



Performance Development Review

Purpose

The Performance Development Review (PDR) process plays a critical part in achieving Future Directions CIC objectives and helps each of us understand our contribution and the importance of our role in Future Directions CIC.

1. Introduction

Future Directions CIC is committed to the development of knowledge, skills and experience for all staff in order to promote individual development and meet services objectives. This document will provide a structured but flexible system which is consistent across all staff groups. Performance and Development Planning is fundamental to developing all staff within Future Directions CIC.

The Performance Development Review will provide the basis for continual staff development, succession planning and career progression and secure a workforce with the capacity to adapt to the challenges of Social Care Provision

2. Objectives of Performance and Development Review

To ensure that Future Directions CIC staff are able to:

- Review your performance against objectives and recognise and acknowledge your individual achievements and contributions over the past year.
- Agree objectives and articulate clear expectations of your performance for the next twelve months.
- Review your behaviours and ensure they reflect Future Directions CIC values.
- Give you time to think about and identify appropriate learning and development needs for your role.
- Develop an appropriate PDP (Personal Development Plan) linked to your objectives/ behaviours.

To ensure that Future Directions CIC is able to:

- Provide individuals with feedback on their performance, strengths and developmental needs.
- Align the contribution of individuals and teams to the mission and values of Future Directions CIC.
- Identify and agree learning and development needs for its staff in both the short and longer term.
- Agree actions and objectives for the following year aligned with the mission, vision and values of Future Directions CIC.

3. Principles

- 3.1 All individuals will have a performance development review annually. The focus of the review will be to evaluate/assess the individual's performance and learning and development needs for their post. This will take place between the staff/reviewee and their Team Manager/Reviewer.
- 3.2 The performance and development review aims to strike a balance between reviewing performance, agreeing objectives, targets and/or activities and identifying development areas that will help meet them. Included in this is the meeting of Future Directions CIC and/or your department's strategic objectives.
- 3.3 Future Directions CIC expects the Team Manager/Reviewer to have had regular contact with the individual post holder and to have engaged in regular discussions/management supervisions throughout the year, providing constructive feedback on their work and development. The performance and development review is an opportunity to think about this in a structured way.
- 3.4 If any issues/problems have been identified in an individual's work or development during the year, these should be addressed at the time they arise; they are not to be left until the performance and development review. Any disciplinary issues must be dealt with through the Performance Improvement Procedure.
- 3.5 Future Directions CIC endorses the principle of '*no surprises*'. The Reviewer should confirm and summarise feedback that has been ongoing and is constructive to the individual.
- 3.6 The review will include overall performance in the post, the meeting of Future Directions CIC and/or their department's strategic objectives, and the meeting of previously determined personal learning and developmental objectives.
- 3.7 The Reviewer is required to prepare fully before the meeting and be prepared to present supporting evidence for all observations and conclusions.
- 3.8 The performance and development review will be properly scheduled. The Reviewer should schedule the meeting well in advance, giving at least 7 days notice to the individual.
 - The review will typically take from 1 to 2 hours.

- There will be no interruptions.
- 3.9 The performance and development review is a two way interaction between the Team Manager/Reviewer and the individual/reviewee. The performance development review will be conducted as a two sided exchange. Future Directions CIC recognises how one to one discussion helps to assure the acceptance of outcomes as well as meaningful follow up action.
- 3.10 The Performance and development review will enable the individual post holder to link their performance to the overall effectiveness of their department and/or Future Directions CIC objectives.

4. Applying the Process

4.1 Preparation for the Performance Development Review

Section 1A: Review of my Overall Performance

Prior to the performance and development review, the Reviewer will contact the individual to agree a mutually convenient date and time for the review. The Reviewer will provide the reviewee with **Section 1A: Review of my overall performance**, and encourage them to complete this prior to their meeting. This provides the reviewee with the opportunity to reflect on their performance over the past twelve months.

Section 1B: To be Completed by the Reviewer

Section 1B should be completed by the reviewer prior to the meeting. This allows the reviewer to reflect on the reviewees performance over the past twelve months, their strengths, any areas for development and what learning and development needs they have in order to be able to carry out their role effectively.

- 4.2 When completing this form the reviewer should:
- Give concrete examples when discussing the reviewees performance i.e. both strengths and areas for improvement.
 - Give positive feedback first before discussing areas for improvement.
 - If there are areas for improvement/development, consider in advance how these might be met.

