

## Performance and Development Policy

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Policy owner: Leadership & Development, People Experience

## Summary

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This policy details how the BBC's Performance and Development framework will operate and has been agreed with the recognised Trade Unions.

### Who this applies to:

All employees in the UK on Bands A-Fp and forms part of the BBC contract of employment.

## Five key points of this policy

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1. Team Leaders will provide regular feedback to their teams and meet formally twice a year as a minimum.
2. The conversations will be recorded in the myDevelopment system, which may be updated or replaced from time-to-time without altering the principles covered in this policy.
3. Goals will be cascaded down the organisation and Team Leaders will discuss these with their teams in the context of their own goals, divisional objectives and the BBC's objectives.
4. Employees will be required to draft their goals in the context of their job description, team and organisation goals.
5. Employees on a fixed term contract are entitled to feedback on how they are performing in line with this policy.

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## 1. Definitions

The BBC is committed to all employees receiving regular feedback from their Team Leader to enable them to know how they are performing in their role and to consider their personal and career development.

Team Leaders will provide regular feedback discussions with their teams, meeting formally twice a year as a minimum. These two formal conversations allow goals to be set, feedback to be reviewed and career development to be discussed. It is a partnership approach which gives employees more responsibility for their performance and development plans and holds Team Leaders to account for making these conversations happen ensuring they are effective. This framework is called myConversation. myConversation ensures that employees have the opportunity to discuss and record with their Team Leader the contribution their work makes to their personal, team's and department's goals and also to discuss personal and career development matters taking into account:

- Individual and/or team performance in the current job;
- The achievement of goals;
- Personal and career development opportunities and the scope for personal and/or team performance improvement.

The conversations will be recorded in the **myDevelopment** system which may be updated or replaced from time-to-time without altering the principles covered in this policy.

## 2. Principles

- Performance and Development processes ensure that employees have the opportunity to discuss with their Team Leader the contribution their work makes to their personal, team and department goals.
- Processes also enable employees and Team Leaders to discuss their personal and career development plan taking into account:
  - individual and/or team performance in the current job
  - the achievement of goals
  - personal and career development opportunities and the scope for personal and/or team performance improvement
- All feedback discussions, formal or informal, are a two-way conversation, with the employee and Team Leader having the opportunity to discuss the employee's performance and respond to any feedback.

### 3. Performance and Development Framework

#### Goals

Goals are targets for the future, not just day-to-day tasks or activities. The main purpose is to provide a clear and motivating set of targets, focusing attention on the most important elements of the job (or a project) and giving clarity as to what is expected over a specified period. Guidelines for goals are as follows:

- Goals will be cascaded down the organisation. This means that Team Leaders will discuss goals with their team in the context of their own goals, divisional objectives and the BBC's objectives
- Goals will be discussed and set at least once a year or at the beginning of a project, with the opportunity to review them at the mid-year review or before depending on the speed of change. Employees will be required to draft their goals in the context of their job description, team and organisational goals. These will be discussed with the Team Manager and agreed. Employees on Fixed Term Contracts will have their goals at the start of the contract.
- There will be frequent and regular meetings through the year/project to discuss progress and possible barriers to achievement. It will be made clear to employees that the way in which goals are achieved will be appraised as well as what is achieved to reinforce the importance of appropriate behaviours at work
- Team Leaders will ensure, where possible, that the workload is spread as evenly as possible throughout the year (or project/programme) and discuss the support that they can provide in achieving the goals
- Goals will be set in the context of the job description and will take into account the resources and time span available.
- Goals will be written clearly to ensure the employee knows exactly what their objectives are and to enable the Team Leader to review the achievement and provide feedback.
- Career Development goals will focus on the development that an employee needs to enhance their performance on the job or to support them in achieving their career aspirations.
- Where employees spend a significant amount of their working time as part of a team, or can only achieve their goals as members of a team, Team Leaders may set, discuss and review team goals instead of or in addition to individual goals.

### 4. Regular Feedback Discussions

As well as the two formal conversations, Team Leaders and employees will meet informally and regularly to discuss progress towards goals and day-to-day performance. The focus of

the discussion will be the employee's performance and it can be used flexibly to discuss, for example:

- day to day performance and to seek feedback
- how tasks have been performed, not only what has been done
- a difficult task or aspect of the job and to seek advice
- areas where performance could be strengthened
- to raise any concerns about performance
- opportunities for short-term development (including, for example, training, advice and guidance)
- what the Team Leader will do to support the employee
- Both employees and Team Leaders are encouraged to instigate and contribute to these informal discussions and to share responsibility for ensuring a constructive conversation.

