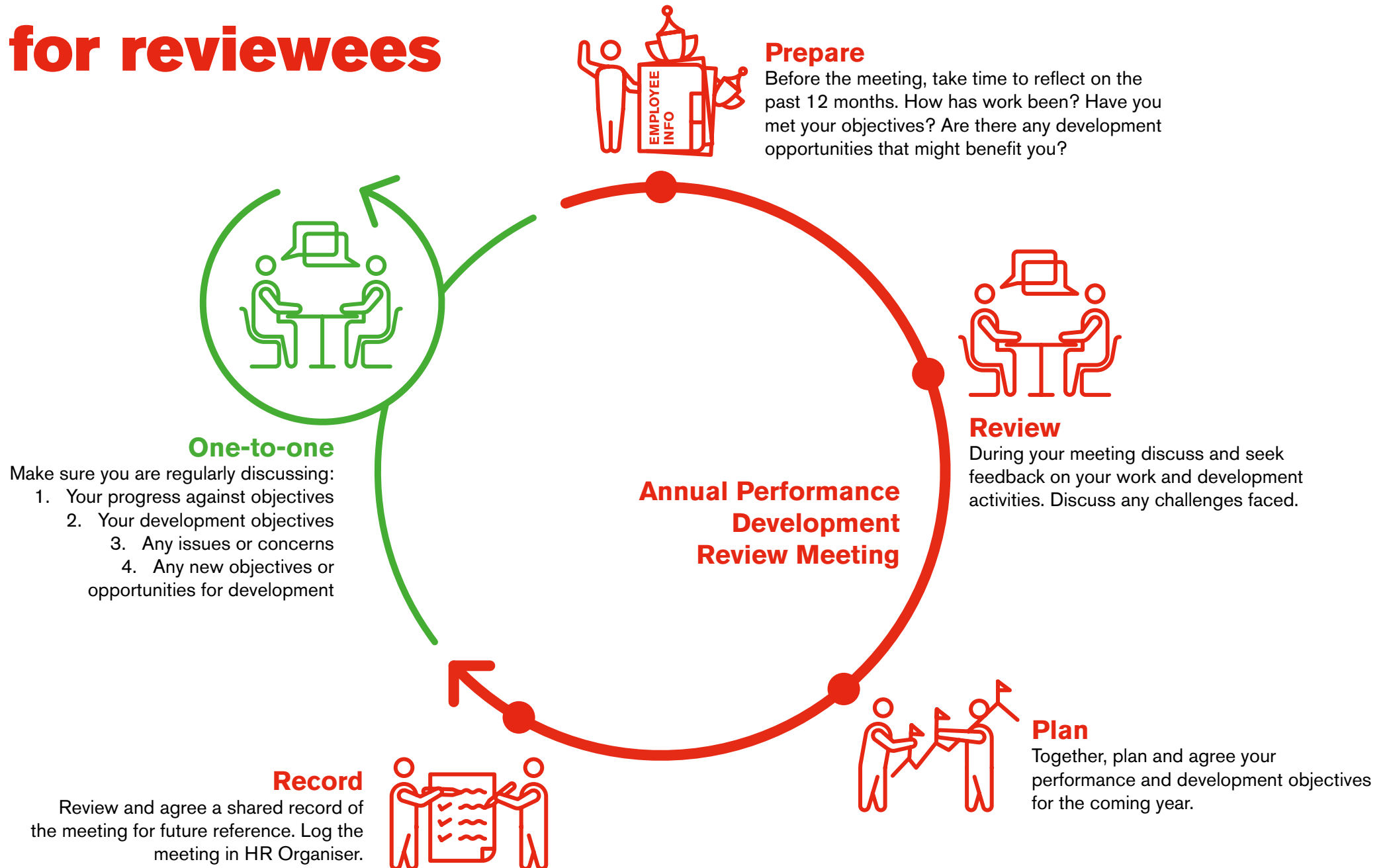




# **PDR guidance for reviewees**

# PDR flowchart for reviewees



---

# **The annual PDR meeting: step-by-step guidance for reviewees**

---

This step-by-step PDR guidance will help to ensure that the annual PDR meeting runs smoothly and effectively. It has four clear stages - prepare, review, plan and record.

