

PROFESSIONAL AND SUPPORT STAFF PERFORMANCE DEVELOPMENT REVIEW - REVIEWER GUIDANCE

INTRODUCTION

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

In the PDR you provide staff with feedback about their work, discuss what helps and hinders their ability to contribute effectively and identify appropriate professional development and / or support.

The process gives you the opportunity to encourage and motivate staff to achieve their objectives and examine not only their short term objectives, but also to encourage staff consider what professional development they should undertake to enhance their long term career development.

Please ensure that as part of the Review you discuss the University's overall strategic objectives and the Reviewees' contribution to achieving those objectives. It is strongly recommended that this discussion is held early in the Review to provide a context for the discussion.

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 by the reviewee.
Part 2 – Looking forward - here the reviewee notes their objectives for the next period.
- **SECTION B**
Part 1 – Summary of Progress – this is a summary of the PDR discussion.
Part 2 – Agreed objectives and contribution for the next period – this section outlines the key aims of the Reviewee for the next period.
- **SECTION C** - This section is to ensure that the reviewee has undertaken all the relevant contractual, mandatory and compliance training relevant to their role and have an opportunity to discuss their job description if they wish.
- **SECTION D** – Is a summary of the training and development plan agreed for the next period.
- **SECTION E** – Is a section for the reviewer or the reviewee to include any additional comments that have not been addressed in the previous sections.

Section A is completed by the reviewee and the following sections are completed by the reviewer.

- Section A should be returned by the reviewee 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 the reviewee should review their progress against the previous year's agreed objectives and if relevant highlight the factors that influenced the achievement of those objectives.

Staff should also summarise the factors that contributed to their ability to undertake their role effectively and identify any factors that may have hindered their ability to undertake their role as well as they had

hoped during the last period.

Also staff should identify any issues that have arisen regarding their workload or working relationships that have had a negative impact on their ability to undertake their duties effectively. Although as a reviewer it is hoped that you are aware of such issues, this will enable the reviewee to raise any issues of concern. This may also enable you to deal with these issues constructively and separately to the PDR so that the PDR deals specifically with key objectives and development. Or, in terms of workload, workload can be a specific item in the PDR so that the issue is raised formally and addressed.

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

During the review, discussions based around this section will examine the factors that impact on their role and how they can best be supported. However, it is important to note to staff the broader requirements of the University and recognise that solutions to some issues 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, and achievable objectives that provide a link between their individual objectives and those of the University. Agreed objectives should also take into account overall workload, career aspirations and what training and development will enhance the reviewees' professional skills and knowledge.

SECTION C – ROLE RESPONSIBILITIES AND ESSENTIAL TRAINING

The aim of this section is to ensure that;

- The reviewer ensures that staff have completed the essential training relevant to their role.
- Job descriptions are updated if necessary.

Specifically this section includes:

- **Job description** – this is not compulsory but may be raised by the member of staff or the reviewer if it is felt necessary to update / review a member of staff's job description.

Also, in this section it is necessary to confirm that the reviewee has undertaken training relevant to their role and any mandatory and compliance training.

Contractual Requirements:

- **Welsh language** – if there is a requirement to reach a specific competency level in the Welsh language the Annual Development Plan must be discussed in this section and actions agreed to support the reviewee to achieve the required standard. The member of staff will have a Development Plan agreed with the Welsh Language Tutor. It is advised that you discuss the Action Plan with the Welsh Language Tutor beforehand so that you are clear about the reviewee's progress.
- **Professional Training** – if there is a requirement to undertake any professional training as part of the role this must be noted.

Mandatory Requirement:

The University requires staff to undertake mandatory training such as health and safety training. Also, in order to comply with equality legislation that aims to identify, tackle and eradicate unlawful discrimination and to help the University develop an inclusive workplace, the first step is to increase staff; knowledge, understanding and skills in this area.

Topics in this area therefore 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)

Please note that the University Health and Safety Induction takes part during the University's 'Welcome Programme'. Your College/School/Department is also required to provide relevant health and safety information to all staff.

Compliance Training:

Compliance training is training that is enshrined within University policies or it may have otherwise been determined as being good practice to which the University should adhere. It is concerned with minimising risk, providing assurance that policies are followed, and ensuring the University meets internal or external standards (which might include meeting needs arising from particular legislation).

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 the member of staff has not completed the relevant training, actions to undertake the training must be noted in Section D (Personal Development Plan) and be completed during the next review period.

SECTION D – PERSONAL DEVELOPMENT PLAN

In this section you should note the personal development activity that will support staff in their role during the next 12 months. Please be aware of the wide range of development opportunities that are available to staff that can include; on the job training, coaching and mentoring, relevant qualifications and accreditation professional and personal skills development, leadership development, improving IT skills, Welsh language courses, updating knowledge about the University, project work, attending conferences etc.

Note actions to undertake relevant contractual, mandatory and compliance training in this section.

SECTION E – ADDITIONAL COMMENTS

This section allows you and / or the reviewee 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 the reviewee 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.