

1. Introduction

A key priority for Bield is to move towards a new and simplified appraisal system that better recognises the link between what we do day to day and how, together, we achieve Bield's mission to improve the quality of life of older people by offering a diverse range of housing, care and other services. Therefore, the current staff appraisal systems in place across Bield will be replaced with a new Performance Development Framework (PDF) for all employees. The board are placing greater and greater importance and scrutiny on the PDF as there is a direct link between successful companies and the active use of performance management processes.

These guidelines outline the main components of the PDF and the step-by-step guide to the process for managers and employees. The guidelines cover:

- Performance Development Framework
- Performance Development Plan
- Step by Step Guide to the Performance & Development Process & Meetings
- Manager and Employee Support & Feedback on the Performance & Development Framework
- Setting Performance Objectives
- Bield Values Framework
- CIH Professional Standards
- Development Discussions
- Career Progression Discussions
- Recording PDF meeting

Please also read 'Performance Development Framework' Section 10.3 of the Employee Handbook, Guidance PDP Form and this entire document carefully before you begin the process and complete the PDP form. The Performance Development Framework section of the Working Life Area of Grapevine also has more information and support.

2. Performance Development Framework

The Performance Development Framework is a tool for managers and employees to ensure Bield is continually achieving high standards of performance and service to our customers and stakeholders. It consists of the following main components:

- Performance objectives
- Bield values
- Development
- Career planning

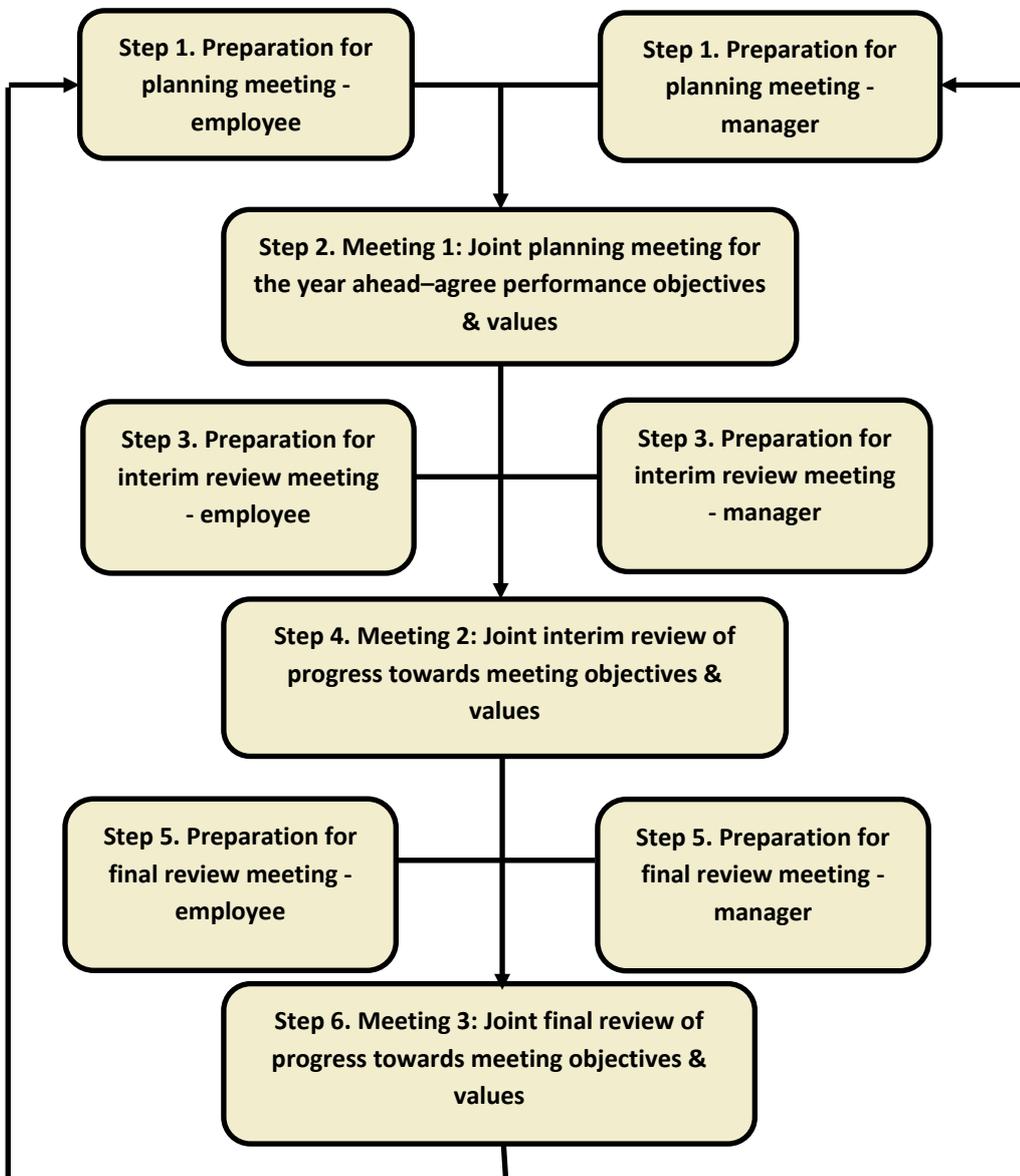
The framework is part of how we will ensure that Bield is achieving high standards of performance and service to our service users, tenants and stakeholders. It's use will help provide greater consistency and clarity on what is expected of each employee through setting performance objectives (often called a goal or target) that align to Bield's priorities on **what** needs to be delivered and using Bield's values as the standard on **how** we work with each other, our service users, tenants and stakeholders. For employees, it provides dedicated time with your manager for support, giving and receiving feedback, recognising your achievements and development planning.

