



Personal Development Review (PDR) Planning Sheet for Reviewees

You are responsible for preparing for your PDR meeting. You can do this by:

- reviewing your last year
- gathering evidence of your achievements
- thinking about opportunities for your professional and personal development and performance
- you may also want to look at the quick checklist (below) to help you prepare for your PDR

In most PDR discussions, you should find yourself doing more of the talking. It is helpful if you take personal ownership of your role, and role specific development. Normally, you will be given the opportunity to:

- share your experiences from the past year relating to your work, achievements and development
- input into your agreed objectives for the next year
- discuss and plan your development

Your line manager or reviewer will also come to the meeting with role and career specific goals and objectives to discuss with you.

Indicators of a quality PDR

- Generates a clear understanding of role specific expectations and performance objectives; in line with the University plans and goals.
- PDRs should be carried out in a fair and equitable way.
- Your personal and professional development needs are considered to support your 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.
- Effective feedback, including giving constructive criticism or acknowledging key achievements is essential and a fundamental part of the PDR.
- Everyone involved in the PDR must have the all the relevant information to carry out a discussion which is consistent and fair to staff.
- The line manager/ reviewer and the you as the reviewee 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.
- Your 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.

Personal Development Review (PDR) Checklist

This checklist will help you to prepare for your PDR meeting. Ideally, you should refer to this at least 2/3 weeks before your PDR to start thinking over areas for discussion including your work achievements, completion or changes to objectives, staff development completed, needs moving forward and career aims and aspirations.

Your PDR form is accessed in **MyWorkplace** under **Goals and Performance**

Your job
Look at your last PDR and your work objectives. Review your objectives and consider if any are outdated or have changed due to changing business or work priorities.
In what ways has your job changed since the last PDR?
In preparing for your PDR create a draft list of work objectives for the year ahead (January to December).
Your performance
List your main successes and achievements since your last PDR.
Note your progress during the period under review against the expectations of your role and provide evidence to support. Have any data that supports progress, together with third party feedback where relevant.
Identify the aspects of your work that you have found the most satisfying.
Have there been any challenges, frustrations or disappointments? For each, identify the steps you have taken to resolve them and/or suggestions for improvement
Have been there changes to your job, or the way you do it ? What would make you more effective in achieving Institute/team objectives or your job more satisfying.
What aspects of your role or work outside of job role, e.g. membership to a network or committee, utilised your strengths? Is there an opportunity to develop your role in line with these?
What aspects of your performance need to be developed to enhance your effectiveness?
Your development
What were the training and development needs you identified on your last PDR.
How have you developed over the last year? Ensure your training is up to date in MyWorkplace under Career and Development .
How did you apply your training to your job? Identify new pieces of work you have worked on, or new or additional responsibilities you have taken on.
What additional skills or knowledge would you find useful in improving your performance in the coming year?
What skills or knowledge do you have that are not used in your present job but you would wish to use?
Be prepared to propose ideas for how you can develop in your job. If you are looking for your career to develop in a particular direction, seek guidance or support.
The work objectives which are likely to be set at your PDR meeting for the next year. Do you need training/development in order to meet these objectives?
Upward feedback

Ask yourself the following questions to help you think through the feedback you want to give your reviewer:

What is working well? (Consider the team or organisational culture, your manager's style, systems, procedures, etc.)

If relevant suggest and explore better ways of working together.

If you can see ways of improving systems and procedures, take the opportunity to raise these.

What could your manager or colleagues do differently to help improve your performance? Use specific examples, if possible.

Before your PDR meeting

Complete part 1 of the PDR form - Personal Development Review. Your reviewer will need to see this before the PDR meeting.

After your PDR meeting

Complete your Personal Review form by completing the Summary Comments from Reviewee in your PDR form. Let your reviewer know once you have completed them.

Review the Summary Comments from your Reviewer in your PDR form.

Ensure a meeting is scheduled to firm up your objectives for the coming year and development for the coming months, along with regular 1:1s to review progress.

Research options for meeting your development needs.