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Changing lives.

# Barnardo's Corporate Policy

## Performance and Development Review (PDR) Policy

<b>Risk Owner:</b>	Director of People and Culture
<b>Supported by:</b>	Employee Relations and Policy Manager
<b>Date Approved:</b>	1 October 2023
<b>Date for Review:</b>	31 May 2024
<b>Distribution</b>	Internal and external – not confidential

### 1. Purpose

Barnardo's purpose is to achieve better outcomes for more children, young people and families. Our ability to do this is built on the contribution of our colleagues. This policy is non-contractual, and Barnardo's reserves the right to amend this policy at any time.

This policy aims to ensure that:

- The quality of our work is promoted through the effective management of performance and continuous learning.
- Colleagues receive an annual and mid-year performance and development review (PDR), as part of regular performance discussions.
- Learning is planned, celebrated and opportunities made available through the 3-day learning commitment (see [Three-day learning commitment | Inside Barnardos](#)).
- Colleagues have SMART performance and learning objectives (goals) that support [Barnardo's Strategy](#) region/nation/department or local workplans.
- Colleagues and managers work in ways consistent with our Values and our [Behaviours](#)
- Equality, diversity and inclusion (EDI) is promoted through a mandatory objective (goal) in line with our [EDI Action Plan](#).
- Children's Services colleagues should build on the existing supervision format located in the [Children's Services Supervision Policy](#) to incorporate an additional focus on performance progress against objectives.

### 2. Policy

## **PDR Season**

The purpose of the PDR meeting is to reflect upon the past year's performance and learning and then to take a longer-term view and agree future objectives (goals) and development goals.

2023/24 will be a period of change and the **Performance and Development Cycle** will be changing its name to the **Performance and Growth Cycle**. This better reflects the aims of our Strategy and our ambition to make Barnardo's a place where you can grow and thrive.

- The Cycle will be a rolling 12-month cycle, with the **goal setting window open from now until 30 June 2024**, and goals should be set to start no later than 1 July for the following 12 months.
- Instead of seven steps, the Cycle has been simplified to four focus areas:
  - Goal Setting – Set your SMART goals for the next 12 months
  - Mid-year Review – Review your progress against your goals and look ahead to the next 6 months
  - Alignment (managers only) - An opportunity for managers to discuss ratings with other managers in the charity to make sure they are aligned
  - Performance & Growth Review (PGR) and Outcome - Replaces the end of year PDR, where you review your progress, evidence, and feedback gathered over the last 12 months.

### **What does the PDR process look like for the remainder of 2023/24?**

Colleagues who sit in Grades, D, E and F should continue to follow this PDR process until 31 May 2024. In line with our new approach to Performance and Growth, the [new Cycle](#) will be introduced during Spring 2024.

End of year PDR meetings should take place between colleagues and line managers by 31 May 2024. Achievements should be reviewed since the previous PDR meeting and future objectives (goals) should be set for the next 12 months.

## **3. Scope**

This policy applies to all colleagues directly employed by Barnardo's who are on pay grades D, E and F and who have successfully completed their probationary period. Please also refer to the "PDR Eligibility" provided later in the policy.

## **4. Definitions**

**Performance Development Review (PDR)** is an opportunity for colleagues to reflect on their contributions, achievements and learning and discuss these areas with their manager and to look ahead to future priorities and objectives (goals). However, the review of objectives (goals) and learning should be continuous throughout the year and discussions should take place within supervisions and one-to-one meetings.

### **Mid-Year Review (MYR)**

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.

## 5. Roles and Responsibilities

<b>Colleagues</b>	<p>Are responsible for:</p> <ul style="list-style-type: none"><li>• Actively contributing to the PDR and mid-year discussion.</li><li>• Achieving their performance and learning objectives (goals).</li><li>• Discussing the learning that they have done over the year/review period at the PDR and mid-year review meeting and to think about their future learning prior to the meeting.</li></ul>
<b>Line Managers</b>	<p>Are responsible for:</p> <ul style="list-style-type: none"><li>• Familiarising themselves with the Frequently Asked Questions (FAQs) that accompany this policy.</li><li>• Treating all colleagues fairly and consistently throughout the process.</li><li>• Listening to colleagues, promoting a two-way inclusive PDR and mid-year conversation and giving clear feedback.</li><li>• Agreeing SMART objectives (goals) with colleagues, please see <a href="#">FAQs</a> for further guidance</li><li>• Encouraging colleagues to learn and develop throughout the year and to fulfil the 3-day learning commitment.</li><li>• Ensuring our behaviours are appraised for all roles.</li><li>• Ensuring objectives (goals) are relevant to organisational plans and service delivery and that they are regularly reviewed.</li><li>• Saving the PDR and mid-year form to the colleague's electronic staff file.</li><li>• Logging completed PDRs on Dynamics 365, please refer to the <a href="#">FAQs</a> for further details.</li></ul> <p>• Are responsible for reviewing the quality of PDRs and giving feedback to line managers.</p>
<b>Line manager's manager</b>	<p>Are responsible for:</p> <ul style="list-style-type: none"><li>• Giving advice and guidance on the PDR policy and procedure.</li><li>• Making recommendations for PDRs for quality improvement.</li></ul>
<b>People Teams</b>	<ul style="list-style-type: none"><li>• Are responsible for reviewing and updating the PDR policy, form and Frequently Asked Questions in accordance with Barnardo's business needs.</li></ul>
<b>People Strategy &amp; Projects Team</b>	

