

Performance Development Review (PDR)

Guidance for Reviewees - Professional Services Staff

A Performance Development Review is a confidential meeting held at least annually between an individual (reviewee) and their line manager (reviewer). The meeting is an opportunity to focus on you - your performance, your achievements, your challenges and your career development – and for you to get feedback, guidance and support.

The PDR should be part of regular ongoing discussions with your line manager about your performance and development. The difference with this meeting is that enables you to take a step back from what is happening today, to review things holistically over a longer time period and to plan for the coming year. It should also give you a clear “line of sight” between your work, your department’s strategy and the College’s overall priorities.

The purpose of the PDR is to:

- review your performance, providing an opportunity for open two-way discussion
- set performance objectives for the coming year which are linked to the College and departmental objectives
- discuss and review your personal and career development needs, including your career aspirations
- set and review a personal development plan to align with the above.

The PDR process is not an annual “pass or fail” assessment, nor is it linked specifically to pay or promotion. It is a part of an overall picture of your performance and development. Should you be put forward under the College’s Reward and Recognition scheme, it is a requirement that you should have completed a satisfactory Performance Development Review.

PDR documentation is confidential, which means that only those individuals with a legitimate interest may access the completed documents.

These guidance notes go through each section of the PDR form, to help you to prepare for and get the most from your PDR meeting.

Part 1: Review of Last Year

Part 1 of the PDR meeting enables you to reflect on your own performance over the last year, discuss it with your line manager and understand their feedback. To help with this, you are asked to complete a self-appraisal before the meeting using the white sections of the form, and to share this with your reviewer to help them prepare for the meeting.

There is no need for you to write extensive answers to the questions – a brief summary of your views will suffice and these can be expanded on at the discussion with your appraiser.

Question 1.1 asks – how do you feel last year went overall? This question encourages you to take a step back and reflect on your year as a whole. As you answer it, please consider – what went particularly well, and what you are most proud of. Also consider what particular challenges or issues you have encountered and the impact of these.

Question 1.2 asks you to review how you have done specifically against last year's objectives. You will need a copy of your objectives from either your last PDR or your final probation meeting (whichever is most recent). Please remember that objectives do change – if this is the case then please record this on the PDR form and your reviewer will confirm this. Please also note any areas of work you have done that may not have been formally set as objective last year.

Question 1.3 asks you to comment on the learning and development activities you have undertaken in the last year so that you can discuss this with your line manager at your PDR meeting. This can include any form of learning – it need not just be formal training. This will help you to consolidate this learning and discuss what further learning would be beneficial for you in the effective performance of your role.

At your PDR meeting, your reviewer will discuss your work with you, share their feedback and determine assessment of how far you have met your objectives. After the meeting the reviewer will summarise this feedback and record the assessment on the PDR form. This will take account of any factors that have affected your work and situations where objectives have changed due to other circumstances during the year. Should it be necessary, actions will be specified to improve your performance.

Part 2: Objective Setting

Objectives are specific goals for your work, and setting objectives for the coming year is an important part of the PDR process. Objectives should highlight key priorities for you to focus on which are linked to the priorities of your department and the College. Guidance on College priorities for the coming year can be found on the [HR intranet pages](#).

Objective setting requires more than simply repeating the tasks which are listed in your role description. They should highlight key priorities for you to focus on which are linked to the priorities of your department and the College. Your line manager will discuss with you what will be included in your objectives. This could be

- a project that you will lead or assist
- a way of working or process you will develop/improve
- training a colleague in a new area of work
- gaining some experience in an area of work for your career development.

As a guideline it is anticipated that most staff will have between 4-7 objectives each year, depending on the complexity of their job role. How many are appropriate will be agreed between you and your line manager. There may be a number of component parts detailed in one objective.

In setting objectives, it is important for you and your manager to ensure that they are SMART:

Specific	What exactly is the objective? What will it change? What is involved? Who? Where? How?
Measurable	How will we know that it's been achieved? Is it quantifiable and how can we measure it?
Achievable	Is it achievable given the timescales/resources/workload/climate? Are the key factors within the reviewee's control or influence?
Relevant	Is it relevant and a clear priority? How does it fit in to and contribute to the department and the College's priorities?
Timebound	What are the timescales for this objective?

