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Performance and Development Review Process Frequently Asked Questions (for colleagues within Grades D, E and F)

This document aims to answer some frequent questions relating to the Performance and Development process for colleagues within **D, E and F grades** and is intended to assist both colleagues and line managers. Please contact your People Team should you need 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](#).

The [PDR process](#) is an important time where colleagues continue to review their objectives and celebrate achievements since the last PDR meeting and take a longer-term view and look ahead for performance objectives and learning and development goals. The process should encourage ongoing learning and celebrate achievements.

In addition to the PDR meeting where objectives (goals) are set for the following 12 months, line managers and colleagues will also meet halfway through the cycle to carry out a mid-year review to reflect and discuss progress against objectives (goals) and to look ahead to the next six months.

2. What does the PDR process look like for the remainder of this period (2023/24)?

Colleagues should follow the current [PDR process](#) with their end of year PDR meeting taking place between now and 31 May 2024. As we move to our new [Performance and Growth Cycle](#), colleagues should look ahead and agree and set objectives (**goals**) for the next 12 months by **30 June 2024**. The majority of colleagues will use Dynamics 365 to input their goals and colleagues in Retail and Trading using a new and improved offline process. All goals for the year ahead should be set to start no later than 1 July, please use the training available on b-learning, see [Performance and Growth Cycle: training and support](#), to support you inputting your goals.

3. When are the end of year reviews carried out?

These will take place from April to 31 May 2024.

4. What does the end of year review cover?

As a guide, the end of year review will typically last about an hour and is a two-way process following on from previous supervisions and colleague conversations that have taken place since the last PDR meeting. The meeting should focus on wellbeing and any concerns and check on any agreed reasonable or workplace adjustments. Discussions will focus on progress made against objectives (goals) and check if the colleague needs any additional support. Colleagues should show how they have acted on feedback that has been received and applied any learning they have undertaken, where possible. SMART objectives (goals) are set for the next 12 months and are aligned with business plans and our [Strategy](#).

5. How do I prepare for the end of year review?

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

Colleagues should reflect on what they have achieved and learnt since their last review in readiness for completing sections 1 & 2 of the review form prior to the planned PDR meeting. Colleagues should look ahead to future performance and development objectives (goals) and think if any support is needed to achieve these.

Line managers should ensure that colleagues have access to the [end of year PDR form](#), and plan and agree a time for the end of year review meeting to take place. The review meeting should take account of agreed working arrangements, however, it is encouraged to conduct the end-of-year PDR meetings in person, where possible.

In preparation, colleagues and managers should plan for the meeting, for example by reviewing past supervisions/colleague conversations and the previous PDR.

6. What about learning and development?

Think about your learning since your last review. What impact has your learning made to your role, your team, service etc, how have you shared this learning with others and how much time have you invested in learning activities. Do check that you are up to date with your [Mandatory training](#), some of which may need to be refreshed and think about future learning and development needs and any support that may be required for your future objectives (goals).

7. How do I find out more about learning opportunities?

Our [b-Learning platform](#) provides learning resources and information and is regularly updated. Do use this to promote conversations about your learning and development needs.

8. What about setting objectives (goals), what do I need to know?

Objective (goal) setting should be a collaborative process between colleagues and their line manager.

Objectives (goals) will need to be set every year with a link to the charity's Strategy and your local annual plans. Your focus should be on what you do and how you do it.

Colleagues should work to **three operational goals** aligned to the strategic delivery of their team or department plus **one developmental goal, and line managers** will have an **extra management goal**.

Objectives (goals) should give consideration and focus to equality, diversity and inclusion (EDI) in line with our [EDI Action Plan](#). How we do things is important, so objectives (goals) should set expectations based on [Our behaviours](#).

Objectives (goals) should continue to be SMART.

#

SMART objectives are:

SPECIFIC	Enough to be meaningful
MEASUREABLE	So it's clear when they have been met
ACHIEVABLE	So they can motivate and develop
REALISTIC	Be relevant to the individual's role and abilities
TIME BOUND	So that it's clear what has to be done and by when

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:

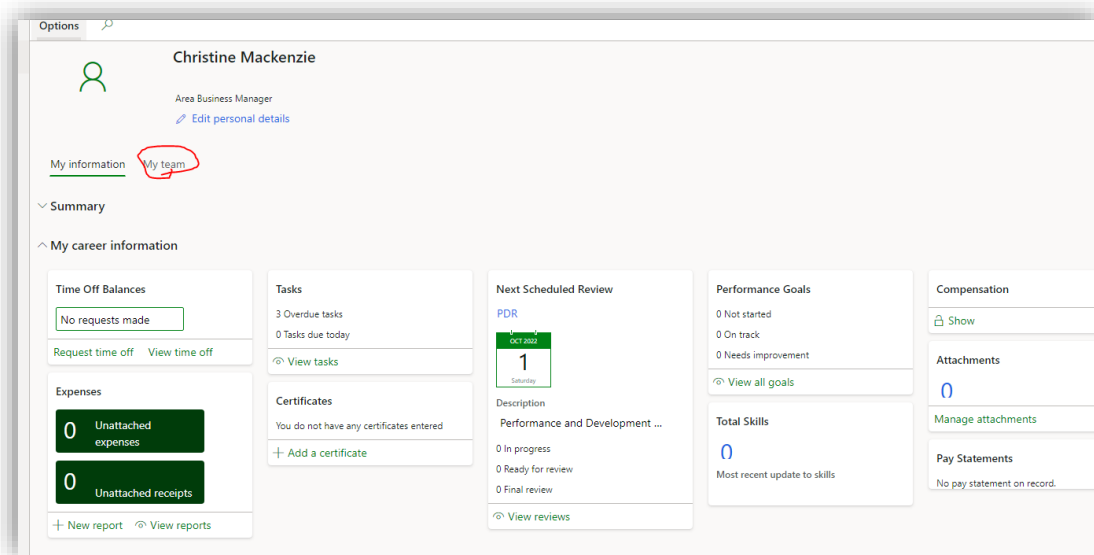
Research best practice in supporting LGBTQ+ young people and develop an action plan for improvement by end of December. Implement action plan from 1 February and review at the end of March.

