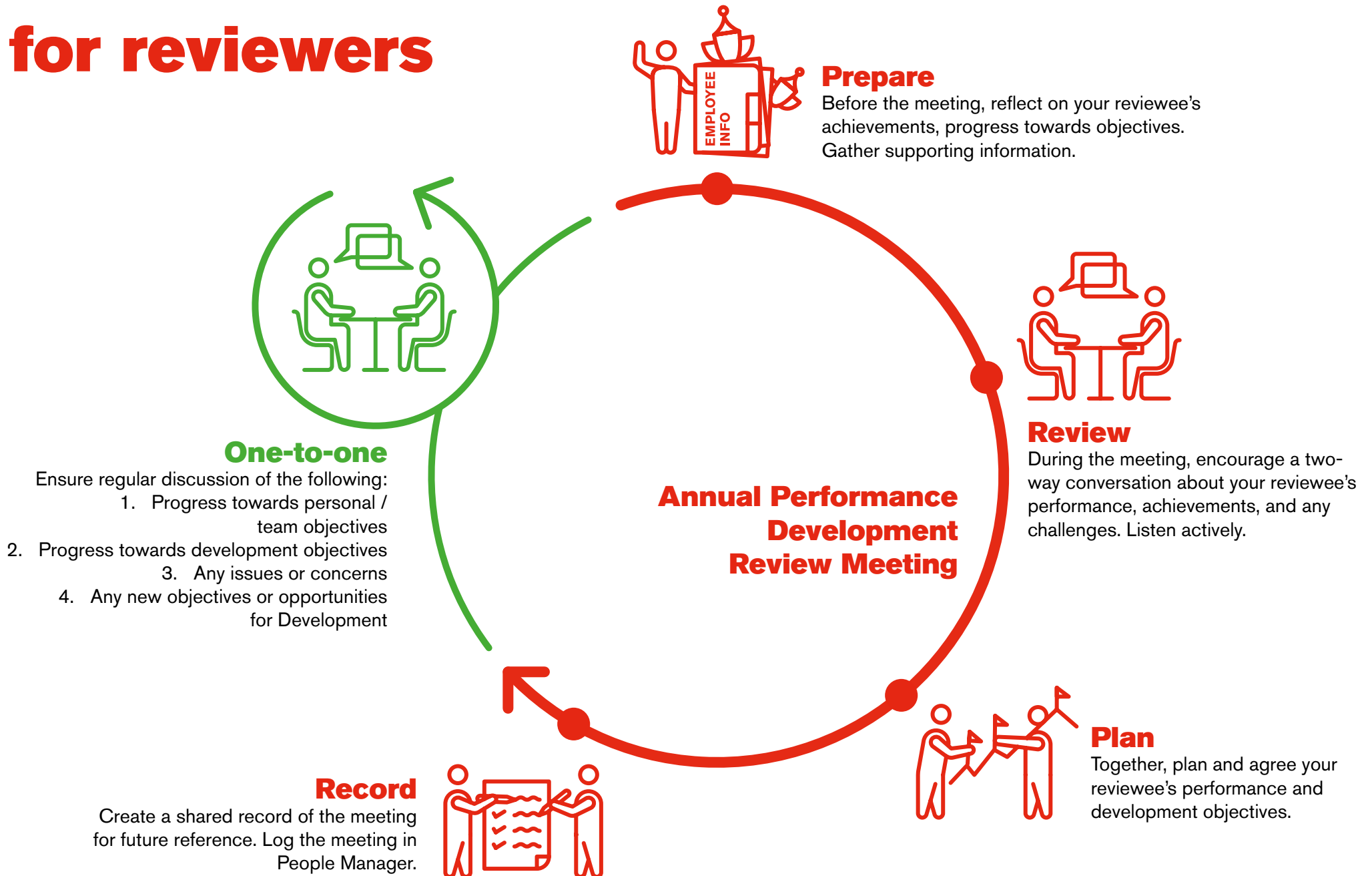




# **PDR guidance for reviewers**

# PDR flowchart for reviewers



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# **The annual PDR meeting – step-by-step guidance for reviewers**

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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.

