

PERFORMANCE AND DEVELOPMENT REVIEWS (PDRs)

PURPOSE AND FORMAT

A PDR has a number of purposes. It enables staff and their managers to:

- reflect on the previous year
- discuss and set objectives for the forthcoming year
- evaluate learning and development undertaken during the previous year
- establish development needs for the future
- consider longer term development and career aspirations

The attached form provides an outline for the PDR discussion. Members of staff should complete Sections 1 and 2 and give it to their manager at least a week before the discussion.

The PDR should follow on logically from one to one discussions on performance and development, which have taken place throughout the year. The PDR discussion is not the place to raise performance issues which should have been dealt with during the course of the year.

A personal development plan (PDP) should be completed by the member of staff following the PDR; this should then be agreed with their manager.

An agreed record of the PDR should be kept by both parties who should review progress against PDRs/PDPs at regular intervals during the course of the year

Managers and their staff are invited to discuss how development needs might be met with the SDU; a range of possible modes of delivery means that formal courses are only one of a number of potential options.

TIMETABLE

Heads of Division/Departmental Managers are responsible for establishing a timetable for PDRs in their own areas. The HR Director will confirm the timetable for each area with Heads of Division/Departmental Managers

It is the responsibility of Heads of Division/Departmental Managers to ensure that PDRs are carried out in accordance with this timetable. It is recommended that Heads of Division/Departmental Managers (and other senior managers where appropriate) review the PDR summaries of all staff so that they can monitor that discussions have taken place and what has been agreed.

Heads of Division/Departmental Managers are also responsible for collating development needs established at the time of PDRs and relaying those to colleagues in the SDU.

PERFORMANCE AND DEVELOPMENT REVIEW (PDR)

This form is aimed to facilitate a discussion between you and your manager. The discussion should concentrate on your achievements over the preceding year and establish objectives and associated development activities for the year ahead. It is also an opportunity to discuss longer term career aspirations.

SECTION 1

1. Identify your objectives for the previous year and summarise what you see as your main area of contribution towards achievement of Divisional/Departmental/School objectives

2. Evaluate your performance. You may wish to do this by outlining what you have accomplished during the previous year. Alternatively you may wish to take the HERA competencies as a starting point, and give examples of what you have achieved. You are encouraged to consider areas/activities where you think your performance could be improved.

3. If you are a manager, please self-assess using the questionnaire in the KSB (Knowledge, Skills and Behaviour) guidelines and outline the outcome of your assessment below. If you have participated in 360 degree appraisal, please indicate the main findings of the report and how you are taking them forward.

4. Consider how learning and development opportunities undertaken during the year have helped you achieve your objectives

SECTION 2

5. Formulate objectives for year to come (which should be confirmed during the PDR discussion). Objectives should be linked to team plans and divisional SDPs/ DDPs.

6. Establish learning/development requirements in relation to forthcoming objectives.

7. Think ahead about longer term career goals and what help you might need to achieve them.

SECTION 3

Summary of discussion including agreed objectives for forthcoming year to be completed by the manager after the meeting has taken place. Both parties should agree that it is correct, by signing and dating the summary.

ACTION FOLLOWING PDR:

Managers: Complete summary of discussion. Collate development needs information and pass to HODS

Members of staff: complete Personal Development Plan

Both: Agree summary of discussion and content of Personal Development Plan. Discuss progress against objectives and associated development at regular intervals during the course of the year.