

Performance Development Review (PDR)

Guidance for Reviewees - Academic 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 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 apply for academic promotion or be put forward under the College’s Reward and Recognition scheme, it is a requirement that you 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 Objectives

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

To complete your self-appraisal you will need a copy of your objectives from either your last PDR or your final probation meeting (whichever is most recent). The table requires you to group your objectives under the four headings used within the academic promotion:

- Teaching
- Research or Scholarship (for teaching focused staff)
- External Engagement and Impact
- Leadership and Enhancement

A fifth section of “Applied Practice” has been included for staff whose work involves this.

As you complete your self-appraisal, please remember that objectives do change. If it is the case that one or more of your objectives has changed over the year then please record this on the PDR form and your reviewer will confirm this. Please also note any achievements in areas of work which may not have been formally set as objectives last year. There is no need for you to write extensive answers to the questions – a brief summary of your views will suffice and this can be expanded on at the discussion with your reviewer.

At your PDR meeting, your reviewer will discuss your work with you, share his/her feedback and determine an assessment of how far you have met your objectives. After the meeting your 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: 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 reviewer. If career development is not your goal, then the conversation can move on to how to ensure that the work 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 goals with your reviewer will enable them to 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. If your goal is academic promotion, please refer to the [criteria for academic promotion](#) and discuss what your strengths are against these criteria, and where you may have development needs. This can then help to inform both your objective setting and your personal development planning.

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 develop your performance in post and/or your ability to progress within the College.

Part 3: 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 is available on the [HR intranet pages](#).

Objective-setting for academics is grouped into the four criteria for academic promotion, along with a fifth section of "Applied Practice" for staff whose remit includes this. Although objectives are set on an annual basis for the purposes of a PDR, the ultimate objective that you are working towards may take longer than this – for example a specific research project. To help with this, a column is included for you to record the longer term objective, from which you are then asked to identify the specific objective related to this for the next academic year.

As a guideline it is anticipated that most academic staff will have 6-7 objectives each year. How many are appropriate will be agreed between you and your line manager. Your objectives can be spread across the 4/5 criteria, or they can focus specifically on a smaller number, according to what is appropriate for you this year. There may be a number of component parts in one objective.

In setting objectives, it is important for you and your reviewer 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 reviewer will discuss your objectives with you at your PDR meeting and complete this section afterwards.

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, please consider:

- What specifically is the learning and development objective?
- Why is this important? What benefit will this bring to your role at the College?
- What development activity will you undertake to achieve the objective? 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 internally at the College is included in the appendix to the PDR form. Alternatively you can visit the [Organisational Development webpages](#).
- What are the resource implications – cost and time?
- 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.

In-Year Review Meetings

It is important to review your objectives and personal development plan on a regular basis throughout the year. This ensures that progress against specific objectives can be discussed, feedback and support can be given, and changes to any objectives can be noted.