

Performance Development Review (PDR)

Guidance for Reviewers - 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 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 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 Academic Promotion or Reward and Recognition schemes 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 shared with you the self-appraisal in part 1, the questions on career development (part 2) 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 beforehand to enable 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 appraisee's job description,
- the objectives from the previous PDR (if available) or
- their probation report (if appropriate).

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 how well you feel the reviewee has performed against the objectives set last year, their specific achievements and any difficulties they may have experienced. Consider what feedback you would like to give them at the meeting and how you will deliver this. You may be the reviewee's direct line manager or have responsibility delegated to you to manage this process.

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 to each other in the conversation. You should use this first part of the discussion to ask open questions and really understand the reviewee's own perspective on their performance, providing a platform for you also to share your feedback and perspective.

When you give your feedback, ensure that it is balanced, constructive and that you have practical and specific examples of the performance outcome, whether this is positive or negative. Try to ensure that your feedback is objective and focused on the specific behaviour or outcome that you observe, not the person.

When discussing performance at the PDR meeting remember that objectives do change – if this is the case then please record this on the PDR form. Any areas of work the reviewee has completed that may not have been formally set as objectives last year can also be discussed and noted on the form. You should also discuss and agree 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. Should a reviewee's performance not be acceptable, it is important that the reviewer considers next steps 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 meeting. It is important also to plan ahead for next year.

Part 2: 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 their job continues to be 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 challenge and 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. If the reviewee's goal is academic promotion, please encourage them to refer to the [criteria for academic promotion](#). At the PDR meeting you should discuss their strengths against these criteria, and where they may have development needs. This can then help to inform both objective setting and 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 improve the reviewee's performance in post and/or develop their ability to progress within the College.

Part 3: 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 focus which are linked to the priorities of the 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 the reviewee is working towards may take longer than this – for example a specific research project. To help with this, a column is included to record the longer term objective, from which the specific objective for the next academic year can be identified.

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. The objectives can be spread across the 4/5 criteria, or they can focus specifically on a smaller number of criteria, according to what is appropriate for the reviewee this year. There may be a number of component parts in one objective.

In setting objectives, it is important for you 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 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.

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 and development objectives:

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

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.

In-Year Review Meetings

It is really important to review the 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.

PDR Process Chart