Performance Development Framework Guidelines



For more information on the Performance & Development Framework please refer to section 10.3 of the Employee Handbook.

Performance development will happen on a continuous basis and through a minimum of three structured performance development review meetings per annum following the process outlined below. If a manager and/or employee establish the need to meet on a more frequent basis, then these will supplement the planning, interim and final performance and development meetings.



The table below provides a guide on the timescales for the Performance and Development Framework meeting cycle that aligns with Bield's business year from the 1 April through the 31 March.

Month	What	By When
March/ April	<ul style="list-style-type: none"> Set and agree performance objectives for the forthcoming business year from 1 April through to the 31 March. 	30 April
October	<ul style="list-style-type: none"> Conduct and complete the Performance Development Plan Interim Review and complete the Development Needs & Career Discussion. 	31 October
April	<ul style="list-style-type: none"> Conduct and complete the Performance Development Plan Final Review and up-date the Development Needs & Career Discussion as appropriate. 	30 April

3. Performance Development Plan

The Performance Development Plan (PDP) forms the basis for the performance and development meetings and ensures that both manager and employee have a shared summary record about what was discussed and agreed. The form is not designed to document a detailed workplan or an accurate record of the discussion during the performance and development review meetings. The PDP form is used to record the agreed objectives, timescales and performance against the objective etc. Please see the “**Performance Development Plan - Form**”.

Both parties are responsible for completing and up-dating the form and once completed with personal information on employee performance and development it becomes a confidential document between the employee, line manager, Bield management and Human Resources.

The forms are 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. Clearly if there is any disagreement on the content of the form or if something has been incorrectly recorded, you should discuss it and if necessary change it.

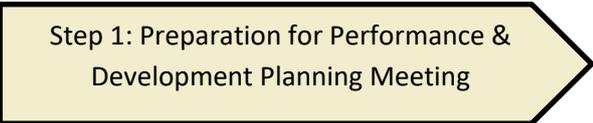
The amount of space provided in any one section of the form is not necessarily a guide to how much you are required to write. If a brief note describes what you wish to say then that will do. If, on the other hand, you feel you need to go into more detail then feel free to add it to the last section on the PDP form.

4. Step-by-step Guide to the Performance and Development Process

This section provides a step by step guide to the Performance & Development Framework as outlined in section 2 of this guideline.

Step 1 & 2: Performance & Development Planning (Meeting 1)

The Performance Development planning meetings are to set and agree performance objectives for the forthcoming business year ideally from 1 April through to the 31 March and identify any development required to support the achievement of the performance objectives. These meetings are ideally held in April to plan the year ahead, but you can start any month of the year as it is more important to have the meetings and start the process that wait till April. Regardless of the starting month we recommend a 6 month interim review and final review after 12 months. The final review can be combined with objective setting for the next year.



Step 1: Preparation for Performance & Development Planning Meeting

The manager and employee will both prepare – separately - for the performance and development planning meeting. Preparation for the meeting could include:

- At the start of the new business year (April) there is a briefing for managers and employees setting out the business plan and priorities for the year ahead. These will be saved on Grapevine for access throughout the year for future reference. Please ensure you familiarise yourself with the content of these briefings and if you are unsure please ask your Head of Service or Director.

- Directors and Heads of Service will also communicate the department priorities and plans to set out how the department will work towards achieving Bield’s annual business plan.
- All jobs within Bield have a job description that sets out the purpose of the job and the main accountabilities. It is important that the performance objectives are aligned to delivering what is expected of the job holder.
- Managers and employees will need to set team and/or individual objectives for the year ahead that will align and contribute to the delivery of the departmental and Bield business plan and in delivering our services to our customers and stakeholders. It is important you both think about what you need to achieve in the year ahead, priorities, the timescale you can achieve the objective and how it can be evidenced when the objective has been met. Your preparation here will be used to shape the performance objectives. **For further guidance and support on setting performance objectives please refer to Appendix 1.**
- Managers and employees also need to review the CIH Professional Standards elearning on Academy10, Bield Values Framework and the positive indicators for demonstrating the Bield values in the workplace. **Please refer to Appendix 2 and 3.**
- Ensure you both have a good and shared understanding of what is expected and if you are unsure or have a question then ask your manager. Think about the values you/ the employee is demonstrating and the areas where you/the employee could develop further in your/their interactions in the workplace. The values are to be consistently demonstrated on an on-going basis and not by exception. Therefore it’s important to think about how you/the employee might demonstrate the values in your daily work and how the employee and manager will capture examples of this.
- In thinking about the year ahead or the previous year, are there any development areas that you/the employee would like to discuss in the meeting. Be clear on the development need and think of solutions to meet the development need. **Please refer to Appendix 4.**
- The employee should also think about if they have any career aspirations at the current time and prepare to come to the meeting to discuss them and any development needs you have in order to help you achieve your career aspirations. If an employee is currently happy in their current job and are not seeking a career move then this can be documented in the form. **Please refer to Appendix 5.**

Step 2: Performance Development
Planning Meeting (Meeting 1)

The first performance planning meeting is primarily for the line manager and employee to jointly agree and document the performance objectives for performance review period, ensure a shared understanding of Bield’s values in how they are expected to behave in the workplace and to document any development needs and any actions arising from career development discussions.

