

## Performance Development Review Procedure

### 1. INTRODUCTION

Performance Development Review (PDR) provides an opportunity to raise the quality of services provided by the college through a highly motivated and competent workforce. If done well it will support the college's strategic ambitions by translating high level strategy into each individual's role, increase job satisfaction, identify appropriate training and development and provide an opportunity for personal development based on informed feedback. The college's core values of "respect" "integrity", "collaboration", "high expectations" and "responsibility", should be embedded in the planning and review of work performance and learning for all employees, as should the college's duty to promote equality and diversity.

The aim of the scheme is to be highly participative. Emphasis is placed on self-appraisal and ensuring that staff have a major role in determining their own development. It is also future orientated, being chiefly concerned with setting objectives and improving performance. All staff should see it as a positive process.

### 2. PURPOSE OF THE SCHEME

2.1 The purpose of the PDR scheme is to:

- review performance;
- set objectives for the future;
- review Continuous Professional Development (CPD) activity and the impact of this;
- identify future training and development needs.

### 3. ELIGIBILITY

3.1 The PDR process applies to all staff.

3.2 Sessional and variable hours staff will be paid at the meeting rate to attend a PDR meeting.

3.3 Employees in their probationary period should be set short term objectives as part of their probationary review meetings during the first six months of employment with the college. The timescales for achieving these objectives should be set to slot into the college PDR cycle and be appropriate to the length of time left in the cycle, their job role and hours. They are therefore likely to extend beyond the probationary period. These initial objectives should be reviewed in the employee's first PDR and new objectives for the future may then be set as appropriate.

3.4 Redundancy – it will not be appropriate for anyone at risk of redundancy to have a PDR.

#### 4. FREQUENCY

- 4.1 To comply with the policy two meetings a year should take place.
- 4.2 A review should take place around 6 months after objectives are set. This is to discuss progress against objectives. However, as part of the revised PDR process, frequent, continuous conversations regarding objectives and development goals are strongly encouraged to take place during 1-1 meetings throughout the year. This provides an opportunity to ensure that initial objectives are still appropriate and if necessary, agree new or revised objectives. Line managers should not, however, wait until a PDR or objective review to praise individuals or raise any issues with them as this should be a continuous process.

#### 5. TIMING

- 5.1 Appendix one demonstrates the expected timings of PDRs to take place.

#### 6. REVIEWERS (Managers)

- 6.1 The individual's immediate line manager will normally conduct the PDR. If there is a disagreement over the person nominated then in very exceptional circumstances it may be possible for an alternative nominated appraiser to undertake the PDR.
- 6.2 Where an individual's role requires them to be responsible to, or work closely with two managers, only one manager will normally conduct their PDR, unless the individual agrees to both managers participating. If only one manager conducts the PDR the absent manager should provide feedback to the manager conducting the PDR before the meeting takes place. They should also have opportunity to comment on the PDR forms. This also applies to the 6 monthly review meetings.
- 6.3 No reviewer will undertake PDRs without having received PDR training. Training will be coordinated by the People Development team and communicated via Staffnet. One to one support is available through HR Business Partners.

#### 7. OBJECTIVES

- 7.1 Objectives are set annually.
- 7.2 Individuals are usually set 4 key objectives with an objectives linked to Digital for all staff and one objective specifically linked to Teaching practice (for teaching staff) . However for some staff it will be appropriate to have less than 4.

#### **Some staff/roles may have generic team objectives or standards.**

- 7.3 If a member of staff is part-time they should be set 4 objectives however the scope of these should reflect the hours they work.
- 7.4 Individual objectives should be SMART; Specific, Measurable, Achievable, Realistic and Time related. This is to ensure that objectives are fair, reasonable and success in achieving objectives can be monitored.
- 7.5 Agreed objectives must be job related and linked to an individual's job description. The reviewee should see their objectives as part of their role and not additional to it.

- 7.6 When the department manager meets with all the reviewers, they should not only agree timeframes, as mentioned in point 4.3, they should also discuss college and departmental priorities to inform the setting of objectives.
- 7.7 When setting objectives, consideration should be given to baseline evidence i.e., where the reviewee is now, where they want/need to be and how will they get there. At the end of the cycle the same evidence can be measured to show impact.

## **8. PDR DOCUMENTATION**

- 8.1 PDR forms should be used to plan and record the PDR meeting and should include a review of performance, the objectives that have been set and the personal development plan.
- 8.2 Copies of PDR documentation should be retained by the reviewee and reviewer for regular review and monitoring. Copies should also be returned to HR to be kept on personal files and specific learning and development needs which require funding approval should also be shared with People Development. The appraiser should update MyHR immediately following the PDR meeting.
- 8.3 All documentation to support the PDR process is available on Staffnet. This includes:
- PDR form;
  - guidance notes for the reviewer and reviewee on how to prepare, conduct and follow up on an PDR;
  - guidance notes on Development Goals planning and the link with PDR;
  - guidance notes on values and behaviours and how to use these to set objectives and review performance;
  - questionnaire to evaluate the PDR process;
  - example objectives.

