

PDR guide for staff





Your PDR discussion provides the opportunity to reflect on, review and evaluate your contribution from the previous 12 months. This will have been informed by the ongoing dialogue you have had throughout the year with your manager or reviewer.

It is also a time to plan for the next 12 months by setting objectives that are focused on your role and development.

An effective review discussion requires preparation and engagement from all parties. Where this works well staff feel energised, focused and valued.

A PDR does not preclude or replace the availability and use of other developmental conversations and tools found in the form of mentoring and coaching. Colleagues are encouraged to utilise these where appropriate.

This document aims to guide you through the PDR process, identifying the key steps and how you can get the most out of your review.

The process

Email from Head of School or Section about PDR, including:

Who your reviewer is

PDR documents and resources

Internal deadlines

Reviewer to set a date for PDR – ideally with no less than 2 weeks notice

Prepare for the PDR meeting

Using resources | CV | last years PDR/SDR

Hold PDR review meeting

Reviewer writes up the PDR form and returns to Reviewee for signature

Reviewee signs and returns the form to the PDR co-ordinator copied to the reviewer and retain a copy as a working document

PDR coordinator processes this form

Send form to Head of School or Section for info

Original form filed in individual staff file

Preparation for the review discussion

A variety of resources are available to you and your reviewer to support the preparation for an effective PDR discussion.

You may choose to make some notes. When doing this, think about specific examples to support the elements you wish to discuss. You will almost certainly want to think about relevant points and contributions you can make to the discussion.

You will need to agree with your reviewer a suitable date and time for the review discussion, generally this should be about 2 weeks ahead.

Before the meeting you are encouraged to exchange items for discussion with your reviewer to allow necessary thought and preparation ahead of the conversation.

The review discussion

Thought should be given to the venue for the discussion, the best venues will allow for an informal layout of furniture and avoidance of interruptions. Both parties need to allow a reasonable period of time for the discussion.

The discussion will be conducted around the structure on the form. Typically most discussions will include at least:

- A joint review and evaluation of last year's objectives or main activities
- A discussion of how you have contributed to the priorities and objectives of the School/Service and University
- A joint consideration and setting of objectives for the next period
- A joint consideration of training or professional development needs
- An opportunity for a broader discussion on how well colleagues, teams and groups work together, including feedback on management or University issues.
- Agreement of actions by both parties

Completing the paperwork

The expectation is that the reviewer will complete the majority of the PDR form.

The reviewer can either agree what is to be recorded with the member of staff during the discussion and write it there and then, or complete a draft promptly after the discussion.

The completed PDR form should be held centrally by your School Administrator/PA, but a copy also retained by you and the reviewer to allow it to be a living document that can be reviewed and referred to on a regular basis.

My contribution

A summary of the key elements of the discussion should be recorded. This is likely to include the key achievements of last year, feedback from those who benefit from your work and examples of where you are demonstrating the University Values and Professional Behaviours. It may also include acknowledgement of difficult circumstances or particular challenges faced throughout the year, or an undertaking to make more appropriate use of skills. You do not need a word by word account of the entire discussion, but a summary of the key issues.

Of special note

Use this section to record any particular achievements, perhaps: a new qualification; the successful launch of a new system; a new responsibility handled especially well; excellent organisation of a special event; a wider contribution to the University or community; outstanding teaching; the development of a new course; a major research grant; a key publication; an award or honour etc. Anything which stands out during the year and merits a special mention because this may be an indication that your performance is above and beyond normal expectations.

The remaining parts of the form can be completed by you or the reviewer either during or after the discussion.



Plans for the next 12 months

Objectives

A requirement of the PDR is to set performance objectives and for individuals to take a proactive involvement in this. These will form the basis of the review discussions throughout the year so you both need to be clear what you have agreed.

You may find it helpful to think about your objectives in SMARTER terms wherever possible:

- Specific
- Measurable
- Achievable
- Relevant
- Time-bound
- Engaging
- Reviewed

My development

These are the skills and knowledge which need to be developed in order to achieve the objectives set out in the PDR discussion and to perform our roles to the best of our ability.

The University Values and Professional Behaviours provide a framework to consider how we work together and how we can develop our contribution further.

My future

The PDR provides a formal opportunity for you to plan your future career development, whether that be for passing probation, promotion, change of role, personal challenge or retirement.

Do also remember that there are many more options than attending training courses. Here are a few ideas of other development opportunities:

- Mentoring
- Coaching
- Secondments
- Temporary membership of a Working Party
- Project work
- Job/task/role rotation
- Observation, peer review
- Attending conferences
- In-house informal discussions/seminars
- Tutoring of or by peers
- Visits
- Placements
- Internal and external committee work
- Training or inducting new staff
- Time set aside for self-paced learning
- Representing the School or University in a wider context
- Giving new presentations
- Organising events
- Review, evaluation or audit activities
- Planned or guided reading
- Organising a consultation exercise or gathering systematic feedback
- Acting as a reviewer/examiner
- Team activities
- A new challenge or responsibility
- Joining or creating a network of contacts

Your comments

Following the review discussion and after receiving the completed form, you can capture your thoughts, reflections and observations about the review year and what is planned for the future.

Where further clarification is required regarding the content of the form, this should be discussed and explored with the reviewer in the first instance.

Signing the form indicates that it is an accurate reflection of the review discussion. The form does not need to be printed and signed, it can be signed electronically, by typing your name where required.

Reviewer's comments

This is an opportunity for the reviewer to provide a summary of their comments and reflections following the review conversation. This is a further opportunity for recognition, praise and to acknowledge your contribution and future aspirations.

Follow-up

The agreed outcomes of the review will be most effective if you both make a commitment to follow up. Perhaps a brief formal 6 month review or an informal quarterly progress check – whatever will work best for you.


Centre for Quality, Support and Development

CQSD offers an extensive range of courses and workshops for all groups of staff. For the latest programme, please see our web site at www.reading.ac.uk/cstd. For a more general idea of the opportunities available throughout the University, please refer to the annual 'Staff Training and Development Opportunities' programme. Details can be found on the CSTD website, Employee Self-Service, the training updates email list and via the weekly email to Deptsecs.

Feedback on the PDR scheme

Feedback on the scheme is welcome from any member of staff. Comments may be sent in writing to your HR Partner. www.reading.ac.uk/humres-professionalandadvisory.aspx

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 For more information, please contact:

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