## 5. Performance and Development Discussions - myConversation

A formal conversation will happen twice a year at set points linked to the Divisional Performance Review.

Employees on fixed term contracts are entitled to feedback on how they are performing in line with this policy. Team Leaders and employees will set goals at the beginning of the project and review performance at the end of the project or at the formal conversations.

At this meeting achievement against goals, how goals have been met, and general performance within the job are formally reviewed, along with an open and honest discussion about areas for development, aspirations and support required.

With regular, informal discussions during the year (or project) there should be no surprises in the formal conversation or end of project review.

The review discussion will include:

- a review of achievements against goals, if possible by the Team Leader who set them
- a review of performance in the job and how goals were achieved
- actions which could be taken to enhance performance in the job, e.g. training and development, opportunities to take part in projects
- setting goals for the year ahead, for the rest of the project or contract
- a discussion of future areas of work or personal plans.

The Performance and Development process is focused on goals, feedback and career development and is not the forum for discussing pay related matters. If an employee has an issue about their pay this can be raised at any time with their manager or through the submission of a salary appeal following the annual salary review.

## 6. Personal Development Form

The Personal Development form will conform to the following:

- All employees with over six months service will receive two formal conversations a year with their Team Leaders
- For new starters with less than six months service, it is recommended that a formal conversation to set goals happens at the beginning of the contract and a review before the end of their six month probation period.
- For employees on Fixed Term Contracts there will be an end of project/programme review which is documented and which can be used as a 'record of achievement' for any future work in the BBC.
- Adequate notice of the date of the conversation will be given so that Team Leaders and employees have time to think about performance and development over the period and any feedback, issues or questions they may wish to raise;
- All review discussions should take the form of a two-way conversation, with employee having the opportunity to discuss their performance and respond to any feedback. If objectives have not been achieved, then it is important to discuss the reasons why. Account should be taken of factors over which the BBC Performance Management and Personal Development Policy Page 4 of 8 Last Updated 01.04.2017 employee had little or no influence and of objectives which have turned out to be unrealistic. It is equally important to use the opportunity to give positive feedback on objectives successfully achieved. In all cases, feedback should be objective, constructive and be based on specific examples rather than generalisations

The employee and Team Leader will document the two formal conversations in the **MyDevelopment** system.

In cases where, after discussion, the content of the end of year review form is not agreed between the employee and Team Leader, the Team Leader will submit the annual form with both the employee's and Team Leader's content to the HR Service Centre, for retaining on the employee's electronic record.

If an employee refuses to complete the form then the Team Leader may document the conversation on the form and send it to the HR Service Centre for retaining on the employee's personal file.

## Poor Performance

If a Team Leader considers that an employee is not performing to the required level then this will be discussed in the course of regular, informal discussions and the employee given opportunity and encouragement to improve.

If after a reasonable period, the employee fails to reach or maintain the required standards of job performance through a lack of knowledge, skill or ability, the [Capability Policy](#) will be used.

## Individual disagreements

Where there is a dispute between a Team Leader and employee on the content of the formal conversations or goals which cannot be resolved informally, the employee may raise a formal grievance in line with the [Grievance Policy](#).



## Polisi Rheoli Perfformiad a Datblygiad Personol y BBC

*Nodyn: Yn unol â Safonau'r Iaith Gymraeg, mae gennych yr hawl i wneud cŵyn yn y Gymraeg ac i ymateb i gŵyn neu honiad(au) yn ymwneud â chi yn y Gymraeg.*

Mae'r polisi hwn yn gymwys i'r holl gyflogeion yn y BBC. Mae'n rhan o'r contract cyflogaeth sy'n gymwys i gyflogeion y BBC yn y DU ar Raddau 2-11, ac mae'n ddatganiad y cytunwyd arno rhwng y BBC a'r undebau cydnabyddedig ar y cyd na ellir ei amrywio ond drwy negodi ar y cyd yn y Cyd-gyngor Cenedlaethol.