PDP Form	<p>After the Performance Development planning meeting, the manager will finalise the performance objectives by completing part 1 of the form and any development needs identified during the meeting and provide a copy to the individual ideally within a week of the meeting for their records.</p> <p>Managers are required to record on People Manager that they have conducted the meeting and set a review meeting date. See Appendix 6 for how to record PDP meetings.</p>
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The Performance Development Interim Review Meeting is for the employee and manager to formally review and document progress on the achievement of performance objectives, demonstrating Bield values and completing any development actions. This meeting is usually held half way through the performance review period in October.

In practice, observing and measuring performance is something we need to focus on year-round. It's important that managers and employees provide constructive two-way feedback during informal discussions throughout the performance review period, allowing employees and managers to develop strong working relationships and address areas of concern before they become a problem. So, while completing forms will be important, it's the frequency and quality of the communication that is important.

Preparing for either the interim or final review process is essential - time spent in preparation will normally mean that the meeting you have is shorter and more efficient.

The following questions might to prepare for the meetings.

Performance Objectives:

- Note any changes in priorities, conditions or circumstances since the objectives were set. Remember changes to objectives or inability to meet objectives set last year should not be seen as a failure but should be explained in the form.
- What performance objectives have been achieved/ completed? How can you evidence this?
- What performance objectives are still to be delivered and progress to date?
- What difficulties have been overcome or if unresolved what support is required?

Bield Values and CIH Professional Standards:

- Reflect on interactions with colleagues, customers and stakeholders and identify at least two values and professional standards that have been demonstrated particularly successfully over the last period and areas of development with specific examples.

Development

What learning has been done in the period? How is it being applied in practice?

- If progress is slower than agreed, how can it get back on track?

Step 3 & 4: Interim Review Preparation and Meeting (Meeting 2)

The manager and employee will review progress against meeting objectives, displaying the Bield values and development actions. These sessions are about reflecting on the performance achieved to date and looking ahead at what is still to be achieved in the performance review period.

PDP Form	<p>The employee and manager review together the employees interim performance towards their objectives and record this in part 1 continued section. Also record any development need actions have been completed or progressed.</p> <p>Identify at least two values from the Bield Values Framework (appendix 2) that have been demonstrated successfully over the last period and areas for further development to complete Part 2 of the form.</p> <p>Employees to complete the overall interim review summary comments</p> <p>Managers are required to:</p> <ul style="list-style-type: none"> • provide a copy to the employee ideally within a week of the meeting • record on People Manager that they have conducted the meeting
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Step 4: Performance Development Interim Review (Meeting 3)

The final review meeting is held at the end of the performance review period after the 31 March and ideally no later than May. The meetings follow the same preparation and meeting format as the interim review meeting but are focussed on the last 6 months of the performance review period and the overall achievement of the performance objectives, demonstration of Bield values, development actions/needs and any career development discussion actions.

Please refer to Step 3.

Step 5 & 6: Preparation and Final Review Meeting (Meeting 3)

This is the final meeting to review of progress and achievements over the period, and can be carried out in the same format as the interim review. Throughout the year, your progress will have been monitored, so nothing in this meeting should be new (with the possible but unlikely exceptions of any issues that may have presented themselves since the previous meeting). A final assessment of performance and development will be discussed, agreed and recorded.

PDP Form	<p>Please refer to the PDP Form:</p> <p>The manager and employee meet together to review and document the final year end progress towards the performance objective in the bottom section of Part 1 and if any development need actions have been completed or progressed.</p> <p>In Part 2, identify at least two values and CIH standards that have been demonstrated successfully over the last period and areas for further development.</p> <p>Manager discusses with the employee and completes the overall managers review summary comments</p> <p>Managers are required to:</p> <ul style="list-style-type: none"> • provide a copy of the PDP to the employee ideally within a week of the meeting • record on People Manager that they have conducted the meeting
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Employee & Manager Support & Feedback

The Performance Development (PDP) Forms will be used to set and monitor performance objectives for the next year. There will be structured opportunities for you to provide your feedback throughout the performance and development cycle to ensure the Performance Development Framework is effective and meeting the needs of employees, managers and Bield. Further refinements may be made to the Performance Development Framework based on the feedback we receive.

If you need any support then please contact Training Mailbox Training@bield.co.uk or email HR@bield.co.uk

Please send constructive feedback on the Performance Development Framework, policies, guidance notes and forms to HR@bield.co.uk

Appendix 1: Setting Performance Objectives

Performance development planning sets clear expectations and accountability, ensuring that employees know what is expected of them, what support they will receive and where they can develop. Key characteristics about objectives are that they need to be SMART which is an acronym for:

Specific	Be precise - objectives should be clear, easily understood and leave no room for misunderstanding.
Measurable	Make sure there are measures built in. For example, “to reduce complaints by 20%” is a far stronger objective than just “to reduce complaints”. If you don’t set a specific target, how will you know if it has been reached?
Achievable	The objective has to be within the person’s power to achieve it. If you set someone an objective that they were never going to be able to achieve, they would just get demotivated.
Relevant	Relevant objectives are ones that contribute to the organisation’s goals – it would be demotivating if you can’t see a link between an objective and the organisation’s goal. If not, then you should question whether the objective is relevant.
Timebound	The timebound element refers to a fixed timescale in which the objective should be completed, so that it doesn’t drift on forever.

