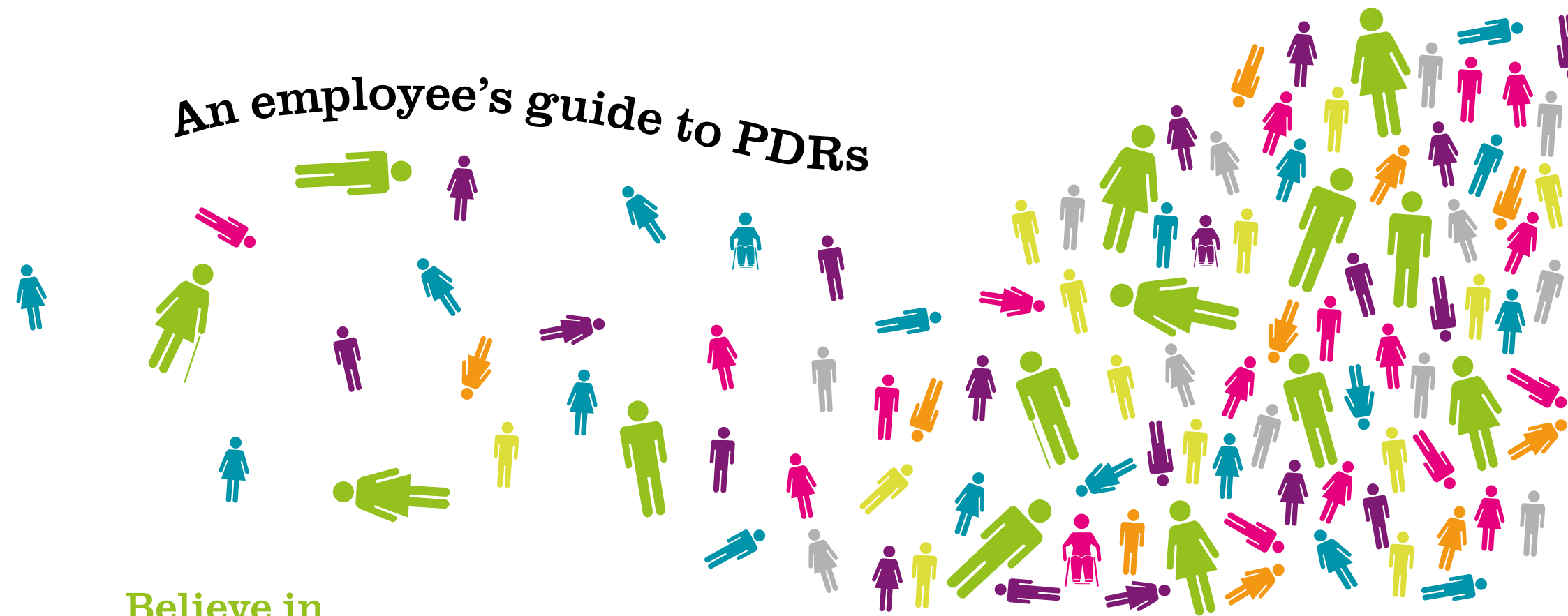


Performing at our best

An employee's guide to PDRs



Believe in
children



Barnardo's



Using the guide

This guide will help you prepare and participate in your Performance and Development Review (PDR). The guide is divided into segments to make it easy for you to access the parts you need. There are handy tips and tools to help you get the best from the PDR process.

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



Future planning



Performance and Development Review

Annual Review



Learning and development



Equality and diversity





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?

We want Barnardo's to perform to its very best and realise its ambitions. We want you to achieve this too. Performing at Our Best describes how we want our managers to lead their teams to enable this to happen.

Our aim is that all employees will receive:

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

- A Performance and Development Review (PDR) that sets SMART objectives to help you concentrate on achieving our business plans.
- A Performance and Development Review that looks at 'how' you achieve your objectives not just 'what' you 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 you learn the skills, knowledge and abilities needed to do your job well and progress.
- An organisational commitment that you should have time and opportunity to engage in learning activities and share that learning with others.

