



Changing childhoods.
Changing lives.

Barnardo's Corporate Policy

Delivering Excellence: Performance & Development Policy

Risk Owner:	Director of People and Culture
Supported by:	Employee Relations & Policy Manager
Date Approved:	1 October 2023
Date for Review:	30 June 2024
Distribution	Internal and external – not confidential

1. Purpose

At Barnardo's we are committed to delivering excellence for the children, young people and families who we support.

The purpose of this document is to set out Barnardo's pursuit of excellence in recognising the contribution our colleagues make in the work they do, and how we develop and progress our colleagues through our approach to Performance and Development.

We are now implementing how this will work across the charity, so we can better align how colleagues are enabled and empowered to deliver their role and contribute to the charity's Purpose and Strategy. Each colleague will see a link from our [Strategy](#) to their goals (objectives) and how their work is rewarded and recognised.

2. Policy

Introduction:

The pursuit of excellence is what all colleagues can aspire to. Excellence will look different to colleagues depending on the role that they do but ultimately, it is about striving for the best possible outcomes for children.

Based on the delivery of goals (objectives) and demonstration of [our behaviours](#) that reflect our core values, eligible colleagues will have the opportunity to progress their pay if they can demonstrate "excelling" or "outstanding" performance through the Performance and Development Cycle. This aligns our approach to pay of being **fair, attractive, and progressive**, and provides the opportunity for our colleagues to be recognised and rewarded with an Individual Pay Award through the demonstration of "excelling" or "outstanding" performance.

Further details on pay awards can be found in the Pay Award Policy (available soon). All pay awards are subject to affordability.

This non-contractual policy identifies the key steps of the Performance and Development Cycle and the arrangements that will apply as we introduce this new approach. Please refer to section 6 and the accompanying [Performance and Development Procedural Toolkit](#) which provides further detail on each stage of the process and what action is required.

Performance and Development Cycle - Timeline for 2023/24

This will be introduced in two steps:

- From **1 October 2023**, colleagues who sit within **pay grades A, B and C** will have this new approach introduced to their progression journey. This will affect pay from June 2024 (subject to affordability) if “excelling” or “outstanding” performance is achieved.
- From **1 April 2024**, all remaining colleagues who sit within **pay grades D, E and F** may have this new approach introduced to their progression journey. To ensure fairness, and to make sure that our lower paid colleagues are not disadvantaged, for this year only (from June), these colleagues will have their pay automatically progressed, unless they are not eligible due a ‘live’ formal warning/sanction (details available within our [Frequently Asked Questions](#)).

3. Scope

This policy applies to all eligible colleagues directly employed by Barnardo’s who have successfully completed their probationary period. This policy is not applicable to our As and When workers or Volunteers. A set of guiding principles provide further detail regarding eligibility and support for different circumstances where colleagues may not be able to complete a full Performance and Development Cycle. See [Performance and Development Cycle Variation - Guiding Principles](#).

4. Definitions and Key Concepts

Performance and Development Cycle defines the process of how Barnardo’s recognises the contribution that our colleagues make in the work they do, and how they do it, as well as how we develop and progress our colleagues in return. The process should be conducted in a fair, consistent and inclusive way and therefore, no colleague will suffer a detriment on account of a protected characteristic covered under the Equality Act. Reasonable adjustments will be considered at all stages of the process to ensure colleagues full engagement and participation.

Barnardo’s is committed to becoming a [Trauma Informed and Responsive organisation](#) and therefore a trauma informed approach should be considered in applying the process with adaptations made as necessary.

Resolution - if a colleague has any concerns regarding the application of the process at any stage, they should be raised with their line manager, or manager’s manager for early resolution. Further details and support regarding the resolution of concerns can be found [here](#). In addition, colleagues may contact their People Team where appropriate for advice.

5. Roles and Responsibilities

Colleagues	<p>Are responsible for:</p> <ul style="list-style-type: none"> • Familiarising themselves with the Pay Progression: Performance & Development home page and related links/information e.g., FAQs. • Familiarising themselves with the Performance & Development Cycle (P&D) Policy, Process Map and P&D Procedural Toolkit. • Together with their line manager collaborate and agree goals (objectives) for the year so that effort is prioritised, and colleagues understand how they contribute to our Strategy. • Actively contributing to all elements contained with P&D Cycle and process, including proactively preparing and contributing to Colleague conversations with their line manager, the mid-year review and PDR meetings. • Working in ways that are consistent with our behaviours • Achieving minimum performance and development learning goals. See our Three-day learning commitment
Colleagues providing feedback upon request	<ul style="list-style-type: none"> • are responsible for providing constructive feedback in a timely way that benefits the colleague so they can use the information for self-evaluation as well as improving current and future actions and behaviours.
People Teams	<p>Are responsible for:</p> <ul style="list-style-type: none"> • Giving advice and guidance on the Performance and Development policy, accompanying Performance and Development Procedural Toolkit, Process Map and associated P&D Procedural Toolkit. • Making recommendations for quality improvement. • Providing support to the Moderation process and attendance of Moderation meetings.
People Strategy & Projects Team	<ul style="list-style-type: none"> • are responsible for reviewing and updating this Policy and accompanying guidance as Barnardo's deems appropriate.
Line Managers	<p>Are responsible for:</p> <ul style="list-style-type: none"> • Familiarising themselves with the Pay Progression: Performance & Development home page and related links/information, including FAQs. • Familiarising themselves with the Performance & Development (P&D) Cycle, Policy, Process Map, and P&D Procedural Toolkit. • Actively contributing to all elements contained with P&D Cycle and process, including planning, preparing and facilitating meetings such as the regular Colleague conversations, the Mid-year review and PDR (refer to manager Guidance within the P&D Procedural Toolkit). • Treating all colleagues fairly and consistently throughout the process by actively listening, showing empathy, encouraging stretch where appropriate and utilising any available resources needed to support colleagues. • Continuing to support throughout the process, any colleagues where Performance improvement is identified, to enable their improvement.

