

Performance Development Review (PDR)

Guidance for Reviewers - 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 for you to focus on the performance, achievements, challenges and career development for each member of your team, and for you to give feedback, guidance and support.

The PDR should be part of regular ongoing discussions with each reviewee about their performance and development. The difference with this meeting is that it enables you both to take a step back from day-to-day work, to review things holistically over a longer time period and to plan for the coming year. It should also give the reviewee a clear "line of sight" between their work, the department's strategy and the College's overall priorities.

The purpose of the PDR is therefore to:

- review 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 personal and career development needs, including 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 the reviewee's performance and development. Should the reviewee be put forward under the College's Reward and Recognition scheme then it is a requirement that they 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 PDR meetings with individuals from your team.

Timetable and Process for the PDR Meeting

PDR meetings take place on an annual basis between June and September for every member of staff. PDRs for senior team members within a department normally take place first to allow College and department objectives to be cascaded effectively.

You will need to allow sufficient time to conduct the meeting effectively, and it is advised that you allow up to an hour and a half for each person. Before the PDR meeting, please ensure that the reviewee has downloaded a copy of the form and has completed and the self-appraisal in part 1, the questions on career development (part 3) and has drafted a Personal Development Plan (part 4).

The Organisational Development (OD) team offers training in skills to conduct a PDR meeting – please visit the OD [intranet pages](#) for more information.

Part 1: Review of Last Year

Part 1 of the PDR meeting enables you to reflect on and discuss the reviewee's performance against agreed objectives over the last year. To help with this, reviewees are asked to complete a self-appraisal before the meeting and to share this with you in sufficient time before the meeting to help you to prepare.

As well as this completed self-appraisal, you will also need the following to help you to prepare for the meeting.

- the reviewee's job description,
- the objectives from the previous PDR (if available) or
- their probation report (if appropriate).

With this information, consider before the meeting how well you feel the reviewee has performed against the objectives set last year, their specific achievements and any difficulties they may have experienced.

There are three questions within this section of the PDR form which help to structure this part of the meeting:

Question 1.1 how do you feel last year went overall? This question encourages the reviewee to take a step back and reflect on their year as a whole. They should consider what went particularly well, and what they are most proud of, as well as what could have gone better and the impact of particular challenges or issues they have encountered.

Question 1.2 asks the reviewee to consider and assess how they have done specifically against last year's objectives. When discussing this element please remember that objectives do change – if this is the case then please record this on the PDR form. Any areas of work they have completed that may not have been formally set as objectives last year can also be discussed and noted on the form.

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

Reviewees will outline their responses to these questions beforehand, and you can use the discussion to really understand their perspective and to give your feedback. Before the meeting, take a look at the reviewee's self-appraisal and consider their own assessment of their performance over the last year. Consider what feedback you would like to give them at the meeting and how you will deliver this.

A PDR is very much an open, two-way discussion about performance and development, and parties should have equal time to talk and to listen in the conversation. During the PDR meeting you should encourage the reviewee to expand on their own views expressed in their self-appraisal before giving your feedback. Ensure that when you give feedback that you have practical examples of the performance outcome, whether this is positive or negative. It is important to remember that when giving constructive feedback that both praise and criticism should be both specific in nature and genuine.

At the meeting you should also discuss an assessment of how far each objective has been met (Yes/No/Partially). After the meeting, summarise the discussion and your comments on the individual's performance against objectives in the reviewer's section of the form. Should the reviewee's overall performance not be acceptable, it is important for you to consider the next steps to be taken to improve it. Advice can be provided by your HR Business Partner.

It is important to remember during the meeting, that this element is one of four parts to the PDR meetings. It is important to plan ahead for the next year and discuss individual development.

Part 2: Objective Setting

Objectives are specific goals for an individual's work, and setting objectives for the coming year is an important part of the PDR process. Objectives are more than simply repeating the tasks which are listed on an individual's role description. They should highlight key priorities for them to focus on which are linked to the priorities of your department and the College. Guidance on College Priorities for the coming year is available on the [HR intranet pages](#).

During the meeting you should discuss what will be included in the reviewee's objectives, and so beforehand you should ensure that you are clear on the College's priorities for the year as well as those of your department. Consider what objectives lead from this for the reviewee. For example, objectives might be written for individuals about:

- a project that they will lead or assist
- a way of working or process they will develop/improve
- training a colleague in a new area of work
- gaining some experience in an area of work for their 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 the reviewee. There may be a number of component parts detailed in one objective.

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

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| 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 the work, monitor progress and celebrate achievements. Please ensure that any additional support that has been agreed to help the reviewee to meet the objectives has also been noted.

It is strongly recommended that before ending the meeting you and the reviewee are clear about the responsibilities for follow up action. You should consider when you will review objectives during the year to ensure that they are on target and are still relevant and achievable. If changes need to be made to them then record this in your regular in-year review meetings (see part 6).

Part 3: Career Development

The PDR includes a discussion about the reviewee's career development. This is an opportunity for them to share their thinking on this with you and get your support, feedback and guidance. This conversation can also help to inform both objective setting and personal development planning.

It may be that the reviewee is not interested in career development specifically at this time and there is no expectation that they should be. If this is the case please encourage them to share this with you at the PDR meeting. The conversation can then move on to how to ensure that the job they are doing is engaging, challenging and enjoyable.

As part of their preparation, the reviewee will consider the two questions in this section before the PDR meeting and share their responses with you before the meeting, to help you to prepare.

Question 2.1: What are your career goals? This question encourages the reviewee to think both in the short term and in the long term, as this will help to plan any actions that could be taken now to achieve both. Discussing their career development with you should enable you to find ways to support them to achieve this.

Question 2.2: What would help you to achieve this? For this question, the reviewee will consider what they need to do to develop their career, and what support might help.

There are many options for action which could help support an individual's career development. It could be that the reviewee does not have a specific goal in mind at the moment and needs to understand what potential opportunities there could be for career development at the College. In this instance, work-shadowing or building a network could help. It could be that they have a much clearer idea of the direction that they want to take and need guidance on how to get there - a mentor could help with this. Or perhaps they need to gain different experience or learn a new skill; in which case consider giving them an objective which includes new pieces of work or a temporary assignment, supported by the right training. This conversation gives the opportunity for you to discuss these potential avenues for development.

The College also runs Career Development Workshops to help individuals to plan their career development. See Appendix 1 of the appraisal form for more information. It should be noted that development resourced by the College is intended to improve the reviewee's performance in post and/or develop their ability to progress within the College.

Part 4: Personal Development Plan

The personal development plan enables the reviewee to plan their 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.

Before the meeting, please consider any specific learning needs you would like to discuss with the reviewee. They will also consider their own learning needs, taking into account the questions posed in this section:

- WHAT would they like to learn, specifically?
- WHY is this important? What benefit will this bring to their role within the College?
- HOW will they do this? Learning happens in many ways and the 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 is included 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 they do this?

At the PDR meeting you should have a broad discussion about the reviewee's development, and the personal development plan will be finalised after this discussion. Afterwards, the reviewee is primarily responsible for progressing their development plan with your support.

Part 5: Comments and Signatures

Once parts 1, 2, 3 and 4 have been completed, both you and the reviewee can provide a final comment if required, and then the form should be signed and dated. By signing the form both you and the reviewee 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 really 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.

PDR PROCESS CHART

