

Performance Management Policy

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Performance Management Policy

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Scope and purpose

The purpose of Nudge Education's Performance Management Policy is to align individual employee goals with the organisation's objectives, ultimately driving growth and success. Through this policy, we aim to clearly detail the importance and impact of Performance Management within Nudge Education in achieving our vision and mission

Purpose of the Performance Management Policy

The Performance Management Policy at Nudge Education serves as a guiding framework to empower individuals to reach their full potential, both professionally and personally. It is designed not only to enhance organisational performance and support the growth and development of each employee but to clearly detail Nudge Education's expectations, defining what "good" looks like and managing and supporting underperformance. At Nudge Education, we recognise that our most valuable asset is our people. We believe that by investing in their development and well-being, we can create a workforce that is not only highly skilled and productive but also fulfilled and engaged.

Therefore, the primary purpose of our Performance Management Policy is to facilitate the growth and development of individuals, helping them become the best version of themselves. The Performance Management Process at Nudge Education is designed not only to assess performance but also to inspire, empower, and guide individuals on their journey to success. By maximising potential, empowering individuals, and providing a clear framework for success, we strive to create an environment where every team member can thrive and make a meaningful impact.

Performance Management Review frequency The cadence of review meetings will be monthly and more detail is provided below. There will be 4 Quarterly Review meetings per year and 8 Monthly Review meetings. For clarity, the proposed meeting governance is displayed directly below:

Q1 (September, October, November) Q2 (December, January, February)

Q3 (March, April, May) Q4 (June, July, August)

Performance Management Review details

1. Formal Quarterly Review Meetings

2. Monthly Performance Check In's

3. Weekly Support, well-being and KPI check in's

4. Formal Quarterly Reviews:

- Every staff member at Nudge Education will undergo a formal quarterly review, which serves as a structured assessment of their performance and progress toward their goals.
- During these reviews, employees will have the opportunity to discuss their achievements, challenges, and areas for improvement with their line managers.
- The review template will include sections to evaluate performance against predefined KPIs set by the business, provide feedback on strengths and areas for development, and set new goals for the upcoming quarter.
- These Quarterly Reviews offer staff members a chance to reflect on their performance over a defined period, receive constructive feedback, and align their goals with the organisation's strategic priorities.
- These will typically take place in December (reviewing Q1 performance), March (reviewing Q2 performance), June (reviewing Q3 performance) and September (reviewing Q4 performance)
- We will use validated data throughout the process of the Quarterly Review process

2. Monthly Performance Check In's

- In addition to quarterly reviews, staff members will engage in more frequent monthly catch-ups with their line managers.
- These catch-ups provide a less formal opportunity for employees to check in with their managers, share updates on their work, discuss

any immediate concerns or challenges, and seek guidance or support as needed.

- While the quarterly reviews focus on a broader assessment of performance and goal setting, monthly catch-ups offer a chance for more regular communication and support, helping to address issues in a timely manner and maintain momentum toward achieving objectives.
- As per the Quarterly Review process, we will use validated data during the monthly performance check in

3. Fortnightly KPI and Wellbeing Check In 1:1 meetings

- To ensure we are fully supporting and listening to our workforce, a fortnightly check in should be booked where possible and where relevant with teams and individuals. This can be subject to some flexibility depending on the team and what is agreed with the employee and Line Manager.
- These sessions will be an opportunity to discuss support needs, check in on what is going well and not so well and a chance for Line Managers to ensure staff have support and resources for the months ahead
- Well-being is important to Nudge Education and whilst any time is the right time to raise well-being concerns or challenges, a 1:1 is an opportune moment to do so between employee and Line Manager
- Staff members can also use these sessions to discuss their weekly priorities, seek clarification on tasks or expectations, and receive feedback on their performance in real-time.
- By meeting with their line managers on a regular basis, staff members have regular opportunities to stay aligned with organisational goals, receive guidance and support, and course-correct as needed to ensure optimal performance

Additional Review Governance Post-probation staff members

Performance Reviews will be in sync with academic quarters.

Performance Management for staff members at Nudge Education involves a combination of structured assessments (quarterly reviews), regular check-ins (monthly catch-ups), and ongoing monitoring and support (regular additional sessions with line managers). This multifaceted approach ensures that employees receive the guidance, feedback, and resources they need to excel

in their roles, achieve their goals, and contribute to the overall success of the organisation.

In-probation staff members

Those staff members in their probation period will have their probation managed and reviewed versus the 5 KPIs that underpin the particular role of the employee. It is not expected that a new employee would immediately begin and be expected to achieve their full set of targets and KPIs. With this in mind, agreed and gradually building "Ramp up" targets and measures will be agreed between the staff member and Line Manager. The successful achievement of KPIs will be one of the ways in which probation is measured and evaluated.