### Diffiniad

Mae'r BBC wedi ymrwymo i sicrhau bod pob cyflogai'n cael adborth cyson gan ei reolwr i'w alluogi i wybod sut y mae'n perfformio yn ei rôl ac i ystyried ei ddatblygiad personol. Mae'r polisi hwn yn egluro sut y bydd fframwaith Rheoli Perfformiad a Datblygiad Personol y BBC yn gweithredu a chytunwyd arno â'r Undebau Llafur cydnabyddedig.

Bydd rheolwyr yn darparu trafodaethau rheolaidd ar adborth gyda'u timau, gan gwrdd bob chwarter blwyddyn o leiaf. Gosodir amcanion bob blwyddyn o leiaf a chynhelir Adolygiad Datblygu Perfformiad i ddarparu mecanwaith adborth dwyffordd ffurfiol.

Mae'r system [myDevelopment](#) yn sicrhau bod cyflogeion yn cael cyfle i drafod a chofnodi gyda'u rheolwr y cyfraniad y mae eu gwaith yn ei roi at gyflawni eu hamcanion personol ac amcanion eu tîm a'u hadran a hefyd i drafod materion sy'n ymwneud â datblygiad personol gan ystyried:

- Perfformiad yr unigolyn a/neu'r tîm drwy'r swydd bresennol;
- Cyflawni amcanion;
- Cyfleoedd datblygiad personol a'r lle i wella perfformiad yr unigolyn a/neu'r tîm.

Gellir diweddarau neu amnewid y system [myDevelopment](#) o bryd i'w gilydd heb newid egwyddorion y polisi hwn.

### Egwyddorion

Mae prosesau Rheoli Perfformiad a Datblygu Personol yn sicrhau bod cyflogeion yn cael cyfle i drafod gyda'u rheolwr y cyfraniad y mae eu gwaith yn ei roi at gyflawni eu hamcanion personol ac amcanion eu tîm a'u hadran.

Mae'r prosesau hefyd yn galluogi cyflogeion a rheolwyr i drafod materion sy'n ymwneud â datblygiad personol gan ystyried:

- perfformiad yr unigolyn a/neu'r tîm drwy'r swydd bresennol
- cyflawni amcanion

- o cyfleoedd datblygiad personol a'r lle i wella perfformiad yr unigolyn a/neu'r tîm.

Bydd yr holl drafodaethau ar adborth, boed yn ffurfiol neu anffurfiol, yn sgwrs ddwyffordd lle bydd cyfle gan y cyflogai a'r rheolwr i drafod perfformiad y cyflogai ac ymateb i unrhyw adborth.

## Fframwaith Rheoli Perfformiad a Datblygiad Personol

### Amcanion

Mae amcanion yn dargedau ar gyfer y dyfodol, nid tasgau neu weithgareddau o ddydd i ddydd yn unig. Y prif bwrpas yw darparu set o dargedau clir ac ysgogiadol, gan ganolbwyntio ar elfennau pwysicaf y swydd (neu brosiect) ac egluro'r disgwyliadau dros gyfnod penodol. Y canllawiau ar gyfer amcanion yw:

- Dylid rhaeadru amcanion i lawr y sefydliad. Mae hyn yn golygu y bydd rheolwyr yn trafod amcanion â staff yng nghyd-destun eu hamcanion eu hunain, amcanion is-adrannol ac amcanion y BBC
- Dylid trafod amcanion a'u gosod o leiaf unwaith y flwyddyn neu ar ddechrau prosiect. Dylid gosod amcanion ar gyfer cyflogeion sydd ar Gontract Cyfnod Penodol ar ddechrau'r contract
- Dylid cynnal cyfarfodydd yn aml a rheolaidd drwy gydol y flwyddyn/prosiect i drafod cynnydd a rhwystrau posibl rhag cyflawni
- Dylid egluro i gyflogeion y bydd y ffordd o gyflawni amcanion yn cael ei gwerthuso yn ogystal â'r hyn a gyflawnir er mwyn ategu pwysigrwydd ymddygiad priodol yn y gwaith
- Bydd rheolwyr yn sicrhau, lle bo modd, fod y llwyth gwaith yn cael ei rannu mor gyfartal â phosibl drwy'r flwyddyn (neu'r prosiect/rhaglen) ac yn trafod y gefnogaeth y gallant ei darparu i gyflawni'r amcanion
- Dylid gosod amcanion yng nghyd-destun y disgrifiad swydd a byddant yn ystyriol o'r adnoddau a'r amser sydd ar gael.
- Dylid geirio amcanion yn glir i sicrhau bod y cyflogai'n gwybod beth yn union yw ei amcanion ac i alluogi'r rheolwr i adolygu cyflawniadau a darparu adborth.
- Dylai amcanion datblygu ganolbwyntio ar y datblygiad y mae ar y cyflogai ei angen i wella ei berfformiad yn y swydd neu i'w gynorthwyo i wireddu ei ddyheadau gyrfa.
- Os yw cyflogeion yn treulio rhan sylweddol o'u horiau gwaith yn rhan o dîm, neu os mai dim ond fel aelod o dîm y gallant gyflawni eu hamcanion, caiff rheolwyr osod, trafod ac adolygu amcanion tîm yn lle neu'n ychwanegol at amcanion i'r unigolyn.

