

Benefits, Role and Responsibilities of a Reviewer in the PDR Process

Benefits for reviewers

The PDR framework provides reviewers with the opportunity to:

- Spend regular time with individuals to discuss their roles, development, achievements and contributions and aspirations
- Recognise achievements, contributions and review the impact of development through constructive conversations
- Prioritise and plan development needs for the individual and the department
- Ensure that their teams and reports understand agreed goals and aspirations that collectively contribute to the aims of the department and the wider University
- Hear feedback and generate suggestions for enhancing the work of the individual, team or wider University department

Benefits for the University

The University believes that in implementing a PDR scheme it:

- Provides all employees with a voice and a role in the achievements and future development of the University
- Provides the opportunity to colleagues to develop and be appropriately equipped for their roles, both now and for the future
- Provides a framework for the consistent review and recognition of development, achievements and contributions
- Ensures clear and effective communication of departmental aims and strategic objectives through regular two way conversations
- Increases reviewee engagement and motivation
- Provides a framework to enable the alignment of goals with those at a team/departmental/University level

PDR frequency

It is anticipated that conversations around PDR will take place on a regular basis throughout the year as part of good and normal working practice. A PDR conversation should take place between May and July of each calendar year as a minimum requirement.

Roles and responsibilities

Typically, 2 people are involved in any PDR conversation, the reviewee and the reviewer. Occasionally, input may be sought from others with whom the reviewee works closely. Please consider any local arrangements relating to this. Prior to the discussion, the reviewee reflects on and records their development, achievements and contributions during the period, and an overall summary in preparation for the PDR conversation. Reviewees may also wish to draft thoughts on their future development and goals for discussion in the PDR meeting.

Reviewees then forward the document to their reviewer (5 days before the PDR meeting) to enable reviewers to prepare.

The REVIEWER

The reviewer is the person facilitating the PDR conversation. In many cases this will be the reviewee's line manager. In some cases however (including academic departments), where leaders and managers are managing large groups of staff, Head of Departments can share review meetings among a number of appropriate reviewers. In these cases, reviewees will be informed beforehand as to who will be their reviewer, being someone from their department appointed by the Head of Department. The reviewer may in these situations ask for additional input from other colleagues who have worked closely with the reviewee to obtain helpful feedback prior to the PDR conversation.

In a rare circumstance where there is a disagreement, the reviewer's line manager or a third party can be asked to be involved in the PDR. Please speak with your HR Adviser if required.

Planning and preparation

1. Agree a date and time for the review meeting, allowing enough time for preparation (usually at least a week) and a time for the meeting
2. Refresh your memory of the PDR process and skills. The Moodle and support materials on the PDR website provide some useful guidelines on this.
3. If this is your first PDR conversation with this reviewee, talk through the purpose and process with them and ensure they know you are committed to having a constructive, useful discussion
4. Ensure the reviewee has the appropriate form to complete and has the opportunity to ask any questions
5. Based on the reviewee's previous PDR documentation, consider their development, achievements and contributions during the period. If appropriate gain additional input from other colleagues who have worked closely with the reviewee to obtain helpful feedback prior to the PDR conversation.
6. Consider future work goals for the individual, seeking input from more senior managers and individuals as necessary in order to predict future requirements and changes
7. Complete your part of the PDR documentation as appropriate
8. Anticipate any potential challenges that may arise as part of the discussion (noting that any challenges should have been discussed at the time they occurred) and think through how you will handle them (see section on difficult conversations – page 11 of the 'How To' guide)
9. Don't raise any major concerns with the reviewee during the PDR if these have not previously been discussed. There should be 'no surprises' raised at the discussion.
10. Make a note of any actions that need to be agreed by the end of the conversation.

