

Staff Performance and Development Review (PDR) – Guidance Notes

Overview

These notes provide an overview of the University's new '*Performance and Development Review*' (PDR) process. It plays an important role in supporting staff to give their best at work and to see how their contributions can make a difference to the success of the University. Great conversations are at the heart of the PDR process – recognising when people achieve success, giving honest and constructive feedback where something can be improved, and offering appropriate support and development.

Purpose

The purpose of the PDR process is to:

- Ensure that individual achievements are recognised and celebrated
- Provide a constructive environment to discuss work priorities
- Establish what support is required to achieve work priorities
- Discuss any development needs for both the current role and for future career opportunities

Scope

The PDR will be carried out by a 'reviewing manager', who is typically the individual's direct line manager. All staff should have a PDR annually and these will usually take place between May and October, or at a time to fit with Institute or Unit operational requirements. The PDR is a collaborative activity with senior managers, line managers and staff members all having a responsibility for making the PDR process successful.

Forms

There is one form (Appendix 1) to complete as a summary record of the PDR conversation. This document also acts as a '*Working Action and Development Plan*' which can be referred to during the course of the review period.

Support

To supplement these guidance notes, a PDR page has been set up on Moodle which contains useful resources for staff and managers. To access this page please click [here](#), sign in to Moodle using your normal IT log-in/password and enter the enrolment key **UWTSDPDR**. You only need to enter the enrolment key the first time you access the page. Training for staff will also be made available to help enable effective performance and development conversations. Please contact staff.development@uwtsd.ac.uk for details.

Guidance for Staff (Reviewee)

Preparing for your PDR meeting

You will need to review the PDR form in Appendix 1. This document forms the basis of the conversation that you will have with your manager at the PDR meeting.

There are two sections:

Section A: Looking Back – this section looks at your achievements, performance and learning over the previous review period. When reviewing this section and preparing for your PDR conversation, you may find it useful to reflect on some of the following:

- What have been your main achievements?
- How did you perform against the objectives or priorities set in your previous PDR?
- What contribution have you made to your team or the wider University (if appropriate)?
- What went well and what could have been done differently?
- What do you consider to be your strengths and how have you been able to use these in your role?
- What learning, development or training have you undertaken and what has been the impact?
- What feedback do you want to give to your line manager on their support and approach?

When thinking about your performance and development, it would be helpful to base your assessment on evidence. Here are some examples:

- Outputs you delivered
- Activity profiles
- Student, customer or colleague feedback
- Peer observations
- Financial results
- Learning, teaching and/or research outcomes, including impact
- Efficiency gains or improvements for the work of your team

Section B: Looking Forward – this section looks at work, performance and development priorities for the next review period. In preparing for your PDR conversation, you may find it helpful to consider some of the following:

- Do you have any ideas or suggestions about your work priorities for the next review period?
- Do you have more than one person setting your workload? If yes, what impact could this have on your priorities?
- Is there capacity to take on new tasks, activities or projects?
- Are you aware of any support you might need?
- Are you aware of any barriers which could impact timescales or progress?
- Would you like to progress further in your current area? Are there other areas of work at the University you have a particular interest in and would like to become more involved with? How could this be achieved?
- What skills, knowledge or experience do you need to progress further? What support do you need from your manager?

After the PDR Meeting

Either you or the reviewing manager should complete (within 10 working days) the PDR form which provides a summary of your conversation. You are both required to sign the form and keep a copy for your records.

Guidance for the Reviewing Manager

Before holding your PDR meetings with staff, seek clarification from your Head of Institute/Unit on the goals and priorities for the new review period. It is good practice to share these with staff at their PDR meetings so they see how their role fits in with the wider work of the team and University. You should also review the PDR form in Appendix 1 which will provide the basis and structure of your PDR conversations. Remember, it is the quality of the conversation that you have with individuals that is important, therefore good preparation before every meeting is essential.

Preparing for the PDR meeting

Agree a date for the PDR meeting with individual staff members, giving you and them a reasonable amount of time to prepare and provide a copy of this guidance, including the form in Appendix 1.

Tips for carrying out effective PDR conversations

- Allocate between 1 – 2 hours for the meeting. Consider environmental factors - the location should be suitable for a confidential conversation, free from distractions and interruptions
- Prepare by reviewing the individual's previous PDR and consider how successful the staff member has been in achieving priorities and objectives. Take into account any change in circumstances
- Prepare how you will position feedback. Feedback should balance positive recognition and constructive comment about how to improve or enhance performance and should be evidence based
- There should be no surprises. Any concerns about performance should be raised at the time with the aim of supporting an improvement
- Prepare to discuss priorities for the coming review period, reflecting on the individual's role and their strengths
- During the meeting listen carefully to what the staff member is saying, adding further points from your own preparation
- When identifying learning and development needs, remember that this involves much more than attending training courses or academic programmes of study. Consider a full range of development options; such as coaching, mentoring, job shadowing, researching best practice, undertaking a project, delivering a presentation, attending a strategic meeting etc.
- All development must be aimed at improving performance. This might include helping an employee to do their current job better or by preparing them to do a different job in the future. Academic staff should have a development priority that relates to their learning and teaching

After the PDR meeting

- Either you or the staff member should complete the PDR form within 10 working days of the PDR meeting taking place. Both should sign and retain a copy for your records.
- Share relevant themes or development needs arising from the conversations with your Head of Institute/Unit.
- Section B - '*Working Action and Development Plan*' is a live document and progress in delivering the priorities should be discussed with the staff member on a regular basis. It is recommended that a brief 'check-in' review takes place at 6 months into the review period.
- Follow up on any commitments made, for example confirming the outcome of funded staff development requests.