



Performance Development Framework

2023-2024





Performance Development

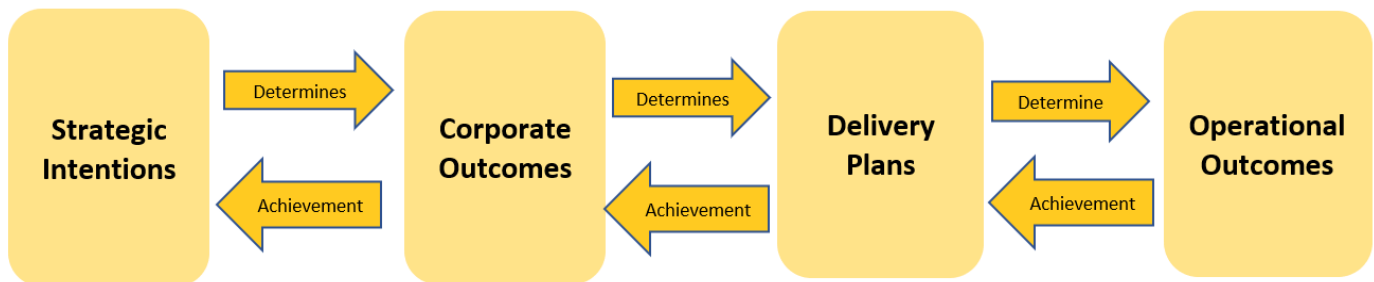
INTRODUCTION

Our performance, both as individuals and across our teams is vital in setting out how Bield will achieve the ambition set out in our Strategy. This framework supports how we will work together to ensure that Bield is delivering and providing high quality services to our tenants, customers and stakeholders.

The Framework will enable greater consistency and clarity on what is expected of each of us, establishing key deliverables and outcomes that align to Bield's priorities. Helping us have shared sense of purpose about what needs to be delivered, with our values and core competencies underpinning how we work with each other, our service users, tenants and stakeholders.

For colleagues, the Performance Development Framework sets out the commitment expected for each of us in taking time to focus on giving and receiving feedback. Creating the platform for us to recognise achievements and to plan ongoing development and work priorities.

Our Strategy '**Setting the Pace, our people, our homes, our communities**' sets out our ambition and direction, with our **corporate business** plan bringing to life the Outcomes set at an organisational level, these in turn determine Delivery Plans and the Operational Outcomes for teams and individuals. As teams and individual colleagues achieve their outcomes, this then in turn supports the achievement of Delivery Plans and Corporate Outcomes.



The relationship between employee-manager is at the heart of effective performance development. Our framework aims to focus on the importance of these relationships, simplify the process & supporting paperwork and provide toolkits & guidance to support colleagues use the framework effectively. The framework includes both formal and informal aspects of performance development.



Performance Development Framework

The Performance Development Framework outlines the normal annual key stages for Bield employees, it captures formal process, standards expected and support for individuals and managers.

Set Direction

The Big Picture - Leaders and managers work with their team(s) to look at their Directorate Delivery Plan & how they will contribute to delivery to Bield's Strategy and Business Plan (April each year)

Regular Check Ins

Regular Check Ins

Set Objectives

Individual purpose - all understand their role and agree with managers their delivery targets, with milestones, measures, reviews and support & development needs (May/June)

Mid-Year Review

Mid-year assessment - interim progress review against individual, directorate and business plan, feedback, scanning ahead and agreed deliverables (November/December)

Quarterly Business Reviews

Quarterly Business Reviews

End of Year Review

Full year assessment - a look back at the years performance with reflection on strengths and development, used to inform planning for the next reporting year (May/June)

Regular Check Ins

Exceptions to normal procedures



New employees still within their probation period, who will follow [Induction and Probation Policy](#)



Any employee requiring additional support with their performance may move to follow [Capability Procedure](#)



Informal Performance Development

Regular check ins /Good conversations



The most significant impact on performance development is the regular interactions that an individual has with their line manager – not the annual appraisal meeting.

Sole focus on traditional formal performance development can mean the focus becomes too much on the process and paperwork quality and not quality of performance conversations.

