & 2) of the mid-year review form, in advance of the mid-year review taking place. Colleagues should also take a longer-term view and look ahead to future performance and development objectives (goals) and what support may be needed to achieve these.

Line managers should ensure that colleagues have access to the [mid-year review form and PDR Policy](https://inside.barnardos.org.uk/people-and-culture/performance/performance-development-review-pdr-2023), and plan and agree a specific time for the form to be competed and the mid-year review to take place. The mid-year review meeting should take account of agreed working arrangements, however, it is encouraged to conduct the mid-year and end-of-year PDR meetings in person, where possible.

In preparation, colleagues and managers should plan for the meeting, for example by reviewing past one-to-one meetings/supervisions, the previous PDR, and considering if future objectives (goals) remain relevant. If priorities have changed since the last review period, the objectives (goals) can be amended, and new ones agreed.

1. **Why do we have a 3-day learning commitment?**

We continue to encourage all colleagues to engage with Barnardo’s [Three-day learning commitment](https://inside.barnardos.org.uk/bu/personal-development/three-day-learning-commitment) and to set aside 3 days as a minimum over the year (pro rata for colleagues who work less than full time) to focus on their learning and to revisit their learning and development needs with their manager.

It is important that colleagues have the time to develop their learning and the opportunity to embed learning activities into their work. Although, we will not want learning to stop if colleagues achieve their 3 days, all colleagues should continue to explore ways to integrate learning into their everyday work.

1. **How do I find out more about learning opportunities?**

Our [b-Learning platform](https://inside.barnardos.org.uk/bu/learning-all/b-learning) provides learning resources and information, which is regularly updated. Do use this to promote conversations about your learning and development needs.

**8.** **What are SMART objectives (goals)?**

Objectives (goals) should be SMART, future focussed and promote learning.  

**For example:**

**Original objective:**

Provide better support to LGBTQ+ young people using our services.

**To make this SMART, think about:**

* What would make this objective more specific?
* What needs to be done differently?
* What plan do you have to achieve this objective?
* How can you measure success?

**SMART Objective:**

Research best practice in supporting LGBTQ+ young people and develop an action plan for improvement by end of December. Implement action plan from 1 February and review at the end of March.

Success to be measured by seeking feedback from existing and new LGBTQ+ young people using our services.

**9. Is there anything else to consider when developing and agreeing**
 **objectives (goals)?**

Objectives (goals) should not be ‘business as usual tasks’, but specific targets that
provide some challenge and development linked to the charity’s requirements
and, where possible, match the colleague’s career goals and areas of interest. At least one objective should have a focus on equality, diversity and inclusion (EDI) in line with our EDI [Action Plan 2022 – 2023](https://www.barnardos.org.uk/equality-diversity-inclusion/action-plan).

‘How’ we do things is equally important, so objectives (goals) should set expectations based on [our behaviours](https://inside.barnardos.org.uk/our-behaviours) .

Objectives (goals) should be discussed regularly as part of regular supervision/one to one discussion to support further progress.

**10.** **As a manager, how do I record a completed mid-year review?**

Once completed and signed, a copy of the completed mid-review form should be emailed directly to your colleague and added to their Electronic Staff File (ESF) and also logged as complete on Dynamics 365, by following the steps below:

* Go to ‘employee self-service' tile on the home page in Dynamics 365 and click on the ‘My team’ tab.


* Scroll down to your team member(s), click on the tile of the colleague you are recording the review for, and click on ‘Details’.



* A drop-down list will appear; select ‘Certificates’



* When the certificates page loads, click on ‘New’



* Select ‘MYR 23’ (Mid-Year Review 2023 Grades D-F) from the certificate type list and add the date the review was started and completed (these can be the same dates), then click on Save.





* The recorded mid-year review will now appear on the colleague’s certificates page.