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

performing at our best!

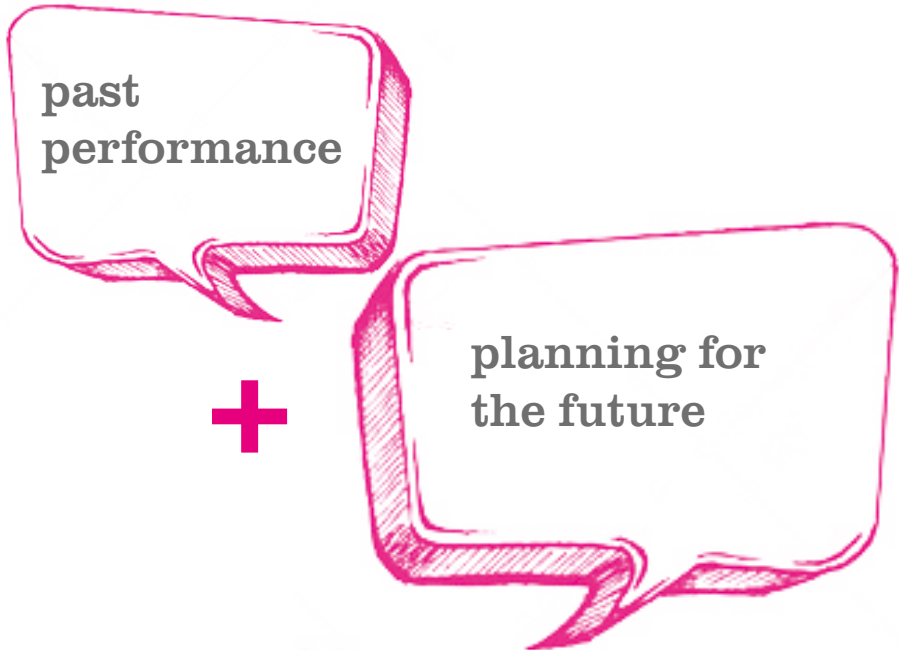




The PDR

Your PDR is an important time where you should receive recognition and appreciation for your achievements and feedback on how you can improve and develop your skills.

An effective appraisal will also give you a greater awareness of the business plan for your team and agreed objectives to focus your priorities and development in the coming year.











= performing at our best

The PDR season

PDR's are done in the PDR season during April to June. This links the objectives set in the PDR with our corporate strategy and local operational workplans. During October to December, your PDR will be reviewed to see how you are getting on with your plans, learning and objectives. This is important to ensure everyone is working together to achieve the charity's objectives and ensure we are **performing at our best**.

What are my responsibilities as an employee?

-  To fully participate in the PDR process (annual and mid-year).
-  To actively manage your own performance and development.
-  Collect evidence during the year to support your PDR preparation.
-  To complete the PDR (annual and mid-year) form in advance and give a copy to your line manager.
-  To demonstrate our Values and LMB's.
-  To seek feedback from your manager and others on your performance regularly.
-  To complete agreed actions and objectives and keep your line manager updated on your progress.
-  To ask for support and assistance when you need it.



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 conversations you have had with your managers.

- ✓ read the policy, PDR form and guidance. Ask your manager about anything you are unsure of
- ✓ Look at our values and LMB's. Reflect on how you demonstrate these.
- ✓ discuss and agree getting feedback with your manager
- ✓ review your one to one notes, any continuing professional development (CPD) and evidence you've collected to support your development through the year including any recording for The 3 Day Learning Commitment
- ✓ look at your local workplans and objectives. What does your team need to achieve in the next 6-12 months?

then...

Complete the PDR form reflecting on what you have achieved and how. Think back over the learning activities you have engaged with, what you learnt and how you shared that learning. You don't need to go in to too much detail, but give a clear summary of your views. Give your completed form to your line manager before the appraisal meeting.

Use the future planning section to suggest some objectives for the next year.



Give yourself plenty of time to reflect and complete the form; it is important and will shape the your PDR discussion.