	<ul style="list-style-type: none"> • Agreeing SMART goals with colleagues for the coming period, which will be regularly reviewed throughout the year, ensuring goals are relevant and link to our Strategy. • Encouraging colleagues to learn and grow throughout the year, to achieve the Three-day learning commitment, ensuring support and development is discussed. • Working in ways consistent with our behaviours. • Completing the necessary P&D recording within D365. • Saving the necessary documentation to the colleague’s electronic staff file • Attending mandatory training to support the Performance and Development policy and accompanying P&D Procedural Toolkit.
Manager’s Manager	<ul style="list-style-type: none"> • Is responsible for oversight and challenge of the Mid-year check-ins/PDRs, through regular discussions and giving feedback to their direct reports.
Moderation Chair	<ul style="list-style-type: none"> • is responsible for overseeing the Moderation process and for bringing challenge, objectivity and consistency to the Moderation meeting.

6. Procedure (Please refer to the [Performance and Development Procedural Toolkit](#) for further detail on each of these)

The key stages of the Performance and Development Cycle are set out below. Please also refer to the Process Map that provides an overview of each stage.

Goals (objectives)

- Goal setting starts the performance cycle and is a collaborative process between colleague and their line manager to determine and agree SMART (Specific, Measurable, Achievable, Relevant, and Time-bound) goals. Goals will focus on both the what and the how, enabling our Strategy and our Behaviours. Progress against goals is reviewed and assessed throughout the year to encourage growth and development. Please refer to the [Goal setting](#) guidance for further information.

Colleague conversations

- Provide an opportunity for regular conversations (informal meetings) e.g., every 4-6 weeks between colleagues and their line managers to provide colleagues with support and coaching they may need to pursue excellence and perform at their best. A guiding framework for areas of discussion during colleague conversations include wellbeing and support, workloads, progression against goals and feedback. Please refer to the [Colleague conversations](#) guidance for further information.

Children’s Services colleagues should build on the existing supervision format by incorporating an additional focus on goals and monitoring progress against these. Further details on supervision are located in the [Children’s Services Supervision Policy](#).

Continuous feedback

- Feedback is sought from a collection of diverse perspectives and regularly obtained throughout the year helping line managers to recognise the extent to which colleagues have fulfilled their goals and lived our behaviours. It includes “Formal” and “in the moment feedback”. Please refer to the [Continuous feedback](#) guidance for further information.

Mid-year check in

- This is a more formal review meeting that takes place at the mid-year point in the cycle which provides colleagues and line managers an opportunity to review the year so far and focus on excellence in the coming period. Please refer to the [Mid-year check-in](#) guidance for further information.

Reflection and evaluation

- All colleagues should provide a short summary outlining their achievements and reflect on their progress in readiness for discussion and meeting with their manager. This reflection will inform colleague’s self-evaluation. Colleagues should aim to demonstrate clearly with supporting evidence, for example through feedback from other colleagues, how they have met their agreed goals. Evaluation is done by line managers and is informed by colleagues’ self-evaluation, supporting data and feedback. Please refer to the [Reflection and evaluation](#) guidance for further information.

Moderation

- Moderation applies to preliminary ratings awarded for “excelling” or “outstanding” as well as those that are between and on the cusp of each rating. Contribution against goals is objectively benchmarked to mitigate potential bias, and to support trust and credibility within the process.
- Each Moderation meeting is led by an Independent Chair.
- Equality, Diversity and Inclusion (EDI) data is provided in advance to the Independent Chair to help control bias or other unintended outcomes.
- Final ratings and moderation outcomes are submitted to Department Leads for sign off.
- Please refer to the [Moderation](#) guidance for further information.

Outcome and Recognition

- The final stage of the Performance and Development Cycle when reward outcomes and rating are shared with colleagues and results explained. Please refer to the [Outcomes and recognition](#) guidance for further information.

7. Associated Legislation, Guidance, References and Documents

- Barnardo’s Strategy (see [our Strategy](#))
- Behaviours framework (see [our behaviours](#))
- Children’s Service’s Supervision Policy (see [Children’s Services Supervision Policy](#))
- Performance and Development Cycle Variations (see [Performance and Development Cycle Variation - Guiding Principles](#)).
- Pay progression home page (see [Pay Progression](#))
- People & Culture Strategy (see [People and Culture](#))

- Delivering Excellence - Performance & Development [Frequently Asked Questions](#)
- Performance Improvement Policy (see [Performance Improvement Policy](#))
- Process Map (provides a visual summary of the process) (Available w/c 2nd October 2023)
- Probation and Transition Policy ([Probationary and Transition Periods Policy](#))
- [Learning and Development](#) and b-learning platform

8. Compliance and Oversight

- 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	01.04.23	People Strategy & Projects Team	Transferred PDR policy into new template and policy updated to reflect transitional process for 2023.	
1.1	01.10.23	People Strategy & Projects Team	New Performance and Development policy to support Delivering Excellence ethos and approach.	25/09/23
1.2	May 2024	People Strategy & Projects Team	Policy updated to reflect revised review date in accordance with planned schedule agreed with Audit & Assurance	