

INTRODUCTION

The Performance Development Review (PDR) is an important process in the University to provide a focus for you to reflect and talk about your work, contribution and career development. The PDR also ensures that you are clear about your objectives and expected contributions to achieve the University's objectives.

In the PDR your reviewer will provide you with feedback about your work, will discuss what has helped and hindered your ability to contribute effectively and identify appropriate professional development and / or support.

The PDR form has the following sections to complete:

- **SECTION A**
Part 1– Review and Contribution - is a review of the previous period's activities.
Part 2 – Looking forward - here you note your objectives for the following period.
- **SECTION B**
Part 1 – Summary of Progress – this is a summary of the discussion in the PDR.
Part 2 – Agreed objectives and contribution for the next period – this outlines the key aims for the next period.
- **SECTION C** - This is a quick checklist of University-related topics that have to be discussed in the PDR and check of the; contractual, mandatory and compliance training that you as a member of staff should complete.
- **SECTION D** – Is a summary of training and development plan agreed for the next period.
- **SECTION E** – allows you or the reviewer to include any additional comments that have not been addressed in the previous sections.

Section A is completed by the reviewee and the other sections completed by the reviewer.

- Section A should be completed by you and returned to the reviewer at least 5 days before the PDR.
- The reviewer should complete the PDR form within two weeks of the meeting to be signed and agreed by the reviewer and reviewee.

SECTION A - REVIEW AND CONTRBUTION

- **Part 1– Review and Contribution - is a review of the previous period's activities.** In this section you should review your progress against the agreed objectives of the previous year and examine any factors that influenced the achievement of those objectives. If this is your first review this may be more difficult but during your first few weeks in your new role your manager will have discussed and agreed your key objectives.

You should also summarise the factors that contributed to your ability able to undertake your role effectively and identify any factors that may have hindered your ability to undertake your role as well as you had hoped during the previous period.

You should also note any issues have arisen regarding your workload or working relationships that have had a negative impact on your ability to undertake your duties effectively. This will enable the reviewer to deal with such issues separately to the PDR so that they can be dealt with constructively and if necessary, outside the PRD discussion. Or, in terms of workload this can be a specific item in the PDR so that the issue can be raised formally and addressed.

- **Part 2 – Looking forward** – you should note your **objectives for the following period** and, where relevant, place these in the context of your long-term career development. You should also note any professional development you wish to undertake to further enhance your professional skills and knowledge.

During the review, discussions based around this section will generally examine the factors that impact on your role and how they can best be supported. However, it is important to note that the broader requirements of the University are key and that solutions to some issues you identify may not be easily addressed.

SECTION B - THE NEXT 12 MONTHS

- **Part 1 - Summary of Progress** - This section contains a **brief summary of the PDR meeting and progress in the previous period.**
- **Part 2 – Agreed Objectives and Contribution for the Next Period** – this section should include agreed realistic, achievable objectives that provide a link between your individual objectives and that of the University. Agreed objectives should also take into account your overall workload, career aspirations and what training and development you wish to undertake.

SECTION C – ROLE RESPONSIBILITIES AND ESSENTIAL TRAINING CHECKLIST

The aim of this section is to ensure that;

- Your job description can be reviewed and updated if necessary.
- You ensure that you have completed the essential training relevant to your role.

The essential training that you may need to complete include:

Contractual Requirements: Welsh language – if you have a requirement to reach a specific level in the Welsh language your Annual Development Plan must be reviewed; and **Professional Training** – if there is a requirement to undertake any professional training as part of your role this must be discussed.

Mandatory Requirements: Topics in this area include: **On-line Equality Module** (All staff), **Equality for Managers** (All managers), **Health and Safety Induction at both University and local level** (All staff), **Job / Role Specific Training** (including additional Health and Safety training requirements), **Computer User Training** (All relevant staff).

Compliance Training:

In this area the following training should be undertaken: **Recruitment and Selection** - for all staff who take part in the recruitment and selection process, **Data Protection** – for staff who deal with and manage any kind of personal information, **Freedom of Information** – for managers and front line staff who may receive or are asked to deal with a Freedom of Information request, **Child Protection** – for any staff who deal with children as part of their role, **Prevent Training** – for all front line and academic staff for whom knowledge about Prevent is necessary.

If you have not completed the relevant training, actions to undertake the necessary training must be noted in Section D (Personal Development Plan) and be completed within the next review period.

SECTION D – PERSONAL DEVELOPMENT PLAN

This section will note the personal development activity that will support you in your role during the next 12 months. Please be aware of the wide range of development opportunities that are available to you.

SECTION E – ADDITIONAL COMMENTS

This section allows you and / or your reviewer to note anything that may not necessarily be covered in the other sections. This could include any observations or disagreements raised during the PDR.

When you and your reviewer have agreed the content and the new objectives the PDR form should be signed and a copy kept with the reviewer / reviewee or according to the relevant local procedures.