Documents that will help you

- your job description
- 1:1 or supervision notes, past PDR documents
- notes or records of feedback you have received from colleagues, service users, managers and stakeholders
- your continuing professional development (CPD) records / learning log from Moodle
- business plans or operational workplans
- recording of your learning for The 3 Day Learning Commitment

The importance of feedback

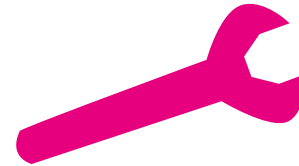
Performing at our best means working collaboratively with others to achieve results. Asking for feedback is a useful tool to help us develop and focus our efforts. Your manager will be a key source of feedback but you should also consider obtaining feedback from other sources:

-  have 1:1 reviews with people you work with
-  share emails or letters that give feedback on your performance with your line manager.

You can ask for feedback at any time during the year. As part of the preparations for your PDR you and your manager should discuss obtaining feedback to support your PDR discussion. You will normally do this in a 1:1 or supervision.

Agree with your line manager:

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



Toolkit

Example feedback questions

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

- how effectively do I work with you and your team?
- what do you see as my strengths?
- in what ways could I improve working with you?
- what did I contribute to your project/work group?
- how effectively do I communicate and share information with you?
- how could I be more effective?
- do I demonstrate our values or leadership and management behaviours (LMB's)?

The PDR

The PDR has 3 main parts.

Section 1 – Reflection and Learning – How did you do.

Section 2 – Future Planning and Continuous Improvement. What will you achieve.

Section 3 – Supporting you.

It asks you to reflect on your strengths, gaps, goals and how what you do reflects our values and LMB's. Use the questions as prompts to help you reflect on what you have achieved in the past and what you might like to do in the future. Give a **brief** summary for each.

Think back:

What has given you the most/least satisfaction?

Has your job changed?

What has been your biggest challenge?

What could you have done better?

Think ahead

What will your team need to achieve?

What new skills, knowledge or experience might you need?

How could your skills and talents be best used?

Where do you see your career in the next year?

Top Tip

Career planning isn't always about getting promoted or a new job. Many of us are happy with the roles we are doing and don't want to change jobs. Career planning means more than promotion; it's about remaining fulfilled in your job and continuing to learn.

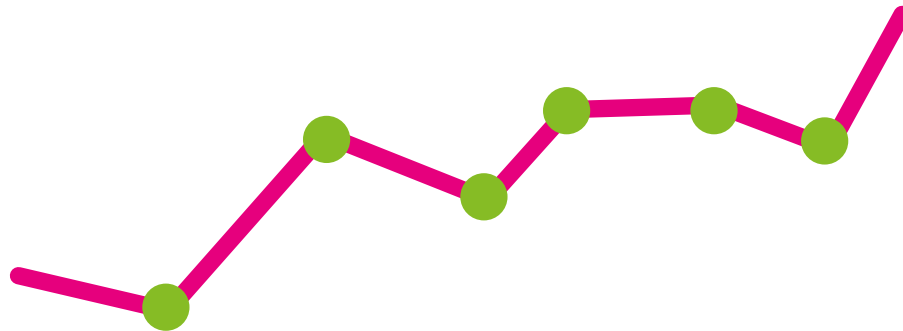
- Learning new skills relevant to your current role.
- Sharing your experience and expertise with newer colleagues.
- Taking responsibility for new tasks or projects.

Performance Ratings

During your PDR your manager will give you two ratings on your performance.

- What you do – Performance and objectives
- How you do it – our Values or Leadership and Management Behaviours.

The ratings will give you a clear understanding of your manager's view of your current performance. It lets you know what your manager thinks you are doing well and where you could develop. The focus is development and depending on the rating you receive there is suggested learning for how you can continue to improve.



Understanding your PDR ratings

- **Listen to the reasons.** Your manager should explain why each rating has been chosen and give some examples.
- **Ask questions.** If anything is unclear, ask questions to ensure you fully understand.
- **Focus on the future.** The rating and your manager's feedback should help you understand where you are doing a great job and should continue your efforts, and the areas where you could improve. If you want to achieve a higher rating, ask your manager for advice: "how can I achieve a higher rating next year?"