Whilst our framework uses a template form and an annual formal structure, this is only part of driving good Performance Development. The PDP creates a platform for a discussion at the start of the year to set expected deliverables and outcomes so there is clarity about what is expected.

The PDP form supports clarity, shared agreements and monitoring progress, it also asks colleagues and their managers to keep looking forward in shaping performance and delivery - not just to assess past performance.

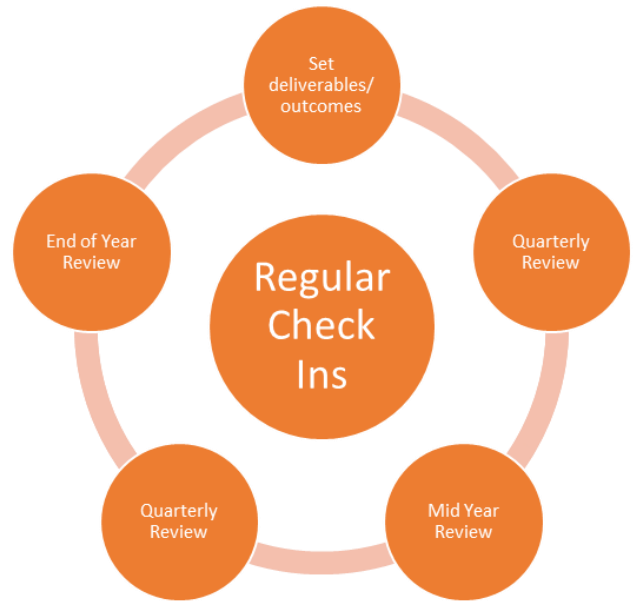
Looking forward allows space to identify changes or activity required to keep deliverables on track. High performance is built on regular check ins, ongoing dialogue between colleagues, teams and managers around work priorities, development and feedback. These may be referred to as



- 1:1s
- Supervision meetings
- Catch ups
- Work planning meetings
- Team meetings

Performance Development can be something that is touched upon in lots of informal conversations and meetings that managers have with their team (both individually and collectively).

Regularly taking time to talk helps managers have a more proactive coaching role supporting employees to drive delivery and strengthen performance, it encourages and empowers. The formal mid and end of year reviews then add value with records on progress and structure.



Check ins can help foster trust, good communication and stimulate two-way feedback which helps create shared responsibility. The pattern and timing can be set to suit the needs of the role, objective and individuals. For new employees, periods of change or challenging work programmes then more frequent meetings will be essential for individuals and teams.

Where individuals are experiencing particular challenges or require development or additional support, then check ins help monitor impact and progress. How these take place should be mutually agreed by managers and each individual employee, reflecting what is right for both, with flexibility to change as required.

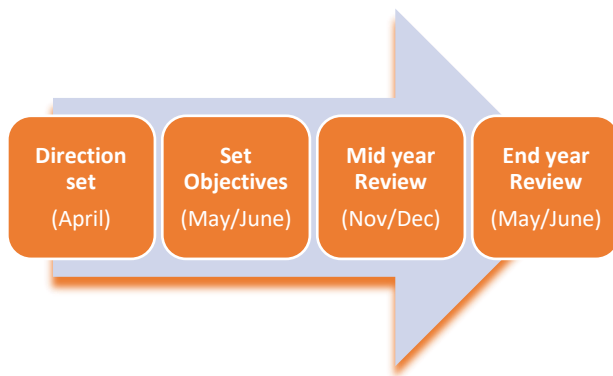
It is important that managers do not just lead check ins, we can all take responsibility for making sure we get the support and connections we need. They can be a mixture of length and format, taking place face to face, virtually or a combination of both.

There is no single template for every check in and by their nature many will be informal chats. However, capturing outcomes from conversations helps clarity of agreed actions/priorities/deadlines and where there are concerns capturing impact and progress. Ongoing concerns may lead to requirement for support under our **Capability Procedure** and records from check ins can help with the informal stages.



Formal Performance Development Process

Performance Development Plan (PDP)



The formal Performance Development (PD) process is where we use the PD Plan (PDP) to formally set and capture progress on individual performance across the year. It ensures both manager and employee have a shared summary record about what was discussed and agreed with expected outputs / measures understood.