5. Joint Review Discussion and Use of Documentation

- 5.1 On the agreed date, the Reviewer and the reviewee will meet to discuss the employee's performance and development over the previous year, review the application of knowledge and skills and how any learning or development activity has improved the service. A personal development plan will be developed and agreed.

The individual will have the opportunity to discuss their progress and how they are developing in the role. The Reviewer will provide honest and constructive feedback. The Team Manager should provide constructive feedback throughout the year and therefore, in principle, there should be 'no surprises' in this part of the discussion.

5.2 Personal Information Form

At the beginning of the meeting the reviewer should complete the Personal Information Form.

5.3 Joint Review Discussion

Section 1A: Review of my overall performance and **Section 1B: To be completed by the Reviewer** which will have been completed prior to the meeting, should form the basis of the two way discussion on the reviewees overall performance and development over the last 12 months and help to identify objectives for the next 12 months

5.4 Section 2: Review of last years objectives

Identifies which objectives from the previous 12 months have been met, which have not been met and why. The reviewer and reviewee can the jointly identify and agree ongoing and new objectives for the next 12 month period

5.5 Section 3: My Career Aspirations

This can be used as a prompt for reflexion and discussion around career development and progression. How do you see your future? How do you see your career developing?

5.6 Section 4: How my role supports delivery of Future Directions CIC key values and priorities

This form will be used to set out the key performance objectives for the reviewee for the following 12 month period. They should be linked to Future Directions CIC mission, vision, values and priorities. The objectives should be agreed on by both the reviewee and the reviewer. The objectives should be:

Simple and Specific - what in particular needs to be achieved?

Measurable- how will you know whether you have met the objective or not? How will you measure it?

Achievable - can you achieve them; do you have sufficient resources, and the right skills and knowledge?

Relevant- are they specifically linked to the work you do?

Timed - when do you want to achieve them?

5.7 Section 5: Personal Development Plan

This form should be completed as part of a joint discussion on the reviewees learning and development needs and how these can be met. The priority is to identify learning and development needs that will provide the individual with the necessary skills to enable them to carry out their job effectively.

Statutory and Mandatory training needs should also be discussed and clearly identified to meet Future Directions CIC training standards.

The Personal Development Plan should be linked to Future Directions CIC's mission, vision, values and priorities outlined on page 3 and 4 of "**My Performance Development Review**" paperwork.

5.8 Section 6: Progress Review

This form will be used at each review discussion of the objectives set at the annual Performance and Development Review meeting. Use it to record:

- Progress made in relation to objectives
- Any issues preventing achievement of objectives and solutions to these
- Any new objectives set
- Feedback from reviewer on reviewees performance. A copy should be kept by the reviewer for their records in a secure place and a copy given to the reviewee for their personal records.

5.9 Section 7: Record of Performance and Development Review

Once the Performance and Development review has been completed the, Section 7: Record of Performance and Development Review form should be completed and returned to the Marle House to be recorded on the staff training database.

It is important that these details are recorded on the system in order to monitor Future Directions CIC standards and Quality Assurance Program.

Paperwork completed as part of the Performance Development Review process should be completed in partnership between the Reviewee and Reviewer.

6. Storing Of Documentation

- 6.1 All documentation related to the Performance and Development review is confidential and will be securely stored. The individual post holder has a copy of their performance development review documentation which will be stored in their personal development portfolios.
- 6.2 All documentation must be jointly signed by the individual/reviewee and the Team Manager/Reviewer.



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Appendix A

GUIDANCE NOTES FOR THE REVIEWER

1. All Reviewers will have received training prior to conducting their first Performance and Development Review.
2. Arrange the review in advance giving at least 7 days notice.
3. The review time is protected time.
4. The meeting should be held in a room where there will be no interruptions e.g. phones ringing.
5. Arrange refreshments.
6. All Reviewers will be guided by the principle of 'no surprises' in the Performance and Development Review Process.
7. Begin by explaining the purpose and scope of the review. This will be particularly important and may take more time when the review is the individuals first.
8. Prepare properly, following regular contact with the individual over the 12 months, this is the time to give structured feedback on their work against the job description.
 - Discuss the job in terms of its application of skills required.
 - Encourage the individual to discuss their achievements and development areas.
 - Consider the evidence brought by the individual.
 - Offer examples of what the individual has done well and examples of things that have not gone so well.
 - Provide feedback in a way that focuses on what the individual had done not on what they are like.
 - Discuss with individual how far agreed development objectives have been met.
 - Discuss evidence to support any development decisions made with the individual and record this in their personal development plan.
 - Work jointly with the individual to identify where the individual needs further development and the areas that are most important.