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

The PDR

Part 1 – Reflection and Learning (annual and mid-year)

Review of objectives

Give a short narrative summary of each objective set from the previous PDR. Give specific examples on what you did and what you achieved. If you've been discussing your objectives regularly with your line manager the evidence will be in your 1:1 records.

What if objectives have not been achieved or priorities changed?

If priorities have changed during the year the objectives can be amended and new ones agreed. Discuss this in advance with your line manager or review at your mid-year review.

Review of behaviours

Give a short narrative summary of how well you demonstrated our Values or Leadership and management behaviours.

This is the way you got things done.

Example:

Did you achieve your objectives?

1. Rewrote service information leaflets before July deadline and sourced free translation services to present the leaflets in 7 different languages.


2. Did not achieve full sales target due to shop flooding for three weeks. Took remedial action to salvage stock and reduced damages to fixtures and fittings.


The PDR


Part 2 – Future planning and Continuous Improvement (annual)

Agreeing and setting objectives

We all have a part to play in helping Barnardo's achieve its purpose to transform the lives of the most vulnerable children. This starts with the strategic business plan. These are the organisational objectives but every role fits in to that bigger picture.

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


 There will be a workplan most relevant for your part of Barnardo's. Your manager should discuss this with you and use it to help create your objectives.

 **Give your manager ideas on how you can achieve these objectives and what you could do to support your team.**

TOP TIPS objectives

 Update your manager on your objectives at each 1:1

 Ask for feedback on your progress

 If objectives are complex, break them down into smaller manageable chunks and agree interim deadlines

 Think about the support and development you need to achieve your objectives.

 Keep a record of your progress.

EDI Objectives

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

- 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.

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.
- Add EDI to our team meeting agendas each month to share learning and identify ways we can better support diverse families

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

ACHIEVEABLE – so they motivate and stretch the individual

REALISTIC – and relevant to individual's role and abilities

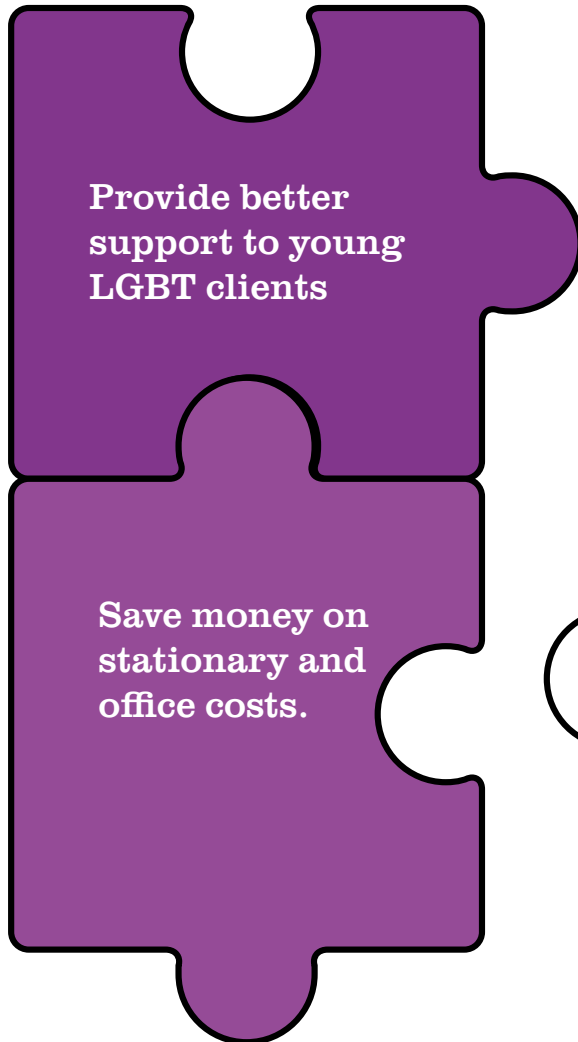
TIME BOUND – so that it's clear what has to be done by when.