## 6. Procedure

### **Process Stages: Annual PDR and Mid-Year Review**

The stages below broadly apply to the current PDR process and mid-year review. The PDR review provides an opportunity to reflect upon the past year's performance and take a longer-term view of future objectives (goals) and development, whilst the mid-year review provides an opportunity to review progress halfway through the year and to check if objectives (goals) are still relevant or whether priorities have changed, and objectives (goals) need to be reset.

### **Before the Meeting**

The line manager should:

- Ensure the colleague understands the process, has access to the FAQs and the PDR form and is aware of the need to complete and return the required sections prior to the planned review meeting.
- Agree any reasonable adjustments needed to support colleagues during the PDR process if possible.
- Consider any other specific needs such as any cultural and/or language barriers.

### **Colleague's Preparation**

Colleagues should complete sections 1 & 2 of the PDR form and the Wellbeing Web, if they wish, and return the information to their line manager prior to the planned review meeting.

### **PDR review meeting**

The conversations at the PDR meeting are significant parts of the process and provides an opportunity to reflect upon the past period of performance. The PDR takes a longer-term view of future objectives (goals) and development. The form is a tool to aid discussions and can be used as an agenda for the meeting. The meetings are a two-way process and the areas discussed include, but are not limited to:

#### Supporting you

- Talk about ratings from the Wellbeing Web, if completed.
- General "check in" discussion around wellbeing, with appropriate support offered where necessary.
- Discuss any work concerns work and explore options of how to address them.
- Provide an opportunity to discuss any equality, diversity and inclusion issues including requests or a review of reasonable adjustments or adaptations.
- A colleague may also raise any issues of discrimination based on their identity. Managers should discuss the colleague's concerns/experience with them and explore options to deal with the situation.

#### Reflection and Learning

- Review previous objectives (goals), focussing on what has been achieved (to date) and how it has been achieved in line with Barnardo's values and behaviours.
- Review of learning and development and 3-Day Learning Commitment.

#### Future Planning & Continuous Improvement

- Set SMART performance objectives (goals) with clear links to business plans or workplans. At least one objective must be linked to EDI. Line managers need to work towards an additional goal (objective) that is related to people management responsibility.

- Discuss what development and/or support might be needed to achieve these objectives (goals) and if are any reasonable adjustments required.
- Plan learning objectives (goals), including developing our behaviours and 3-Day Learning Commitment.

#### Feedback

- Feedback from the manager, line manager’s manager, other colleagues of stakeholders.
- Any additional comments by the line manager or colleague.

The discussion should be focussed on the colleague with appropriate direction and support from the line manager. If clear supervision or one-to-one notes exist where objectives (goals) have been regularly reviewed, only a brief summary or reference is needed on the objectives (goals) section.

The PDR form should be written up as soon as possible after the meeting has taken place and be sent to the colleague for signature. Line managers are encouraged to do this within two weeks of the meeting. Once the colleague has received the form, they are welcome to add any additional comments, in the section provided, and to sign and return the form to their line manager, recommended again within two weeks. Any disagreements should be recorded within the comments section.

The line manager should send a link of the form to their line manager for review and additional comments. The line manager’s manager should, as far as they are able, review the quality and consistency of the PDRs for their direct reports and raise any relevant issues with the line manager concerned e.g., where the objectives (goals) are not relevant to workplans. They may add comments and should notify the line manager when complete.

- Line managers save the forms to the colleague’s electronic staff file.
- Completed reviews are to be logged on Dynamics 365 (refer to FAQs for further details).

#### **PDR eligibility**

All colleagues with one year’s service or more on 1 April 2024 should receive a performance and development review during the PDR season.