- Agree personal development decisions with the individual.
8. Facilitate a joint discussion between self and individual, managing different points of view.
 - Encourage the individual who is being reviewed to take an active part in the review.
 - Encourage the individual to speak.
 - Listen to what they have to say.
 9. Jointly compile the individual's Objectives and Personal Development Plan.
 10. Complete jointly with individual the appropriate documentation.
 - Ensure that all documentation is signed where required by both self and individual.
 - Make sure the individual has a signed copy of the Performance and Development Review Forms.

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Appendix B



PERFORMANCE and DEVELOPMENT REVIEW (APPRAISAL)

Personal Information

Before completing your PDR documentation, you should read through the guidance notes attached

Date	
Place of Work	
Job Title	
Name of Reviewee	
Name of Reviewer	

OUR MISSION

To promote recovery and quality of life through effective, innovative and caring health, social care and specialist community services.

Our Mission:

To be the best provider for all the services we deliver

Our Values:

1.	Quality - Delivering Safe and Effective Person Centred Services
2.	Respect - Valuing the Unique Contribution of Each Individual
3.	Innovation - Driving Originality of Service Design and Delivery By Appropriate Research And Evidence Based Practice
4.	Value – Delivering Best Value and Efficient Use of Resources
5.	Collaboration - Building Partnerships and Co-Operation by Engagement, Involvement and Joint Effort
6.	Partnership - Working Together to Achieve More
7.	Growth – Bringing Opportunities for Investment and in Service Development

Section 1A: Review of my overall performance

Prior to your PDP - think back over the last twelve months and answer the following questions:-

1. My overall performance was

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2. Key areas of achievement have been

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3. I feel I could improve on

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5. Areas of frustration have been

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6. This year I would like my contribution to be

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Section 1A: Review of my overall performance

Prior to your PDP - think back over the last twelve months and answer the following questions:-

7. I have kept up to date with all of my statutory and core training requirements

Yes

No

8. If no, why and how will you get up to date with statutory and core training requirement.

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Section 1B: To be completed by the Reviewer

- 1. Has the reviewee met their objectives in the past year? If no, please comment why.**

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- 2. Please comment on the reviewee's overall performance this past year.**

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- 1. What are the reviewee's key areas of strengths and areas for development? (Please ensure that person's strengths and areas for development are Reflected and considered in their personal development plan on page 11)**

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Section 2: Review of last years objectives

During your PDR, discuss with your reviewer the following questions

1. The objectives I have met over the last year are

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2. The objectives I have not met are

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3. The reasons for me not meeting these objectives are

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4. The objectives I would like to carry forward to this year are

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Signed (Reviewee)

Signed (Reviewer)

Section 3: My Career Aspirations

If you wish to discuss your career aspirations with your reviewer, please capture your discussions here (OPTIONAL)

Where I see myself in 1 year

Capture your discussion here:

Where I want to be in 5 years' time

Capture your discussion here:

What development opportunities (e.g. projects, secondments etc) I would like to be considered for to help me to achieve my ambitions

Capture your discussion here:

Section 4: How my role supports delivery of Future Directions CIC key values and priorities
(Please cross reference and indicate by reference number which value and priority your objective support – these are detailed on Pages 3/4)

Key Objectives	What will you achieve and by when	Please identify which Company value and/or key strategy is being delivered through this objective?

Quick check - your objectives should be:

S - Simple and Specific- what in particular needs to be achieved?

M - Measurable- how will you know whether you have met the objective or not? How will you measure it?

A - Achievable - can you achieve them; do you have sufficient resources, and the right skills and knowledge?

R - Relevant - are they specifically linked to the work you do?

T - Timed - when do you want to achieve them?