Some examples of objectives are below.

Not SMART	SMART
Improve customer record keeping	Make sure that all relevant parts of Caresys are completed to 100% accuracy for new customers within X days of them taking up Bield accommodation
Answer telephone calls quickly and politely	Pick up within three rings, respond with a standard greeting “Hello, this is Bield Housing and Care, XXX speaking, how may I help you”

Appendix 2: Bield Values Framework

Bield has six values that outline expectations of how employees are required to behave in the workplace whilst we are meeting our objectives and interacting with each other, our customers and stakeholders. Values are **HOW** we do things. All of the values apply to everyone in the organisation and should be displayed consistently. The Values framework provides more information on the meaning of the value and the positive indicators that would be evident when an employee is displaying the values.

Value	Meaning	Positive Indicators
Caring – We have a passion for supporting and caring for each other	Display kindness and concern for others by being attentive and actively listening.	<ul style="list-style-type: none"> Consider the person and situation and act with sensitivity Be accessible and approachable to others Takes time to listen to others points of view Provides support and encouragement Encourages others to respond positively to difficult situations
Honesty – We are open, fair and just and act with integrity	Display integrity and truthfulness in everything we do	<ul style="list-style-type: none"> Be consistent in words and actions: do what you say you will Communicate honestly, clearly and accurately Provide reasons for decisions to support understanding Ensure colleagues and customers are kept fully informed
Equality & Diversity – We advance equality and celebrate diversity	Treats everyone equally and provides support and opportunities regardless of race, gender, disability, religion or belief, sexual orientation and age.	<ul style="list-style-type: none"> Maintains a fair and open minded stance Encourages a co-operative team ethos Value our differences and using our different strengths and preferences to improve performance and service Challenge behaviour that undermines equality and diversity Demonstrate an understanding of other points of view and suggestion
Dignity – We treat individuals with respect	Values and respects Bield colleagues, customers and stakeholders and maintains composure in times of difficulty.	<ul style="list-style-type: none"> Treating everyone with dignity and respect without exception Respond calmly and constructively under pressure Sensitively use feedback to address issues as they arise Show appreciation for the contribution of others Handle sensitive information in a confidential manner Maintain professional boundaries and confidentiality
Inclusion – We involve our people in what we do because their opinions matter	Ensures all colleagues and customers have a sense of belonging to the organisation.	<ul style="list-style-type: none"> Encourages self and others to share and try new ideas Engages with others in planning and decision making Give feedback and involve others in decisions that impact them Build effective working relationships with colleagues
Ambition – We want to be the best at what we do and we want our people to realise their full potential	Delivers the highest standard for themselves and the organisation and actively seeking and participating in feedback on ways to improve.	<ul style="list-style-type: none"> Delivers the highest standards first time Completes work to agreed standards Actively seeks and participates in feedback on ways to improve Build confidence, self-reliance and competence in others Develop and maintain role and professional competence Identifies and resolve performance issues promptly and constructively
Kindness - We	Develops ways of	<ul style="list-style-type: none"> Develops ways of working which are based on mutual respect,

Value	Meaning	Positive Indicators
understand that kind words and actions make our organisation great	working which are based on mutual respect, openness and compassion.	<p>openness and compassion; way beyond being nice to each other and our customers.</p> <ul style="list-style-type: none"> • Practices the balance of being outspoken and speaking truthfully with kindness • Develops conversations to be more open and sincere to develop deeper relationships • listens without moving to 'fixing'

Appendix 3: CIH Professional Standards

[0472-prof-standards-framework-v2.pdf \(cih.org\)](#)

There is also an eLearning on the standards in academy10 in the Bield content area in Find a course.

Appendix 4: Development Needs

To be able to achieve a performance objective or display Bield’s values or professional standards in their job, an employee might have a development need. Development needs can be met in a variety of ways including but not limited to: reading a policy, procedure or guideline, shadowing a more experienced colleague to observe, attending a training course or obtaining a qualification. When thinking about development needs, the following questions may help focus the discussion and identify an appropriate development solution.

What is the issue you are trying to address?

What has led to this development need (e.g. a change in procedure)?

What do you want to do differently?

How will the solution impact on the issue described in the first question?

Appendix 5: Career Development Discussions

The framework is designed to encourage employees to discuss any career aspirations with their manager for guidance and support. Career development discussions are an optional part of the Performance Development Framework for employees in recognition that many employees are happy in their current role and might not want to change their job role in the foreseeable future. For employees who are meeting their current performance objectives and displaying Bield’s values and the CIH professional standards, it may identify development needs that can develop their skills possibly with a view to applying for a promotion or different job within Bield. Development needs can be met through a variety of ways and may include job shadowing, taking part in project work or taking on additional responsibilities.

