

## Personal Development Review planning and preparation for Managers

Personal Development Review (PDR) is mandatory for all staff on an annual basis. The focus of PDRs is to review achievements and give feedback against employee's agreed objectives; identify learning and development needs to support the achievement of organisational and work goals and discuss career aims and aspirations.

### Indicators of a quality PDR

- Generates a clear understanding of role specific expectations and performance objectives; in line with the University's plans and goals.
  - PDRs should be carried out in a fair and equitable way.
  - Individual personal and professional development needs are considered to support staff's objectives and career development goals.
  - An update on the last year and the agreed objectives and development needs will be available in the completed online form.
  - Feedback must be honest, balanced and evidence-based. There should be no surprises.
  - The process includes flexibility to allow for local or role specific requirements (e.g. timescales, part time working etc).
  - Effective feedback, including giving constructive criticism or acknowledging key achievements is essential and a fundamental part of the PDR.
  - Everyone involved must have the all the relevant information to carry out a discussion which is consistent and fair across staff groups.
  - The line manager/ reviewer and the staff member will have a genuine, constructive, two way discussion.
  - All those involved must take ownership and play an active part to ensure that the conversation is meaningful, relevant and productive.
  - The conversation must not be viewed in isolation. It builds on regular discussions about work progress and/or feedback held throughout the year.
  - A staff member's complete role or roles within the University is/are considered.
- All parties involved must approach the discussion with mutual respect for the other person's views, skills, abilities, knowledge and experience.

| Preparation                                                                                                                                                                                                                                                                           |  |
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| If you are new to conducting PDR or need some additional information, please take a look at the following resources – <b>Guidance on completing the Personal Development Review</b> and attend training where necessary (link to staff development schedule)                          |  |
| Check when your reviewee last had their PDR. Ensure you arrange this year's PDR in the PDR window, January – March. You will be reviewing the previous calendar year.                                                                                                                 |  |
| Remind your reviewee about the process and make them aware of resources available: <ul style="list-style-type: none"> <li>• <b>Guidance on completing the Personal Development Review</b></li> <li>• <b>Personal Development Review (PDR) Planning Sheet for Reviewees</b></li> </ul> |  |
| Book adequate time for the meeting; <b>at least one hour</b> and book a suitable room.                                                                                                                                                                                                |  |

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| You need to create the reviewees' PDR form in <b>MyWorkplace</b> (under Goals and Performance). The reviewee will be able to view last year's objectives in their current PDR form for reference.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |  |
| Ask reviewee to complete section 1 of their PDR form at least 7 days prior to their PDR meeting.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |  |
| Read through reviewee's Personal Review Summary (section 1) and supporting documentation and note down points to discuss at the meeting.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |  |
| If appropriate, seek feedback about reviewee from other sources, e.g. another manager who has worked closely with reviewee.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  |
| Make sure your phone is switched off and the meeting will not be disturbed.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |  |
| Check that all <b>Mandatory Training</b> and role specific training has been completed. If not, completion must be included as an objective.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |  |
| <p>Make your reviewee feel at ease. Start the discussion by asking them to reflect generally on the last 12 months.</p> <p>With the reviewee, reflect on their contribution, progress and development over the past 12 months referring to their PDR summary (section 1 of their PDR form). Acknowledge any challenges or difficulties that may have hindered progress. Acknowledge any accomplishments outside the objectives previously set.</p> <ul style="list-style-type: none"> <li>• Discuss line management/leadership role where applicable to your reviewee</li> <li>• Refer to teaching and teaching diaries where applicable</li> <li>• Contributions outside of job roles e.g. leading projects/workstreams, public engagement, leading networks or committees</li> <li>• Promotion where relevant for academics</li> </ul> <p>Raise any disappointments or difficulties with tact and sensitivity. Do not raise performance issues for the first time in a PDR.</p> |  |
| Where the PDR relates to a clinical academic ensure evidence from the joint appraisal is attached as a PDF to their PDR form in <b>MyWorkplace</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |  |
| Agree <b>Objectives</b> for the coming year and be realistic. If the reviewee works part time they may have fewer objectives than a full timer. If an objective is time intensive consider how many other objectives should be set.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |  |
| Discuss <b>Career Aspirations</b> . Allow reviewee opportunity to talk about career goals or future plans. Consider how you might be able to support them. You might discuss promotion, secondment, flexible working etc. Do not make formal agreements in the PDR; other processes and policies support this, e.g. flexible working etc.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |  |
| Ask your reviewee if there is anything else they would like to talk about before you close the meeting. <b>Thank your reviewee for their contribution!</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |  |
| Complete the <b>Summary Comments from the Reviewer</b> in the PDR form (as applicable) based on the PDR discussion. Ensure you reflect the PDR discussion and don't introduce                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |  |

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| new elements. Try to make this section as positive as possible. Let the reviewee know once you have completed your summary comments. |  |
| Raise any issues with your Director/Senior Manager as required and discussed as part of the PDR.                                     |  |
| Ensure your reviewee completes <b>Summary Comments from the Reviewee</b> so the PDR form has all sections completed.                 |  |