Section 5: Personal Development Plan

(Please cross reference and indicate by reference number which value and priority your objective support – these are detailed on Pages 3/4)

Learning & Development Area (NEEDS). (e.g Maths/English/IT skills development)	Learning & Development Activities (SOLUTIONS). (e.g. Skills for Life course/Essential IT skills CD Rom e-learning)	What will I be doing differently when the development objective is completed (OUTCOME). (e.g. Completing additional tasks or existing tasks with increased confidence/ability levels)	Which Company value and/or key strategy is this linked to?	Target Date

Section 6: Progress Review

Review meeting 1: (within 3-6 months of my PDR)	Date
What was discussed and agreed	
Review meeting 2: (within 6-9 months of my PDR)	
What was discussed and agreed	
Review meeting 3: (within 9-12 months of my PDR)	
What was discussed and agreed	

Section 7: Record of Performance and Development Review

Please complete this form and return to the Learning and Development Department ?

Name of Reviewee	
Job Title and Place of Work	
Name of Reviewer and their Status	
Date of Performance and Development Review (Appraisal)	
Date of Next Performance and Development Review (Appraisal)	
Does the Reviewee have a Personal Development Plan? (please tick relevant box)	
Has the Reviewee undertaken Supported Development/Training? (please tick relevant box)	
Confirm that the Appraisal competency is linked to the Reviewee's record via Supervisor Self Service?	
Please list Learning and Development Needs Identified	



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Appendix C

PREPARING FOR YOUR PDR A GUIDE FOR ALL STAFF

Introduction

These guidelines have been developed to support you in achieving an effective and meaningful Performance and Development Review (PDR). It is everyone's responsibility to provide the very best care to our service users and carers and consistently high performance will help us achieve this.

One of the ways we can work to embed a high performance culture in Future Directions CIC is through the use of a performance review experience that places you at the heart of the assessment and development process. You have the right to receive a transparent and objective assessment of your performance and be given equal opportunity to develop the skills, knowledge, attitudes and behaviours you need to perform effectively.

It is important that your PDR is a positive and constructive experience, with no surprises.

Capability or disciplinary matters should be addressed during your PDR, but as and when they arise using the appropriate Future Directions CIC procedures.

Our Commitment to the PDR Process

We are committed to the implementation of a positive and rewarding PDR experience that will support you and enable you and your team to consistently achieve the high levels of performance.

We will demonstrate our commitment to the PDR process by:

- Working hard to ensure everyone in Future Directions CIC has an annual PDR with clear objectives and a Personal Development Plan (PDR).
- Striving to make sure your PDR experience is positive and supportive and makes you feel valued.
- Providing you with guidelines to an effective PDR, with standard documentation auditing the number and quality of PDRs on a regular basis.
- Providing an equitable programme of development activities to support your learning and development needs identified in your PDP.

The purpose of your PDR is to:

- Review your performance against objectives and recognise and acknowledge your individual achievements and contributions over the past year.

- Agree objectives and articulate clear expectations of your performance for the next twelve months.
- Review your behaviours and ensure they reflect Future Directions CIC values.
- Give you time to think about and identify appropriate learning and development needs for your role.
- Develop an appropriate PDP linked to your objectives, behaviours.

Your role and responsibilities in the PDR are to:

- Engage with the PDR process and work collaboratively with your reviewer to ensure your review is meaningful.
- Prepare for your PDR by reviewing your performance and achievements in the previous year and consider appropriate objectives and performance for the next twelve months.
- Use the documentation as the agenda for the meeting and work systematically through each of the sections. This will involve you listening, sharing views, hopes and concerns.
- Ask for clarification on any aspect of the PDR you do not understand – such as the process, documentation or confidentiality.
- Talk freely about your work, performance, skills, behaviours, concerns and the future.
- Listen and understand your reviewer's point of view.
- Give specific examples of your performance over the last year including examples of where your performance could be improved.
- Reflect on previous development opportunities and identify possible future development, agreeing how you will meet and review these.
- Agree with your reviewer your objectives, clear expectations of your performance and priorities for the next twelve months.
- Record the outcomes of your discussion and objectives agreed on the PDR form and agree a follow up review date (within three to six months of your PDR) to review your progress.
- Update your PDR records as the year progresses.
- Undertake all learning and development activities identified in your PDP and share your learning where appropriate.
- Keep up to date with all your statutory and core training requirements.