Work with your manager to refine your objectives to make them SMART so that you are clear on what you need to achieve to be successful.

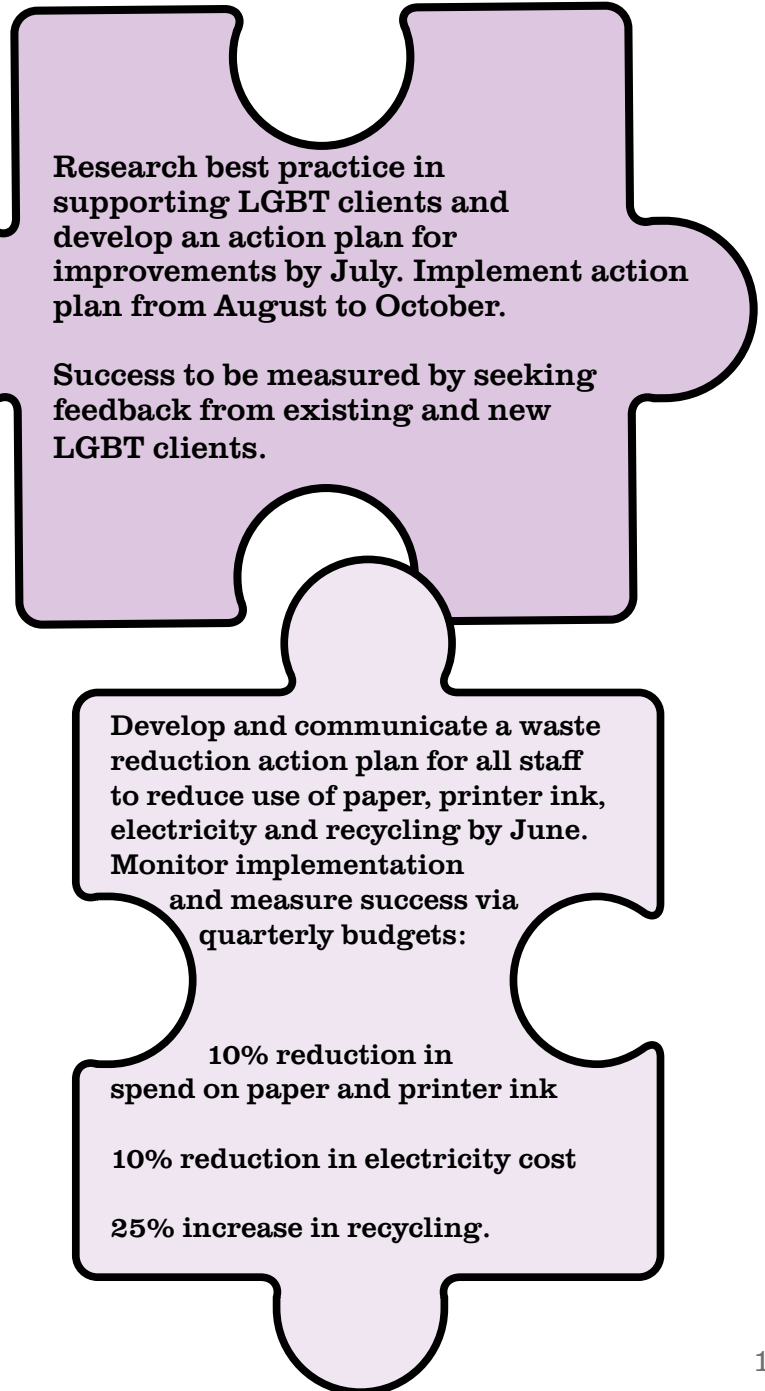
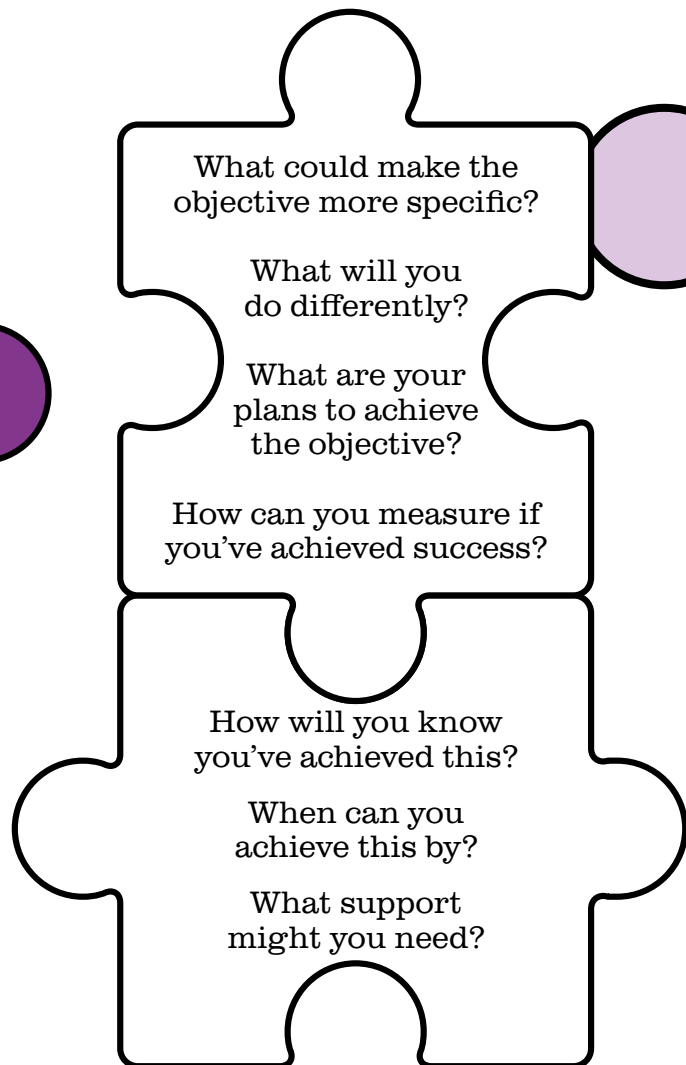
Let's look at some examples:

Improved objectives

Proposed objectives



Questions to ask











Learning and development plans

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

Take a look at the BU site to support your learning and planning, you will find a range of learning resources to support your **personal development**

Think about how you learn best. What development methods would be best value and have most impact:

-  work shadowing or job coaching
-  online learning, web groups
-  networking
-  trying new responsibilities or activities
-  coaching and mentoring
-  reflective practice (see The 3 Day Learning Commitment on page 16 for more ideas)

Get creative!

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

Find ways to embed learning in your day to day work.

How to be a skilled learner:

-  anticipate learning opportunities
-  seek out new experiences
-  recognise developmental solutions
-  seek and accept help and feedback
-  be constructively self-analytical
-  make connections between different ideas and different people.
-  collaborate with colleagues
-  create the time to learn



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).






Go to [Three-day-learning-commitment](#) on the BU for information about learning opportunities and examples of learning that others have done to give you some ideas.

Why?

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

How?

Use your PDR to reflect on:

-  The learning you have already done
-  What impact your learning made to your work
-  How you shared this learning with others (colleagues, team, organisation)
-  How much time you invested in learning activities
-  What you plans are for the next year to develop your learning through different activities

What? Here are some ideas of great learning activities





Supporting you: Equality, diversity and inclusion

We have built equality, diversity and inclusion (EDI) 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 provides 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 usual 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.

You can use the PDR discussion to ask for an adjustment based on your diversity identity. Your request should be reasonable. Think about the impact of your request on your role and team and if necessary think of ways it could be accommodated. Your manager will need to consider the request and balance it with the operational need for the work to be done. **Ask for advice from your local people team if you need support.**


Equality, diversity and inclusion is for everybody

Zero Tolerance

Barnardo's wants to create a workplace where everyone feels valued and can express their identity without experiencing discrimination or harassment. Unwanted conduct on the grounds of your diversity identity from colleagues or third parties should be discussed with your manager or people team as early as possible to resolve it. If this did not happen, you can use the PDR to share any concerns. Think about how you would like the situation to be resolved and discuss with your manager what will happen next. If you don't feel able to discuss it with your manager, please speak to your people team.