Template of the Performance Management document

Annexed to this document is a sample Quarterly Review Template that will support your development and performance. The sections included in the template are:

- **Together We Are:** Invites the employee to reflect on their actions and activities that demonstrate alignment with Nudge Education's values, reinforcing the organisation's culture and ethos.
- **Achievements This Quarter:** Provides a free text space where employees need to highlight their notable accomplishments during the quarter, showcasing their contributions and successes. The free text nature of this section encourages employees to highlight and discuss individual accomplishments they particularly want to raise in the meeting
- **Progress Against KPIs/OKRs:** Allows for an evaluation of the employee's performance against predefined Key Performance Indicators or Objectives and Key Results, helping to track progress toward overarching goals
- **Action and Development Points for Next Quarter:** Facilitates discussion, agreement, and sign-off on specific action items and development goals for the upcoming quarter, ensuring alignment between individual objectives and organisational priorities.

During the Quarterly Review Meeting, both the employee and their line manager will discuss each section of the template, providing feedback, setting goals, and reaching consensus on the next steps for performance improvement and professional development.

Reward, recognition and support

Compensation and Incentives

At Nudge Education, our core mission is to support students who need us the most. We are equally committed to recognising the exceptional efforts of our employees who demonstrate consistent high performance and go above and beyond in their roles. High performance will be recognised, and we will continue to explore ways to offer meaningful incentives as we grow as an organisation.

Recognition Programs

Nudge Education will implement formal recognition programs to celebrate employee achievements and milestones, both individually and as part of teams. This may include awards, certificates, public acknowledgment, and other forms of recognition to highlight exemplary performance and behaviour.

Professional Development

Nudge Education is committed to supporting the ongoing growth and development of its employees. Through training programs, mentorship opportunities, tuition reimbursement, and other initiatives, we encourage continuous learning and skill enhancement to encourage employees to realise their full potential and advance in their careers.

By implementing this comprehensive Performance Management Policy, Nudge Education aims to create a culture of excellence, engagement, and continuous improvement, where employees are empowered to thrive and contribute to the organisation's long-term success.

Support for Underperformance

Where underperformance occurs (1 Quarter of "Red" performance or 2 Quarters of consecutive "Amber" for example), support should and will be provided to employees. Support will be captured in a Performance Improvement Plan, which an employee will work on with support from their line manager.

Process Outline

1 - Introduction of Performance Improvement Plan (PIP)

- Trigger: When an employee's performance continues to fall below expectations. Nudge Education define this as 1 quarter (3 consistent months) of "Red" performance versus KPIs or 2 consecutive quarters (6 months) of "Amber Performance"
- Action: A Performance Improvement Plan (PIP) will be initiated. This plan will:
 - Clearly outline the specific performance issues.
 - Set measurable and achievable goals to look to improve this performance
 - Provide resources and support needed for improvement.
 - Establish a timeline for review (initially set at one month).

2 - First Review of the Performance Improvement Plan (End of Month 1)

- Evaluation: At the end of the first month of an employee being on a PIP, the employee's performance will be reviewed against the agreed actions in the PIP. Outcomes:
 - Met Goals: If the agreed actions and KPIs are met, no further action/escalation is taken, and the employee is commended for their improvement.
 - Unmet Goals: If the KPIs are not met, a "Verbal Warning" may be issued. This warning will: Reinforce the importance of meeting performance expectations. Clarify that continued underperformance will lead to further disciplinary actions. Extend the PIP for an additional month with revised goals if necessary.

3 - Second Review of the Performance Improvement Plan (End of Month 2)

- Evaluation: Performance will be reassessed at the end of the second month. Outcome:
 - Met Goals: If the performance goals are achieved, the PIP will conclude successfully, and no further action is required.
 - Unmet Goals: If performance is still below expectations, a "Written Warning" may be issued. This warning will: Document the ongoing performance issues formally. Highlight the critical nature of the situation. Specify that failure to meet KPIs in the subsequent month could result in termination of employment Continue the PIP for another month

4 - Review After Month 3 of being on the Performance Improvement Plan At the end of the third month of being on the PIP, the final review will be conducted:

- If the agreed actions and KPIs are met: No further action will be taken, and the employee will be considered back on track, the PIP will likely be closed down and the clock will reset
- If the agreed actions and KPIs are not met: the employee will be assessed under Nudge's disciplinary procedure, which may lead to dismissal from their position due to the inability to meet the required performance standards despite the support and opportunities provided.

Right of representation and right of appeal

If it is determined that a Written Warning is necessary as part of ongoing and consistent underperformance, despite supportive measures being put in place, Nudge employees are entitled to the right of representation at any such meeting where this may be issued. If a Written Warning is issued, there is a right to appeal as well.

Summary of policy

This structured approach from Nudge Education ensures that employees are given clear expectations, support, and sufficient time to improve their performance. By following this Process , we aim to foster a fair and transparent environment where employees are held accountable for their performance while being provided with every opportunity to succeed.

Document control

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