Appendix 6: Recording PDP Meetings

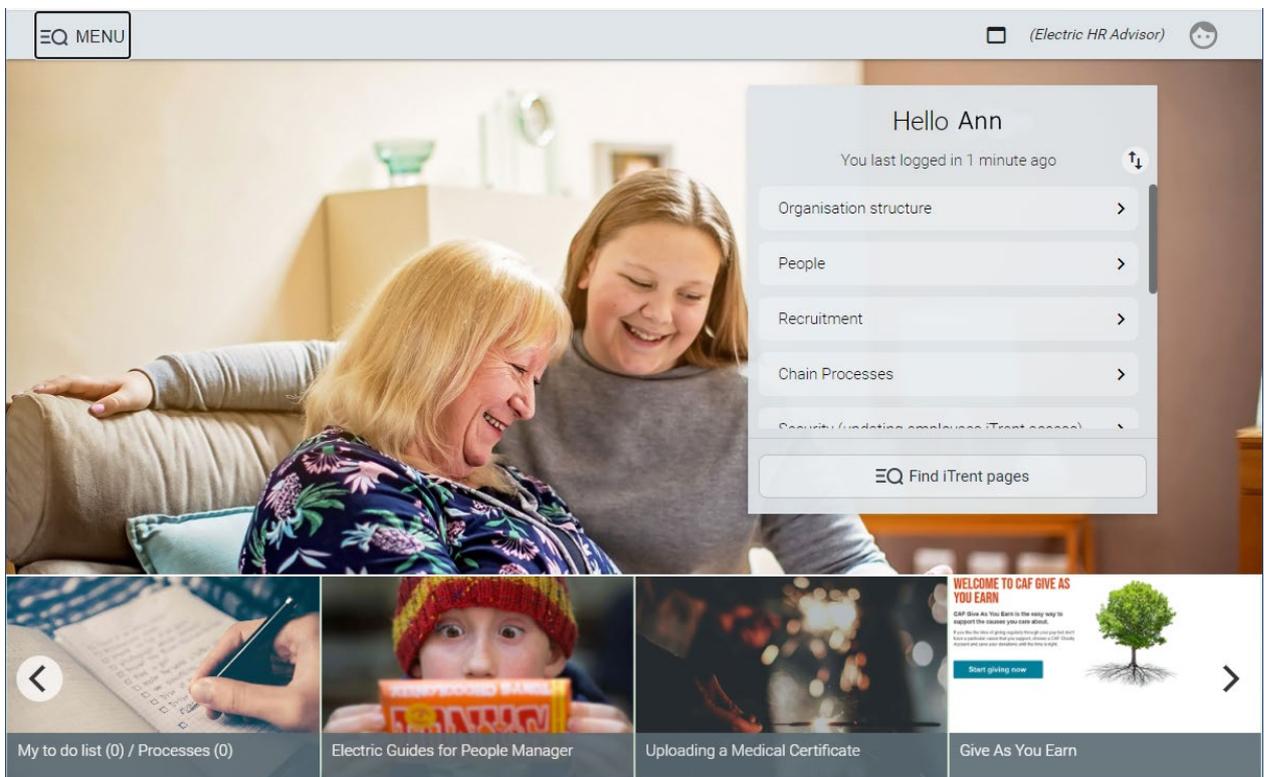
Recording PDP Meetings

It is important that **every employee** is taking part in the performance and development review process and that Bield is able to **measure and report** on the number of employees participating in this process throughout the year.

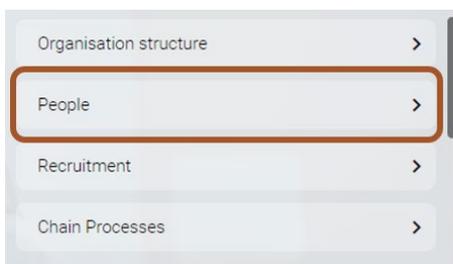
We have developed a simple way for line managers to **record** information about PDP meetings using Bield People Manager and to receive an automated **reminder** when it is time to arrange your next review meeting.

Here is your step by step guide to recording this information:

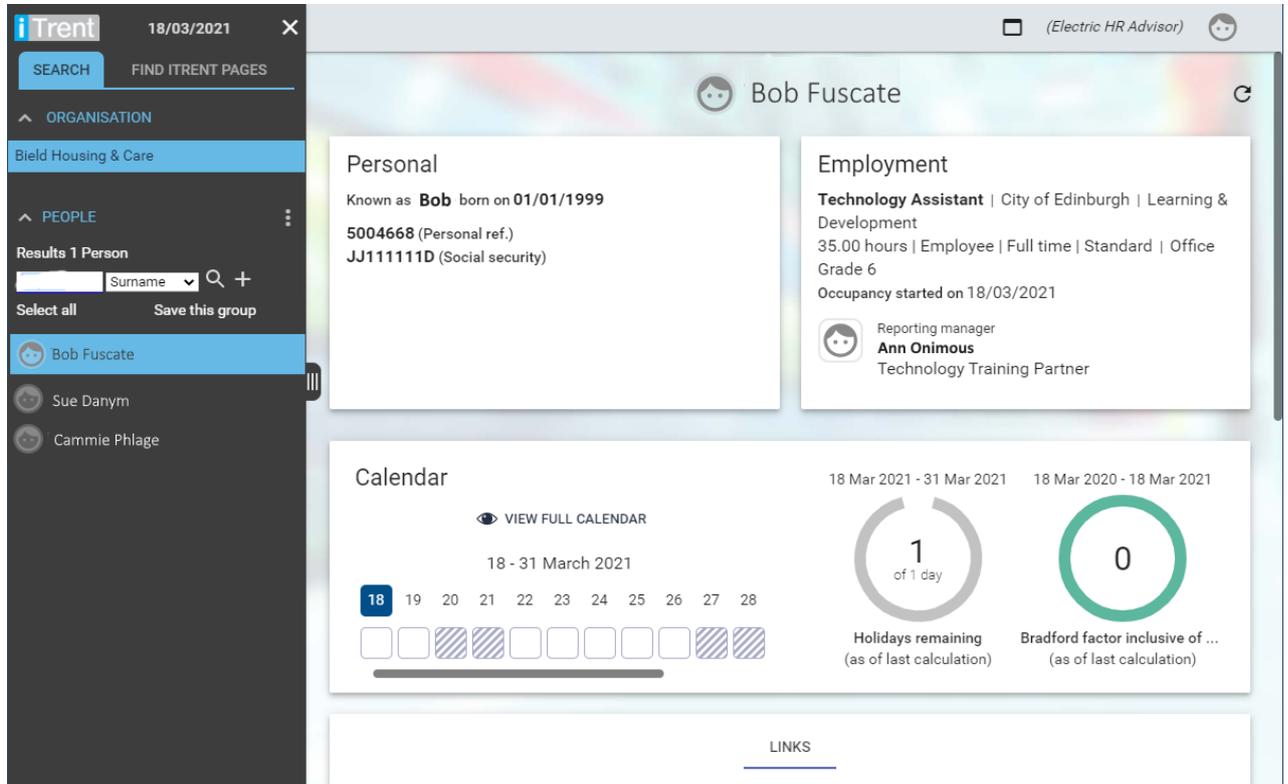
1. Log on to **Bield People Manager** in the usual way and you will arrive on this page.



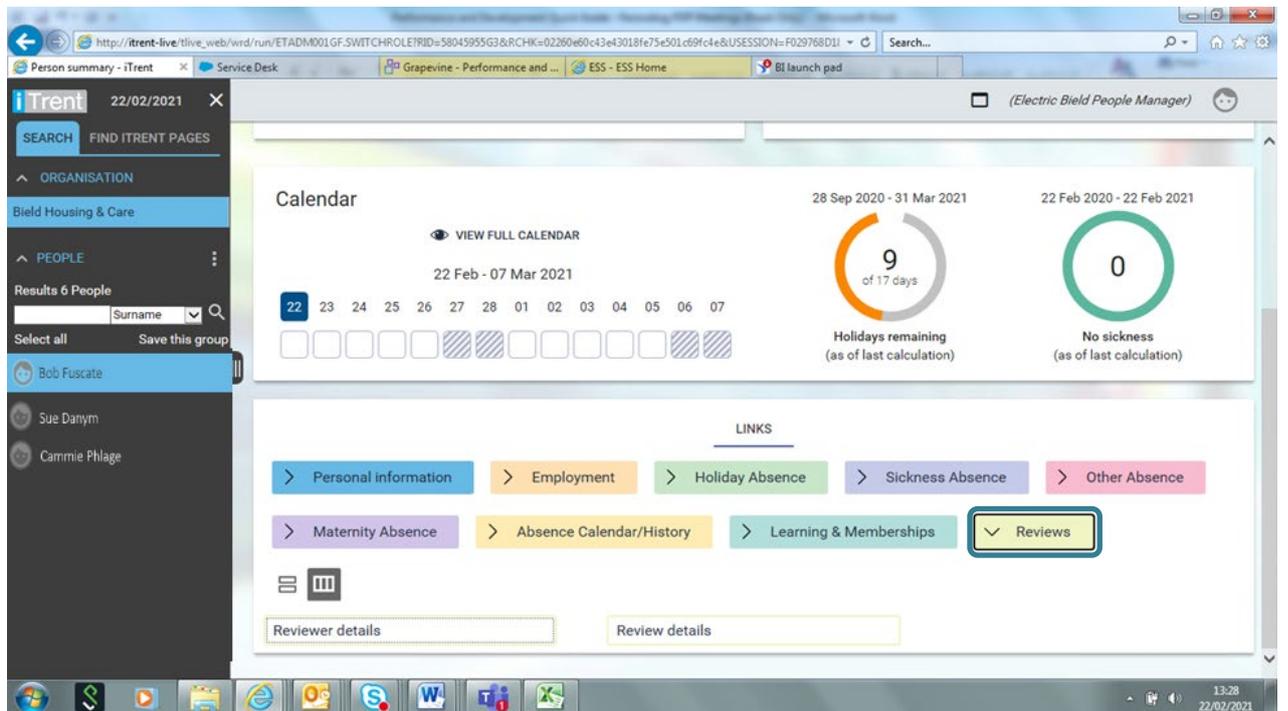
2. Using the menu on the right of the screen select **People** to find your list of direct reports



