

Performance Review Guide

April 2024



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Introduction

Each financial year ('FY'), we set and agree objectives for everyone within the Company. Some of these may be objectives to be achieved by the end of the year, others to be maintained throughout the year and some may have a completion date during the year. Regardless of the time frame of any objective, it is important that we review performance, so we can:

- Recognise success
- Give constructive feedback and support where an objective is at risk of not being achieved
- Re-set objectives either adding objectives to replace ones which have been completed, or adding or modifying objectives to address new or changed circumstances
- Consider personal development needs and how these can be supported
- Have a clear and open conversation so we understand how our personal views of our performance align with our manager's view of that same performance.

Many of the above purposes are covered throughout day-to-day mechanisms and how we work together, including feedback sessions, coaching sessions, project reviews etc. In addition to this, we want to ensure that everyone has a minimum of two sessions specifically dedicated to review performance against objectives:

- H1 review: after the end of the first half (H1) of the FY
- H2 review: after the end of the second half (H2) of the FY

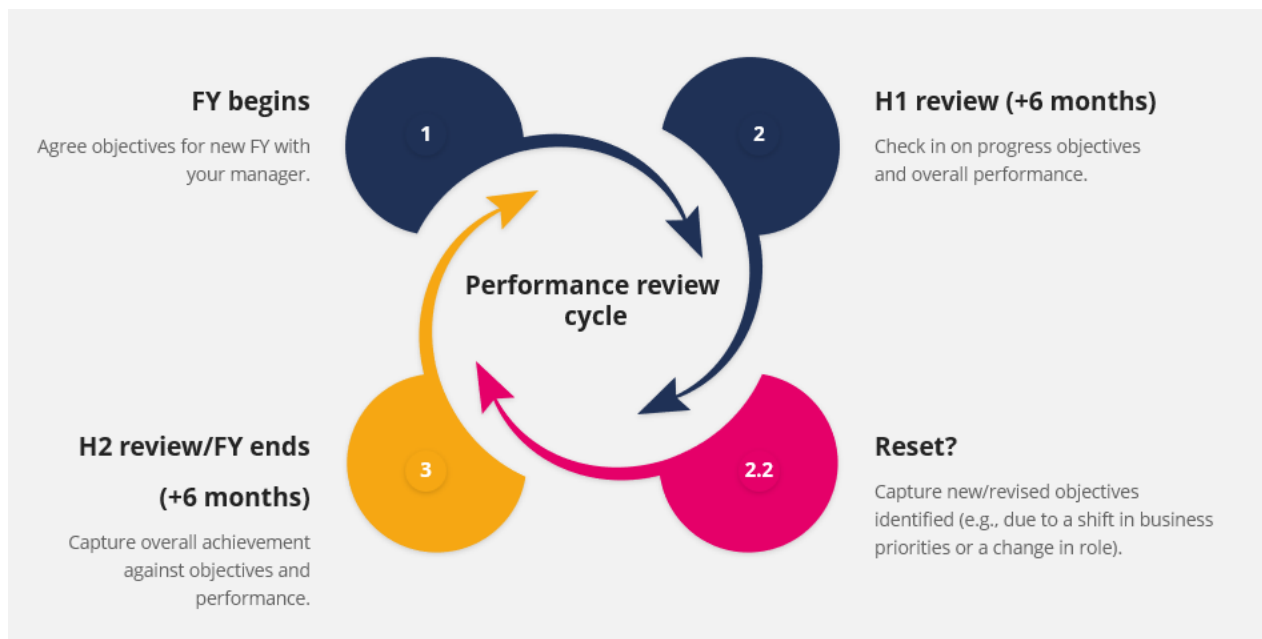
This document describes how we review performance and the main elements which should feature in any review.

Your feedback

As we like to learn from experience and feedback on everything we do, if you have any comments about how we can improve the template and/or related process please send them to the People team.



What's the process?



Create your own version

The process starts with you. Please agree with your manager whether you are using the template provided or an alternative format (for example something already in use in your area for reviewing performance and/or personal development needs). If using the [template](#), create your own version by downloading and saving a copy.

Please use the following naming convention when you create your own version (regardless of which format you decide upon) e.g.,

- Brecht, Alex_FY24 H2 Review
- Brecht, Alex_FY24 Objectives

Populate your document

Update the content. The following notes are based on using the [template](#), but similar principles apply if you are using an alternative format

- Add your objectives into the table (adding more table rows/pages as needed)
- Update your comments against each objective, or group of related objectives, in the 'my comments' column, setting out your view of your performance against each objective or group of objectives at end of H1 and H2
- When considering how well you rate your performance, please think about:
 - the level of your achievement
 - the degree to which you needed assistance to achieve, or were self-sufficient, or were able to support others in achieving their objectives

- whether the way in which you work supports the Company's foundation objectives and is consistent with our culture and values
- If you have something which helps to support your view of your performance, please feel free to include this. The type of supporting information will vary by person, role, and objective, but some examples are the results of a project (on time, under budget), error rates (lower than normal), dates and times (completed on time or early), or perhaps a reference from a client or a colleague or relevant [Heywood Heroes Recognition\(s\)](#).
- Review the objectives to see if any are now obsolete (or complete) and consider what new/replacements could be included for the next 6-month period. Please complete the 'New/revised (only) objectives' section if there are any you wish to propose.
- Consider what your personal development goals are for the next period and what support, encouragement, or assistance you would like from us.

Please try to be as balanced and, at the risk of over-using the term, 'objective', as you can in your assessment. **The purpose of the document is to inform an open and honest discussion with your people manager** on how you are performing, appreciating good or great performance and/or talking through where help or support is needed.

Send to your people manager

Please send your completed document to your people manager – this should be the person who will be reviewing your performance with you.

Ask your people manager to agree a date and time to hold a review meeting with you. Please remember that they will need time to review what you have written and to consider their own view of your performance before the meeting. If you have had a new people manager during the FY, your current manager may need additional time to collate feedback from your previous manager (where appropriate).

Agree if the review should take place in person or remotely, e.g., via Teams. Schedule a time, and make sure you are each in a location where you can talk freely, are free from distractions, and can focus on the conversation.

Participate in your performance review meeting

You and your people manager should make time to jointly review your performance, so that you can:

- discuss each other's views,
- recognise success,
- identify where support may be needed,
- agree any new or revised objectives for the next review period,

- discuss your personal development goals and how they may be supported.

Agree on the updated document

Agree the final version of the updated document, which includes performance commentary from both you and your people manager.

Ideally, you will be aligned on how you have performed. However, there may be occasions when you agree to respect each other's different views. The 'final' version of the document will therefore be when you are both content that your respective views, and the related conversation you have had at your review meeting, are represented clearly and fairly in the document.

If you fail to agree, resolution is via the [grievance policy](#).

Send the completed document to the People team

This is so that:

- we have a central record of the performance conversation (so, if your people manager changes, for example, your new manager can understand what has taken place previously).
- we can identify trends and areas for improvement, for example, training on certain topics for people, a revised approach to objective-setting etc.
- we can ensure that performance reviews have taken place for everyone in good time.
- we are able to review succession plans across the Company.

Your people manager should convert the final agreed version to PDF and then email a copy to you and the People team. This will ensure that all recipients have the same version of the form. The People team will save a copy to your file.