Smart objectives will help you to prioritise your work, monitor progress and celebrate your achievements.

Objective setting should make it clear what is expected of you in the coming year. However, objectives also may change as the year progresses. If this is the case, confirm this in your regular review meetings. At next year's PDR, you can note that this objective was changed by agreement during the course of the year.

Before your PDR meeting please consider what objectives could be included here for you. Your line manager will discuss your objectives with you at your PDR meeting and complete this section afterwards.

Part 3: Career Development

Your PDR will include a discussion about your career development. This is an opportunity for you to share your thinking on your career aspirations and development with your line manager and get their support, feedback and guidance. This conversation can also help to inform both your objective setting and your personal development plan.

It may be that you are not interested in career development specifically at this time, and if this is the case you are encouraged to share this with your line manager in your PDR meeting. If career development is not your goal, then the conversation can move on to how to ensure that the job you are doing is engaging, challenging and enjoyable.

Please consider the two questions in this section before your PDR meeting and share your responses with your appraiser before the meeting, to help them to prepare.

Question 2.1: What are your career goals? Please reflect on this and write your thoughts against this question. You are encouraged to think both in the short term and in the long term, as this will help you to plan any actions you could take now to achieve both. Discussing your career aspirations with your line manager will enable them to find ways to challenge and support you to achieve them.

Question 2.2: What would help you to achieve this? For this question, consider what you need to do to achieve your career goals, and what support might help you. It could be that you do not have a specific goal in mind at the moment and you need to understand what potential opportunities there could be for career development at the College. In this instance, work-shadowing or building your network could help. It could be that you have a much clearer idea of the direction that you want to take and need guidance on how to get there - a mentor could help with this. Or perhaps you need to gain different experience or learn a new skill; in which case consider taking on an objective which includes new pieces of work or a temporary assignment, supported by the right training.

The College also runs Career Development Workshops which can help you to plan your career development. See Appendix 1 of the appraisal form for more information. It should be noted that development resource by the College is intended to develop your performance in post and/or your ability to progress within the College.

Part 4: Personal Development Plan

The personal development plan enables you to plan your learning and development to meet specific learning needs identified through the PDR. Needs can be identified from a number of different sources:

- Feedback from the previous year – development needs as a result of general performance against objectives of the last year
- College requirements – development needs as a result of changes either internally (eg the introduction of new ways of working or procedures) or externally (eg new legislation)
- Objectives set for the coming year – development needs as a result of future priorities and objectives (eg taking on new responsibilities), new skill requirements or interests
- Short term and long term career development aspirations.

Before the meeting, please note down in this section any specific learning needs you would like to discuss, considering specifically the questions posed in the table:

- WHAT would you like to learn, specifically?
- WHY is this important? What benefit will this bring to your role within the College?
- HOW will you do this? Learning happens in many ways and your plan should consider not just formal workshops and courses, but other forms of development too. A potential list of what is on offer at the College can be found in the form's appendix. Alternatively you can visit the [Organisational Development webpages](#).
- What COST is involved and what are the TIME implications?
- WHEN will you do this?

At your PDR you will have a broad discussion about your development, and your personal development plan will be finalised after this discussion. Afterwards, you are primarily responsible for progressing your development plan with the support of your line manager. Please also ensure that you send a copy of Part 4 to Organisational Development– orgdev@rhul.ac.uk - for planning purposes.

Part 5: Comments and Signatures

Once parts 1, 2, 3 and 4 have been completed, both you and your reviewer provide a final comment if required, and then the form should be signed and dated. By signing the form both you and your appraiser are confirming that you agree its content.

The Head of Department should also sign to indicate their acknowledgement of the form and its content.

Part 6: In-Year Review Meetings

It is important to review your objectives and personal development plan on a regular basis throughout the year. This section can be used to keep a record of your review meetings. Progress against specific objectives can be noted, as well as changes to any objectives that happen in the course of the year.