3. Select the relevant person from the list on the left to take you their home screen.



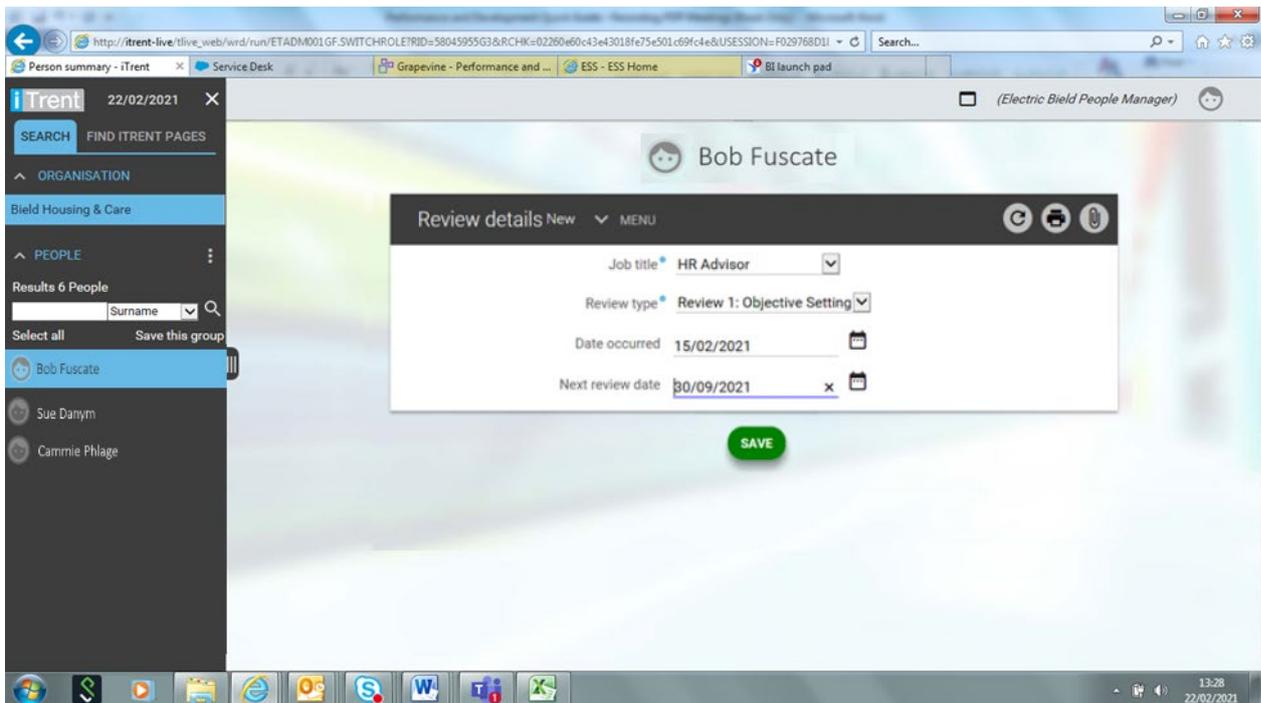
4. Scroll down to the links section and select **Review**



- Then select **Review Details**. If this is the first time that you are completing a review for that person then it will bring up a blank form to complete using the drop down menus.

NOTE: If you have already completed a review for that person – remember to select ‘New’ before completing the form or you will overwrite existing data when you click save. The ‘New’ button will be at the bottom of the form where you can see the save button.