### Trafodaethau Cyson ar Adborth

Ar ôl gosod amcanion, dylai rheolwyr a chyflogeion gwrrdd yn anffurfiol ac yn rheolaidd i drafod cynnydd ar gyflawni'r amcanion a pherfformiad o ddydd i ddydd. Yn ystod y

drafodaeth, canolbwyntir ar berfformiad y cyflogai a gellir ei defnyddio'n hyblyg i drafod, er enghraifft:

- perfformiad o ddydd i ddydd a gofyn am adborth
- sut y mae tasgau wedi'u cyflawni, nid yn unig beth sydd wedi'i wneud
- tasg neu agwedd anodd ar y swydd a gofyn am gyngor
- meysydd lle gellir gwella perfformiad
- mynegi unrhyw bryderon ynghylch perfformiad
- cyfleoedd ar gyfer datblygu tymor byr (gan gynnwys, er enghraifft, hyfforddiant, cyngor ac arweiniad);
- y cymorth y bydd y rheolwr yn ei roi i'r cyflogai.

Anogir cyflogeion a rheolwyr i gychwyn a chyfrannu i'r trafodaethau anffurfiol hyn a rhannu cyfrifoldeb am sicrhau sgwrs adeiladol.

## Adolygiad Datblygu Perfformiad (ADP)

Cynhelir Adolygiad Datblygu Perfformiad (ADP) bob blwyddyn (rhwng Ebrill a Mehefin fel arfer), neu, os yw'n briodol, ar ddiwedd prosiect a dylai gael ei gynnal gan reolwr y cyflogai.

Mae hawl gan gyflogeion sydd ar gontract cyfnod penodol i gael adborth am eu perfformiad yn unol â'r polisi hwn. Fodd bynnag, yn ôl hyd y contract, gall fod yn fwy priodol i'r rheolwr a'r cyflogai osod amcanion ar ddechrau'r prosiect, adolygu perfformiad yn anffurfiol yn ystod y prosiect ac wedyn adolygu perfformiad yn ffurfiol ar ddiwedd y prosiect, yn hytrach na gwneud hyn yn flynyddol. Er mwyn creu ffurflen adolygu y tu allan i'r cyfnod safonol rhwng Ebrill a Mehefin, dylai'r rheolwr gysylltu â'r Ganolfan Gwasanaeth Adnoddau Dynol.

Yn y cyfarfod hwn, cynhelir adolygiad ffurfiol o'r cyflawni ar amcanion, y ffordd o'u cyflawni, a pherfformiad cyffredinol yn y swydd, a bydd trafodaeth agored a gonest am feysydd i'w datblygu, dyheadau a'r gefnogaeth sydd ei hangen.

Drwy gynnal trafodaethau anffurfiol yn rheolaidd drwy'r flwyddyn (neu brosiect), gellir osgoi materion annisgwyl yn yr adolygiad blynyddol neu adolygiad ar ddiwedd prosiect.

Yn y drafodaeth yn ystod yr adolygiad, dylid cynnwys:

- adolygiad o'r cyflawni ar amcanion, gan y rheolwr sydd wedi'u gosod os oes modd
- adolygiad o berfformiad yn y swydd a'r ffordd o gyflawni amcanion
- y camau y gellid eu cymryd i wella perfformiad yn y swydd, e.e. hyfforddi a datblygu, cyfleoedd i gymryd rhan mewn prosiectau
- gosod amcanion ar gyfer y flwyddyn i ddod, neu weddill y prosiect neu gontract
- trafodaeth am feysydd gwaith neu gynlluniau personol yn y dyfodol.