#### Other timing anomalies:

Changed roles or new in post	The probationary or transition agreement will apply.
Line manager is new in post	The previous manager or line manager’s manager should be invited to give feedback if possible. Delay the PDR until later in the season. Objectives (goals) may still be set and discussed in one-to-ones prior to the PDR.
Colleagues with less than 1 year’s service on 1 April 2024 or within probationary period	Colleagues within their probationary period should have a probation or transition agreement to set performance objectives (goals). If the probationary period is complete but the colleague has less than 1 year’s service, performance objectives (goals) should be set in supervision or one-to-one meetings, but no PDR is required.

Maternity/Adoption/Fostering Leave/Shared Parental Leave	Hold the PDR prior to the period of leave or as soon as possible after the return, even where this is outside the PDR season. Use only the sections that are relevant.
Long term sickness	Hold the PDR as part of the return-to-work process as soon as is appropriate in the phased return to work even where this is outside of the PDR season. Use only the sections that are relevant.
Fixed term contracts and temporary posts	Use either the PDR or the probation and transition agreement to set objectives (goals) and review performance depending on the length of service and duration in the post.
Formal stages of the Performance Improvement Policy apply	Delay the PDR until later in the season until the matter is resolved. If the concerns are not resolved the PDR should take place and reference the performance improvement process. Setting future objectives (goals) may be postponed until the current ones have been achieved.
TUPE transfers	<p>People Teams will advise on any contractual requirement to complete appraisals outside the PDR season during the transfer process.</p> <p>Ordinarily a transferred colleague will be included in the PDR season.</p>
Qualified or registered posts	Colleagues in qualified or registered posts with regulatory appraisal or performance management processes, such as teachers, should use the process relevant to their profession.
Colleagues on secondment	Use either the PDR or the probation and transition agreement to set objectives (goals) and review performance depending on the length of service and duration in the post. Use the secondment agreement to agree which process will apply prior to the start of the secondment.

## 7. Associated Legislation, Guidance, References and Documents

Located on Inside.Barnardo's:

- PDR Form 2023, Mid-year Review Form 2023 and PDR FAQs can be accessed on [Inside Barnardo's policy page](#).
- Our Behaviours framework [Behaviours](#)
- 3-Day Learning Commitment Guidance [Three-day learning commitment | Inside Barnardos](#)
- Children's Service's Supervision Policy [Children's Services Supervision Policy | Inside Barnardos](#)
- Probation and Transition Policy [Probationary and transition periods policy | Inside Barnardos](#)
- Performance Improvement Policy [Performance improvement policy | Inside Barnardos](#)
- Barnardo's Strategy [Our Strategy | Inside Barnardos](#)
- People & Culture Strategy [Our People and Culture | Inside Barnardos](#)
- Learning and Development including b-learning platform [Learning and Development](#)

## 8. Compliance and Oversight

[www.barnardos.org.uk](http://www.barnardos.org.uk)

- The Risk Owner will ensure that management information demonstrating adherence to and compliance with this Policy is produced and provided to relevant parties as required and on request complete a business self-assessment;
- The Audit and Assurance Team will periodically and independently review adherence to and compliance with this Policy and associated procedures and processes across the Charity in line with their approved audit and inspection plans;
- People Teams monitoring of general adherence to policy;
- Feedback from UNISON and Barnardo's EDI Networks

## 9. Document History

Version	Date	Author	Comments	Approval
1.0	14.03.14	Policy & Advice Team		Agreed
1.1	01.02.15	Policy & Advice Team	Minor updating for LMBs and timings of APA season from 2015	Agreed
2.0	01.03.17	Policy & Advice Team	Policy updated to reflect change from APA to PDR and PDR new form	Agreed
2.1	01.08.17	Policy & Advice Team	Policy updated to include new mid-year review meeting & 3DLC	Agreed by Head of Policy & Advice
2.2	01.04.19	Policy & Advice Team	Minor updating regarding terminology, reference to Inside.Barnardo's and timing of APA season.	
2.3	01.04.22	People Strategy & Projects Team	Minor updating concentrating purely on 2022/23 plus introduction of FAQ document and updating PDR form.	
2.4	01.10.22	People Strategy & Projects Team	Updates following implementation of D365 from 1 October 2022 and logging of Mid-year reviews.	
2.5	01.04.23	People Strategy & Projects Team	Transferred to new template and policy updated to reflect transitional process for 2023.	
2.6	01.10.23	People Strategy & Projects Team	Updated to reflect continuation of existing PDR process for colleagues within D-F pay grades.	
2.7	April 2024	People Strategy & Projects Team	Policy updated to reflect revised review date in accordance with planned schedule agreed with Audit & Assurance and process applied for end of year PDR process 2023/24.	