- You are now required to complete the form as shown below

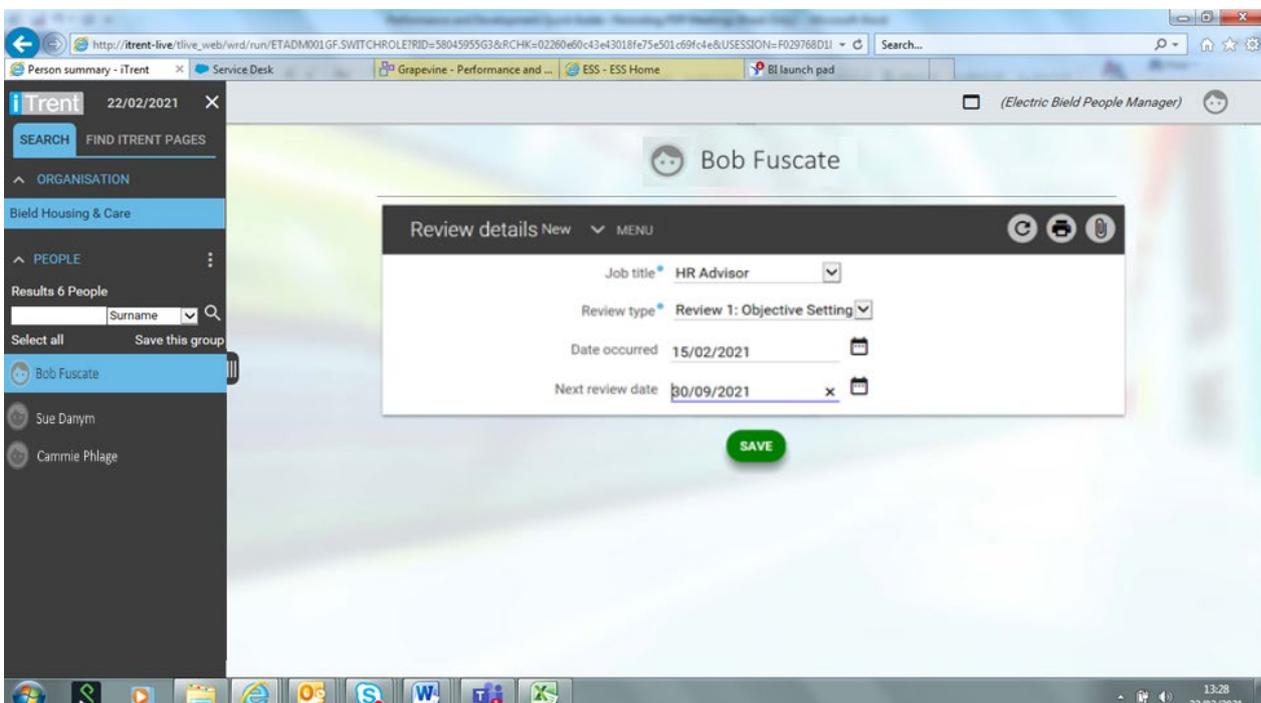


The screenshot shows a web browser window displaying the iTrent system. The main content area shows a profile for Bob Fuscate with a 'Review details' form. The form has the following fields:

- Job title: HR Advisor (dropdown menu)
- Review type: Review 1: Objective Setting (dropdown menu)
- Date occurred: 15/02/2021 (calendar icon)
- Next review date: 30/09/2021 (calendar icon)

A green 'SAVE' button is located at the bottom center of the form. The left sidebar shows the user's navigation menu with 'People' selected, showing a list of names including Bob Fuscate, Sue Danyrn, and Cammie Phlage.

- There should be three **Review Types** recorded at the end of each year.
 - The initial meeting to set **Objectives**;
 - The interim review meeting; and
 - The final review meeting

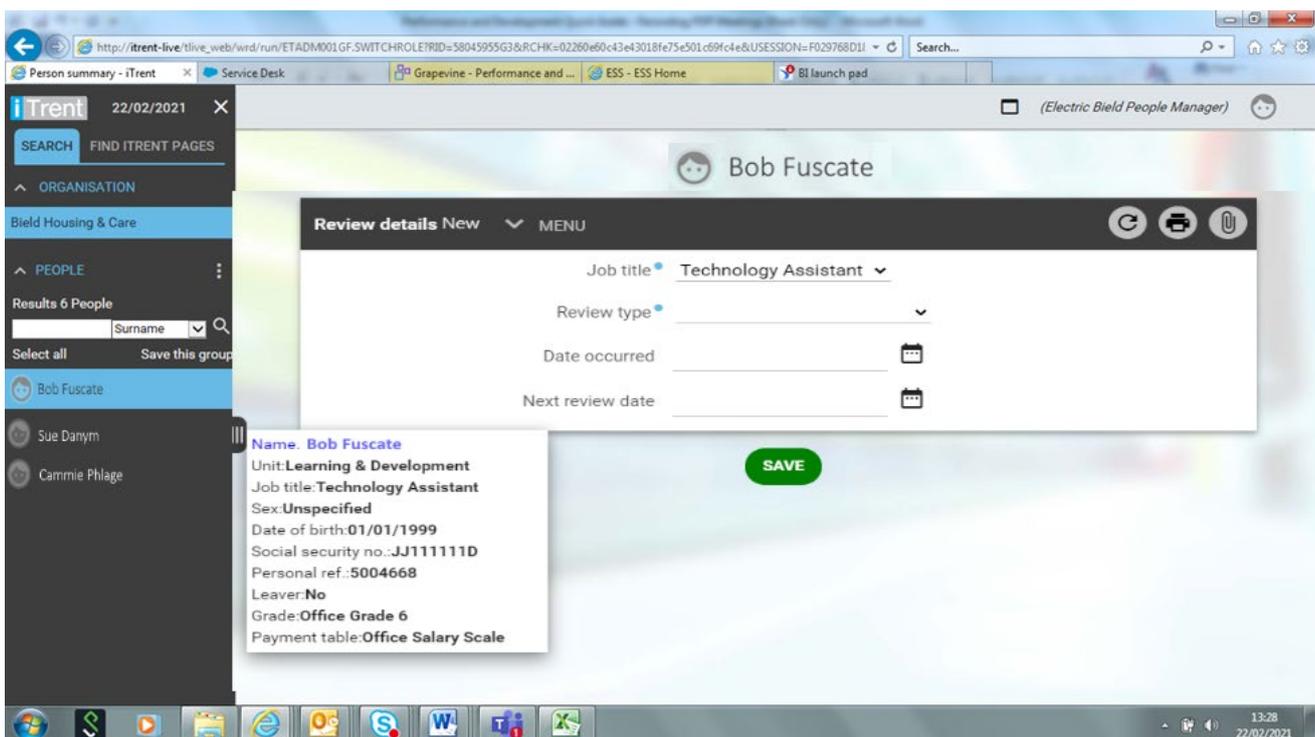


This screenshot is identical to the one above, showing the 'Review details' form for Bob Fuscate in the iTrent system. The form fields and the 'SAVE' button are clearly visible.

8. You can also record the date the Induction process was concluded for new employees.

Handy hint:

If you are completing the process for more than one employee then selecting the next employee on the list (after saving the form) will take you to the form for the new person without going back to the start of the process.



Completing the next review date field means that you and the employee will receive an email to remind you to begin preparation for next week, four weeks before it is due to take place.

Measuring and Monitoring

Bield will report on the number of people participating in the Performance and Development Framework through our Key Performance Indicators and use this information to engage with managers and employees about how we can support the implementation of the framework.