

Performance and Development Review

Guidance Notes

The annual Performance Development Review (PDR) is an individual face-to-face meeting between the jobholder and their manager. The purpose is to evaluate performance to recognise success and reinforce effective performance and to examine the areas for improvement. The PDR should be part of an ongoing dialogue between individuals and their line manager. The individual should, in general terms, be aware of their performance throughout the reporting period and so significant performance issues should not come as a surprise at the meeting. The meeting is a two-way conversation and there should be ample opportunity for the employee to talk about their performance, development needs etc. during the reporting year.

Start of Reporting Period (Objective setting)

At the start of the reporting period the manager and employee should meet and agree objectives. These should be SMART:

Specific	They should be clearly worded and describe the desired outcome
Measurable	They should be described in quantifiable terms where possible
Achievable	They need to be challenging but possible
Relevant	They should be relevant to the job and the individual
Time bound	The date for completion should be stated

The objectives (usually no more than eight) should be reviewed on a regular basis, certainly at the mid review stage. The PDR is not a static document meaning that objectives may change during the reporting period or new ones be added if priorities change.

Mid and Year End Appraisal meetings

In preparation for these meetings both parties should allow time to prepare thoroughly, by:

- Reviewing the objectives or job description and reflecting on performance in core areas of work, including progress made towards achieving the agreed objectives
- Gathering examples and thinking about questions they may want to ask
- Considering any training and development needs

Before the meeting the employee should prepare an initial assessment of their own performance, which they should send to their manager in advance of the meeting. The self assessment should be a balanced view looking at things that went and also where things could have been improved. The individual should also identify any areas for future development, ready to discuss these at the meeting.

The Meeting

1. Performance Review and Evaluation

The manager should give constructive and balanced feedback on performance, identifying both strengths and areas for development. There should be a two-way discussion of successes and progress. Any barriers to the achievement of objectives, key tasks or activities should be identified and possible remedies agreed.

There are only two ratings but the text can bring to life the performance of the individual during the reporting period, describing where achievement has been particularly strong or where it still needs development. This applies to each objective or work activity as well as to overall performance.

Performance Rating	Description
Effective	Has consistently met all requirements to the appropriate quality standard
Ineffective	Has not met some or all of the objectives or has failed to meet the required quality standard

2. Development

It is important that areas for development are identified. Development may include developing strengths as well as actions to improve on weak areas. Development does not need to be a formal external course but can include shadowing, on line information, mentoring from a manager or colleague etc.

3. Objectives for the coming year

The end of the process should be setting the following years SMART objectives.

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Employee Name	
Job Title	
Review Period	
Review Date	
Reviewing Manager	

Objective Setting

Performance Objectives

Up to eight objectives should be agreed at the **beginning of the reporting period** (add more boxes as needed). These should be SMART.

Performance Objectives

Training and Development Objectives

Agreed training or development goals should be included in this section with timescales.

Training Objectives

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Employee Self Assessment (Mid Reporting Period)

complete this box or attach a separate sheet

With particular reference to your objectives think about examples to demonstrate things which went well, what tasks or activities presented particular challenges and where you think you would benefit from further development. The kind of topics you could cover in this section are:

- Your contribution to enhancing the student experience
- Teamwork (working together with colleagues)
- Support given to others (eg colleagues, students, visitors)
- Support received from line managers, colleagues etc.
- Communication (written and spoken)
- Self (and team) organisation in both day-to-day activities and larger projects
- Professional, technical and practical skills

Manager Assessment (Mid Reporting Period)

Use this section to comment on the employees performance during the reporting period, including things that went well and those where improvement may be needed. At mid-point the employee should be aware of the rating they are heading towards at year end.

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Employee Self assessment (Year End)

complete this box or attach a separate sheet

With particular reference to your objectives think about examples to demonstrate things which went well, what tasks or activities presented particular challenges and where you think you would benefit from further development. The kind of topics you could cover in this section are:

- Your contribution to enhancing the student experience
- Teamwork (working together with colleagues)
- Support given to others (eg colleagues, students, visitors)
- Support received from line managers, colleagues etc.
- Communication (written and spoken)
- Self (and team) organisation in both day-to-day activities and larger projects
- Professional, technical and practical skills

Training and Development

Please record any training courses attended in the last year

Date	Organising Body	Description	Qualification

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Manager Assessment (Year End)

Use this section to comment on the employees performance during the reporting period, including things that went well and those where improvement may be needed. The comments included should justify the end rating.

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Overall Rating	Effective	Ineffective
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Signatures

Employee		Date:
Manager		Date:

Employee Comments (Optional)

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When complete please return the form including the self assessment to the Human Resources Office.