## **Arranging the meeting**

Your reviewer will arrange a time and location for your PDR meeting and send you any preparatory documentation in advance. Where you meet should allow for a confidential conversation that is free from interruptions.

# Step 1. Prepare

## Before your meeting take time to reflect on your year.

Preparing for your PDR meeting is important, as doing so will help you to get the most out of the discussion. Before you meet think about areas such as your achievements and progress over the last 12 months, ideas for new objectives and your development needs. Make sure to gather information that will support the discussion. This could be examples of work you have carried out or feedback provided by others within and outside the department. You may wish to make some notes and take these into the meeting.

### Remember:

- Revisit your PDR notes from the last recorded meeting and make sure you are aware of the objectives and development plan that you agreed.
- Look back at notes from the regular one-to-one conversations throughout the year. See if there are areas to revisit as part of the discussion.

- Think about: what has gone well; what could have been better; your progress against objectives; your development needs and ideas for objectives for the coming year.
- Gather feedback from others (if possible). E.g. you may wish to refer to positive feedback you have received or examples of how you have acted on feedback from others.

## Step 2. Review

### Review your performance and development with your reviewer

The PDR meeting is an opportunity to reflect openly with your reviewer on what has gone well over the last 12 months. Use this time as an opportunity to discuss and gain feedback on your achievements and contribution.

As well as celebrating success, it is important to identify and discuss and share thoughts any areas where challenges have been encountered and objectives not met to inform any planning for the coming year.

The meeting is also chance to review and reflect on your professional development activities during the last 12 months. Areas to discuss might include developing skills, knowledge and experience, any professional recognition gained, new networks, or coaching / mentoring you have undertaken.

### Remember:

- That the PDR meeting is one part of an ongoing relationship and there should be no surprises in the conversation.
- Talk fully about your achievements, contributions, professional development and approach to work over the last 12 months using examples where appropriate.
- Reflect on what could have gone better. Have you faced any barriers inside or outside of work that may have impacted on your performance, and if so, what could be done to improve this?

# Step 3. Plan

## Plan and agree your future performance and development objectives.

Having reviewed the previous year, the next step is to plan for the coming twelve months and agree your performance and development objectives. This will form a significant proportion of the meeting.

Your objectives will be related to departmental objectives and priorities, allowing you to see how you are contributing to the overall success of the team, department and university.

Ideally, objectives should be agreed by you and your reviewer.

### Performance objectives

Your performance objectives are related to the specific duties or tasks relating to your role. Objectives should be clear and appropriately stretching. The SMART model can help with ensuring that your objectives are attainable and clear.

### Development objectives

Development activities are about helping you to achieve your performance objectives. This is an opportunity to discuss and agree any developmental support you would welcome in the next 12 months. Work together with your reviewer to agree

your development plan and use it to support your growth and competence in your role, increase your contribution and support your progression (if desired).

### Remember:

- Development can be much more than simply attending training courses. There are many other opportunities you can explore, including: mentoring; coaching; job shadowing; variations on current work; on-line learning; personal development courses and peer learning.

There may be occasions where it is not possible to accommodate your specific development requests. In this situation, discuss the situation and seek to find alternatives where possible.

# Step 4. Record

## Record your discussion and follow up

Within 2 weeks of the meeting:

Make sure you confirm the date that the PDR discussion took place. This can be done in the Forms and Feedback section of [HR Organiser](#).

Ensure with your reviewer that you both have a record of your agreed objectives and future development needs to work to throughout the year. Remember, it is up to you to seek out and take advantage of the development activities that have been agreed. If you are using the standard form, you and your reviewer should complete the [PDR Record form](#) and keep a copy to refer to.

## Remember:

- The value of the PDR is in maintaining the conversation about its contents and objectives throughout the year. Use these regular one to ones to monitor progress against objectives, gain feedback and identify opportunities for development and improvement.