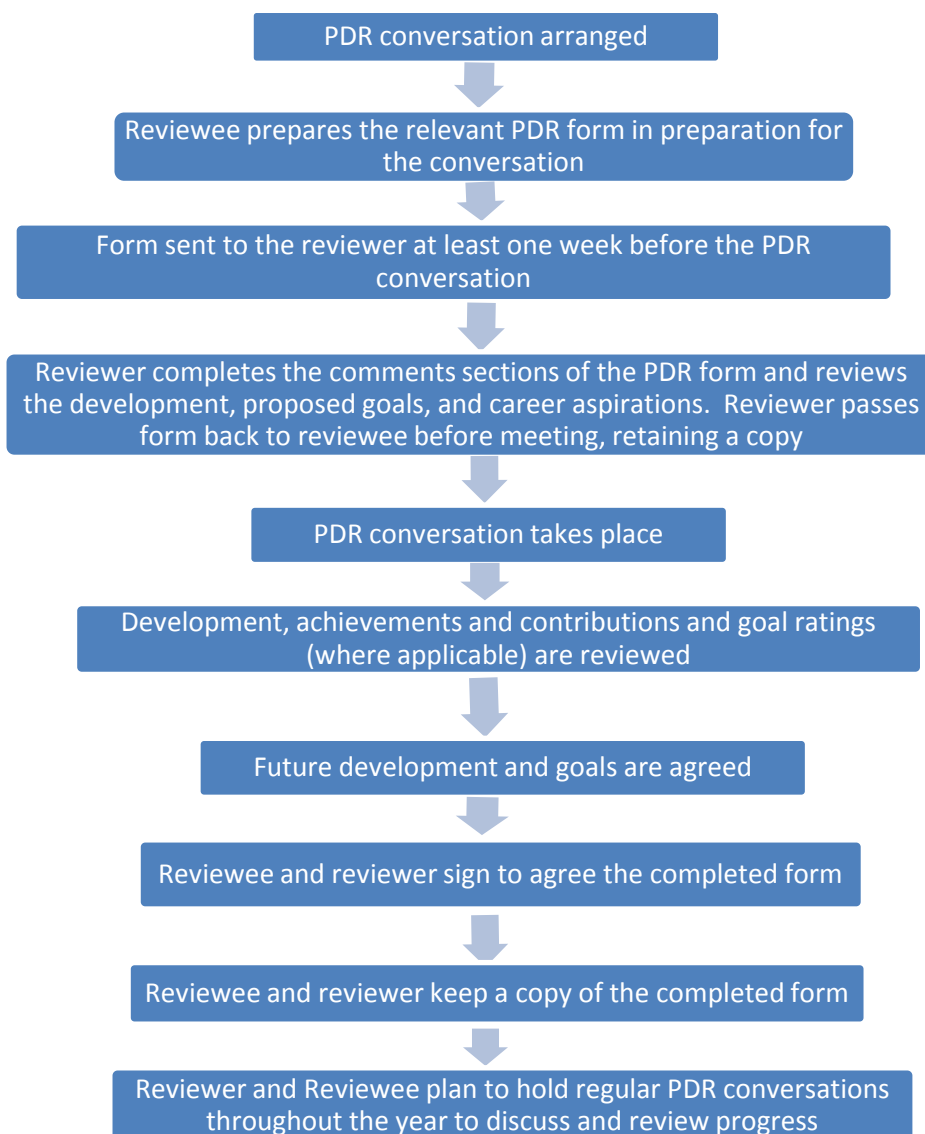
Practical arrangements

1. Book an appropriate venue for the conversation
2. Ensure there are no interruptions
3. Ensure you are familiar with the department's/school's five year plan and strategic goals and objectives so that individual goals can be appropriately linked

Follow up

1. Provide the reviewee with the necessary support and appropriate resources to access agreed development and as agreed with your Head of Department

PDR process flowchart



Please note:

1. This PDR process flowchart helps to outline the order in which process actions take place.
2. Consider any local arrangements relating to this process
3. If it is appropriate, you may wish to separate the 'look back' and 'look' forward conversations