Bydd proses yr ADP yn canolbwyntio ar amcanion, perfformiad personol a materion sy'n ymwneud â datblygiad ac nid yw'n fforwm ar gyfer trafod materion sy'n ymwneud â thâl. Os yw cyflogai'n dymuno codi mater sy'n ymwneud â'i dâl, caiff wneud hynny ar unrhyw adeg drwy gysylltu â'i reolwr neu drwy gyflwyno apêl cyflog ar ôl adolygiad blynyddol o'i gyflog.

## Ffurflen ADP

Dylai'r ffurflen ADP gydymffurfio â'r canlynol:

- Dylai pob cyflogai sydd wedi gwasanaethu am fwy na chwe mis gael Adolygiad Datblygu Perfformiad gyda'i reolwr o leiaf unwaith y flwyddyn. Bydd yn cael ei gynnal rhwng Ebrill a Mehefin fel arfer.
- Yn achos cyflogeion newydd sydd wedi gwasanaethu am lai na chwe mis, argymhellir bod amcanion pontio yn cael eu gosod drwy ddefnyddio'r system MyDevelopment gan bennu dyddiad gorffen a fydd o fewn ei gyfnod prawf o chwe mis.
- Yn achos cyflogeion sydd ar Gontract Cyfnod Penodol, dylid cynnal adolygiad ar ddiwedd y prosiect/rhaglen a gaiff ei gofnodi ac y gellir ei ddefnyddio fel 'cofnod o gyflawniad' ar gyfer unrhyw waith yn y BBC yn y dyfodol;
- Dylid rhoi rhybudd digonol o ddyddiad yr ADP fel y bydd digon o amser gan y rheolwr a'r cyflogai i ystyried perfformiad a datblygiad dros y cyfnod ac unrhyw adborth, materion neu gwestiynau y maent am eu codi;
- Dylai holl drafodaethau'r adolygiad fod ar ffurf sgwrs ddwyffordd lle bydd cyfle gan y cyflogai i drafod ei berfformiad ac ymateb i unrhyw adborth. Os na fydd amcanion wedi'u cyflawni, yna bydd yn bwysig trafod y rhesymau am hynny. Dylid ystyried ffactorau nad oedd gan y cyflogai ddim neu nemor ddim dylanwad drostynt ac amcanion y gwelwyd wedyn eu bod yn anymarferol. Bydd yr un mor bwysig achub ar y cyfle i roi adborth cadarnhaol ar amcanion a gyflawnwyd. Ym mhob achos, dylai'r adborth fod yn wrthrychol, yn adeiladol ac wedi'i seilio ar enghreifftiau penodol yn hytrach na chyffredinoli;

Fel arfer bydd y cyflogai a'r rheolwr yn cofnodi trafodaeth yr ADP ac yn cadw'r ffurflen ADP y cytunwyd arno yn y system MyDevelopment.

Mewn achosion lle nad yw'r cyflogai a'r rheolwr yn cytuno ar gynnwys y ffurflen ar ôl ei drafod, dylai'r rheolwr gyflwyno'r ffurflen gyda chynnwys y cyflogai a chynnwys y rheolwr i'r Ganolfan Gwasanaeth Adnoddau Dynol i'w chadw ar gofnod electronig y cyflogai.

Os bydd cyflogai'n gwrthod llenwi'r ffurflen, yna caiff y rheolwr gofnodi trafodaeth yr ADP ar y ffurflen a'i hanfon i'r Ganolfan Gwasanaeth Adnoddau Dynol i'w chadw ar ffeil bersonol y cyflogai.

## Perfformiad Gwael

Os bydd rheolwr o'r farn nad yw cyflogai'n perfformio ar y lefel ofynnol, yna dylid trafod hyn yn ystod trafodaethau anffurfiol, rheolaidd a rhoi cyfle ac anogaeth i'r cyflogai wella.

Os bydd y cyflogai, ar ôl cyfnod rhesymol, yn methu â chyrraedd neu gynnal y safonau gofynnol ym mherfformiad y swydd drwy ddiffyg gwybodaeth, sgiliau neu allu, yna dylid defnyddio *Polisi Galluogrwydd y BBC*.

## Anghytuno rhwng unigolion

Os ceir anghydfod rhwng rheolwr a chyflogai ynghylch cynnwys ADP neu amcanion na ellir ei ddatrys yn anffurfiol, yna gall y cyflogai wneud cwyn ffurfiol yn unol â *Pholisi Cwynion y BBC*.