# Step 1. Prepare

## Prepare for the meeting

As the person conducting the review, it is your responsibility to arrange the PDR meeting. Aim to give at least two weeks' notice and make sure to set aside a suitable length of time for the conversation. Plan to meet in a location that is welcoming, not overly formal, reduces the likelihood of interruptions and allows for a confidential conversation.

To get the best from the discussion, before you meet, ask your reviewee to consider their achievements and contribution in the last year, ideas for future objectives and development needs. You may wish to include a link to this standard PDR form with your meeting invitation.

Your own preparation for the annual PDR meeting is key to ensuring that this is a valuable exercise for all parties. Make sure to gather information that will support the discussion and inform decisions. This might include examples of work your reviewee has carried out, their achievements, and any feedback provided by others within and outside the department.

Is it also important to consider your approach to the meeting and how you can ensure an open and honest discussion. There are various [resources available](#) on subjects such as coaching and career conversations, asking open questions

that will support you in encouraging your reviewee to talk more freely and, in more detail.

Do not use the PDR meeting as a forum to address any new performance concerns. There should be no surprises in the meeting. Refer to the guidance on managing poor performance as soon as any issues arise.

## Don't forget

- Revisit notes from the last PDR meeting. Make sure you are aware of the objectives and development plans agreed.
- Look back at notes from the regular one-to-one conversations to understand progress over the year.
- Review projects completed, reports, data, metrics, etc.
- Review any learning and development activities undertaken and consider the impact of these.
- Plan to have an open, honest conversation that ensures your reviewee's views are heard.
- Once set, do not move the meeting.

# Step 2. Review

## Review performance and development since previous PDR

Starting the meeting, make sure to explain the structure of the conversation, how long it will last, and how outcomes will be recorded. Emphasise that the meeting is an opportunity for an open discussion on how things are going and to plan for the future.

Ask your reviewee how they feel things have gone for them in their role over the previous year. Encourage them to reflect on their achievements, contribution and any challenges.

Give your view on how you think things have gone over the past 12 months. Give examples of things you've seen, for example, objectives they have achieved, where they may have role-modelled behaviours, responded to challenges, or worked collaboratively.

Ask your reviewee about their professional development during the last 12 months, for example, talk about areas they have strengthened, any professional recognition, developing networks, or coaching / mentoring undertaken.

Ask them for feedback on you in your role, the support you have provided and suggestions for how you can work together well in the future.

### Don't forget:

- Have an open conversation. Ask open questions, listen actively to the views, experiences and aspirations of your reviewee.
- Maintain an open mind throughout the conversation. Your reviewee may well share information that challenges your initial assumptions of their performance.
- Think about their greatest achievements and contributions throughout the year.
- Reflect on what could have gone better and how to improve in these areas

# Step 3. Plan

## Plan and agree future performance and development objectives

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

Ensure that objectives are related to departmental objectives and priorities, allowing your reviewee to see how they are contributing to the overall success of the team, department and university. Ideally, objectives should be agreed by both parties.

### Performance objectives

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

### Development objectives

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

reviewee to agree a development plan and use it to support their growth in their role, increase their contribution and support their progression (if desired).

### Don't forget:

- Development is far broader than just attending training courses. There are many other development opportunities staff can explore, including: mentoring; coaching; job shadowing; self-assessments; on-line learning, personal development courses and peer learning. Skills, knowledge and experience can also be developed through variations in current work,
- There may be occasions where you are unable to accommodate individual development requests. In this situation, be honest about the limitations and seek to find alternatives where possible.

# Step 4. Record

## Document the 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 [People Manager](#).

Ensure that you both have a record of the agreed objectives and future development needs to refer to throughout the year. It is your reviewee's responsibility to lead on exploring and actioning the development activities identified. Be prepared to revisit objectives to ensure their continuing relevance as time passes.

If you are using the standard forms, you and your reviewee should complete the [PDR Record form](#).

## Don't forget:

- The value of the PDR process comes from keeping the resulting objectives and plans in mind over time. It is important for you to meet regularly throughout the year, providing on-going feedback through informal one-to-one discussions.
- Where desired / appropriate a mid-point review can be arranged to reflect on progress against objectives and development activities.
- Conversations linked to induction, probation, and promotion will also offer opportunities to understand the strengths of colleagues and where additional support may be needed.