## **9. THE PDR MEETING**

- 9.1 The PDR meeting should be scheduled to last no longer than an hour.

### **9.2 Before the meeting**

Preparation by both parties on what has worked well and areas for development.

### **9.3 During the meeting the appraiser should**

- 9.3.1 Set the scene. Explain the purpose of the meeting and how long it will take. Talk through the paperwork. Emphasise the meeting should be an open and honest two-way discussion.
- 9.3.2 Review. Be constructive, give praise where due and discuss areas where improvement is needed in a positive way. Listen to and discuss staff needs in regards to their development. Agree any appropriate changes to the job description. Use the preparation form to guide the discussion and review the CPD the reviewee has undertaken. If there are any issues these should be raised halfway through this stage of the meeting; however there should be “no surprises”. This stage of the meeting should be closed on a high note.
- 9.3.3 Agree objectives. Having reviewed performance the year ahead should be discussed and where appropriate 4 objectives agreed.

9.3.4 Identify training and development needs. Having reviewed performance and agreed objectives consideration should be given to the support an individual will need to achieve their objectives.

9.3.5 Summarise. Summarise the meeting re-iterating who will do what, confirm the objectives and agree the date for the next meeting.

#### 9.4 **After the meeting**

Agree who is to write up the review and targets using the appropriate paperwork. This should be signed by both the reviewer and reviewee within a week of the meeting and the manager should update MyHR.

9.5 Spend about 60% of the time reviewing and 40% of the time setting targets and discussing the future.

### 10. **LINKS TO OTHER PROCESSES**

#### 10.1 **Lesson observation process**

Feedback from deep dives may be used during the PDR process for delivery staff and inform objectives

#### 10.2 **CPD**

All full-time staff are required to fulfil a minimum of 30 hours CPD a year. This is pro rata for part-time and sessional/variable hours staff but should not be below a minimum of 6 hours a year.

The personal development plan that is put together during the PDR process feeds into the 30 hours CPD.

#### 10.3 **Promotion and salary review**

The PDR is separate from pay and therefore matters relating to salary will not be discussed during the PDR meeting.

### 11. **CONFIDENTIALITY**

11.1 All discussions during the PDR interview will be confidential to the reviewer and reviewee. The priority tasks agreed are not confidential and will be disseminated as appropriate.

### 12. **RESPONSIBILITIES OF ROLE**

#### **Director/AP/Head of School or Service**

- Ensure all staff in their area are appraised in line with the PDR procedures and cycle

#### **Reviewers (line manager)**

- Conduct an annual PDR and 6 monthly review
- Complete all appropriate paperwork and ensure this is signed and returned to HR and reviewee
- Share with reviewee's information about college and departmental objectives as well as objectives for the appraiser/team where these are relevant and appropriate
- Are familiar with the college PDR Procedure
- Attend PDR training
- Update MyHR

## **Reviewees**

- Prepare for and participate in their PDR
- Ensure they are aware of the procedure
- Attend PDR training

## **Human Resources (HR)**

- Write and review the PDR Procedure
- Issue reminders to reviewers and reviewees that PDRs are due
- Monitor the operation of the scheme
- Provide advice and support to staff and managers on the operation of the procedure
- Arrange PDR training
- Retain PDR records on individual's confidential files
- Review personal development plans to identify generic training needs that link into the department/school staff development programme

## **13. EQUALITY AND DIVERSITY**

- 13.1 The line manager will ensure there are no barriers that could impact on the individual's ability to participate in the PDR process, for example, if an individual has a disability appropriate reasonable adjustments should be made.

## **14. APPEAL**

- 14.1 There may be occasions where the reviewee and reviewer may not agree on who carries out the PDR or the outcomes of the PDR meeting.  
Where this happens both should meet with the reviewer's manager as soon as possible to discuss areas of disagreement.
- 14.2 If this is not appropriate HR will appoint another senior representative to act in this capacity. This person will be responsible for making a final decision concerning the PDR and should confirm their decision in writing to both parties. If after this process the reviewee remains unsatisfied then they should follow the Fairness at work Procedure.

## **15. APPROVAL AND REVIEW**

- 15.1 The PDR Procedure is agreed with our recognised Trade Unions.

## Appendix 1 PDR Cycle