The template is the direct link between the strategy and business plan to individual commitment and roles. The updated forms can be found here [Colleague](#) or [Leader](#) (depending on job role).

The value of the PDP is the responsibility of both the individual and their manager. It is there to help shape the discussion of how we all help support Bield in delivering for our tenants and customers, and how we ensure compliance and assurance in how we operate. The corporate objectives are pre-set on the form to help all understand where their contribution is supporting Bield and how we connect across teams and services.

The form should be used as the guide over the year and updated if work changes or as you track progress. It is a confidential document between the individual, their line manager, Bield management and Human Resources.

The PDP is designed to be completed and stored electronically. For employees who do not have a personal log-on to Bield IT systems, it is more practical for managers to hold the electronic copy of the form but the employee should always have access to a printed copy.

Start of performance cycle

The annual performance cycle begins with meetings to set and agree performance objectives for the forthcoming business plan and directorate plans.

Meetings will normally be held from 1 May through to the 30 June to plan for the year ahead but can be held in any month of the year as appropriate (e.g., if an employee starts with Bield or changes role's part way through the year or there are internal changes to Bield's business plan).

The initially meeting will also be used to explore and identify any development required to support the achievement of the performance objectives.

The manager and employee should both prepare in advance of the meeting. Preparation for the meeting could include:



Reference to Bield's strategy, Business Plan and Delivery Plans



Align personal objectives to Team and Directorate Plan meetings for the coming year



Capture commitment to deliver against our core competencies, values and professional standards



Identify support and development requirements



Signpost career aspirations or areas of growth

Guidance on how to complete the form can be found [here](#).

Bield's values are core to how we want all to work. In addition, we have identified 4 key competencies that cut across all areas of Bield and capture a combination of the skills, knowledge, attitudes and behaviours that are required by everyone as we carry out our roles. An additional 2 competencies have been identified for roles at Leadership Team level and above.



Individuals and managers should discuss and agree some personal commitments to deliver against specific values, core competencies and relevant professional standards over the year.

1. Leadership and Management

Taking responsibility for our own performance, and supporting an excellent workplace approach to helping people to demonstrate their full potential, through motivating and developing all to perform.

2. Health & Safety

Understanding the importance of health & safety and the role we all play in helping keep Bield a safe place to work and for our tenants to live.

3. Customer Service

Identifying, understanding and giving priority to meeting the needs of internal and external customers*, to provide the highest standards of service for Bield.

** Tenants, customers, stakeholders, colleagues, members of public, this can be anyone affected, directly and indirectly by your work*

4. Diversity & Inclusion

Carrying out our roles in a way that seeks to embrace and celebrate our differences. Working collaboratively to build workplaces and relationships that promote opportunities for all to be heard, included and encouraged.

Additional competencies for roles at Leadership Team level and above:



5. Financial Management

Taking responsibility for controlling expenditure and driving efficiencies to achieve value for money.







6. Influencing

Sharing our experience & expertise and collaborating with key partners to influence the delivery of housing for older people.

Once the PDP has been completed and agreed this will be the guide for individuals in managing their focus and effort over the year.






Mid-Year Review

A formal mid-year review should take place at the 6 month point of the performance year (normally November-December). This formal meeting provides space for the individual and manager to meet and:

-  Review progress (against outcomes expected & learning planned)
-  Celebrate achievements
-  Discuss any challenges to delivery
-  Provide feedback (what when well, what could have gone better)
-  Refocus /reprioritise or plan corrective action required to get plans on track
-  Scan ahead for emerging work / anticipated challenges

End of Year Review

A formal end of year review should take place at the 12 month point of the performance year (normally May-June). This provides the opportunity for:

-  Reviewing progress (against outcomes expected & learning planned)
-  Celebrate achievements / discuss barriers to progress
-  Provide feedback (what when well, what could have gone better)
-  Starting to plan for the next performance cycle
-  Identifying anything that needs to be carried over to the next year

As the Performance Development cycle runs each year there will be additional opportunities to individuals and their managers to track progress and look at priorities for the year ahead. These will be as part of the Business Performance cycle. Guidance on how these align to Performance Development can be found [here](#)