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 identity.

Look out for:

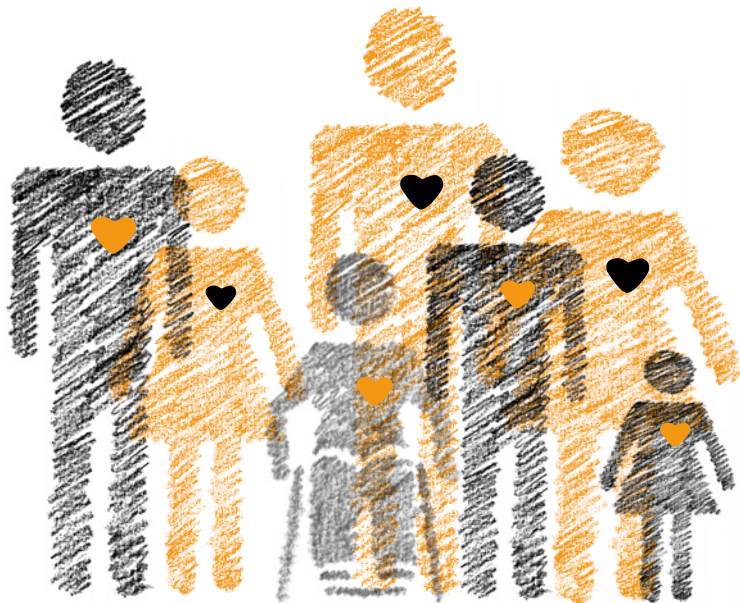


- unpleasant
- personal remarks
- bad language
- exclusion
- gossip
- unwanted nicknames

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. As part of the strategic business plan it has never been more important to consider equality, diversity and inclusion and set SMART objectives for how each of us will contribute to the goal of making ourselves a leading charity on equality, diversity and inclusion.

In preparation for your PDR, think about what actions you could take to promote equality, diversity and inclusion, or increase your knowledge and ability in this area.



Here are some examples of activities you could consider:

- ♥ 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 Equality, Diversity and Inclusion lead within your department and share your learning and knowledge with your team.
- ♥ Attend the Corporate Equality, Diversity and Inclusion 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.

Monitoring and quality

Barnardo's has a target to ensure 90% of eligible employees receive an PDR every year. The figures are reported to Directors at the end of the PDR season.

Quality is also important.

When your PDR form is complete your line manager will send it to their line manager for review. The reviewing manager will review the form for quality and consistency and write optional comments. Their role is to help support your development and your manager's development by giving feedback on the content of the PDR, checking objectives are appropriate and performance is being managed effectively.

100% PDRs completed

Target ▶

PDRs completed?



Need support and advice?

Where else can I get support and advice?

Your line manager – your line manager will be able to answer most questions you might have about the PDR process.

Local people team – your local people team can answer your queries and provide advice. If you have questions about the equality and diversity section of the form you can speak to your LPT for confidential advice.

Our Leadership and Management behaviours – a range of tools and support are available to help you understand and develop our LMB's if you are in a management or leadership role.

CPD Policy – read our policy on **continuing professional development** and use the tools available to help you plan and record your learning.

eLearning – there are a range of eLearning courses to support your continuing development. Visit the **b-Learning site** to see what might be relevant for you.

Learning Organisation – keep up to date with how Barnardo's is developing into a learning organisation via internal communications platforms.

EAP – our employee assistance helpline is available to help you 24 hours a day with a wide range of personal or work related concerns including:

- legal and financial information
- relationships
- stress, depression and anxiety
- health

Call the free confidential helpline on
0800 030 5182

or minicom

counsellingadvice@healthassured.co.uk

or email

counsellingadvice@healthassured.co.uk

or visit

healthassuredeap.co.uk

and enter Barnardo's in both boxes.