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

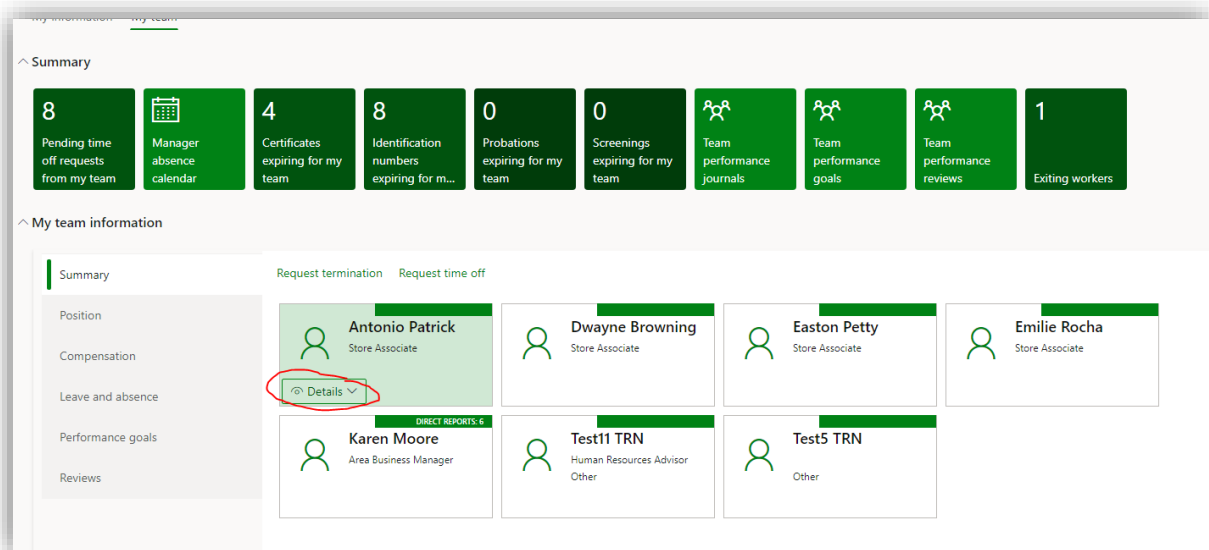
9. As a manager, how do I record a completed end of year review?

Once completed and signed, a copy of the form should be emailed directly to your colleague and added to their Electronic Staff File (ESF) then logged as complete on D365, by following the steps below:

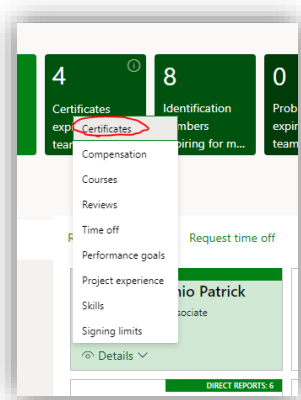
- Go to 'employee self-service' tile on the home page in Dynamics 365 and click on the 'My team' tab.



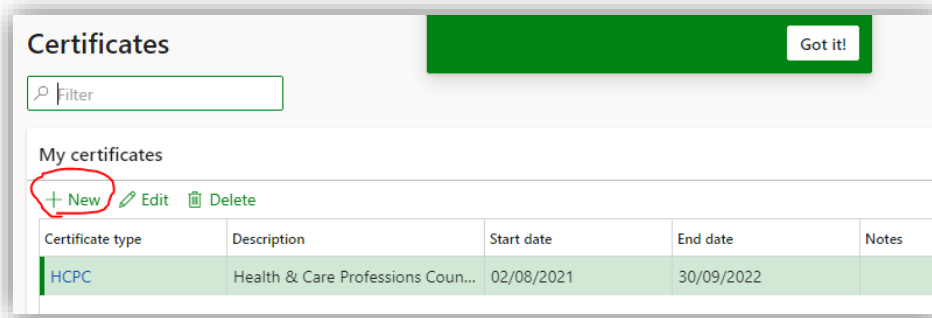
- Scroll down to your team member(s), click on the tile of the colleague you are recording the review for, and click on 'Details'



- A drop-down list will appear; select 'Certificates'



- When the certificates page loads, click on 'New'



- Select 'PDR 2024' 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 screenshot shows a form titled 'What is your certificate?'. The form has the following fields:

- 'Certificate type' dropdown menu with 'PDR 2024' selected.
- 'Description' text input field with 'PDR 2024' entered.
- 'Start date' date input field with a red border and a calendar icon.
- 'End date' date input field with a calendar icon.
- 'Notes' text input field.

- The recorded end of year review will now appear on the colleague's certificates page.