

# PDR guide for managers





**As a Head of Service, Dean, Head of School, Department, Function or Section within the University you will be responsible for the overall leadership and management of the Performance and Development Review (PDR), including 'PDR Job Chat' for appropriate staff.**

This document guides you through the process, setting out key roles, responsibilities and milestones.

The Dean or Head of Service will guide the overall process, setting priorities and expectations for your area. You will also work closely with your School Administrator, Departmental PA or equivalent to coordinate the various activities. Your HR Partner/ Adviser will be a key point of contact throughout this process for advice and guidance.

## Confidentiality

An individual review should be conducted in line with the following confidentiality principles. The review discussion itself is a confidential discussion. The review form captures the key elements of that conversation. The reviewee and reviewer together agree upon what is to be recorded on the form. The completed form can be seen and used by those with management responsibilities for that individual (including the reviewer, Head of Department/School, Dean, Heads of Group/Support Service equivalent). The involvement of parties beyond this group should be with the agreement of the individual.

## Support from HR

Your HR Partner/Adviser will be a key player in supporting you through this process. You should expect them to be involved in selecting and briefing reviewers, advising on matching staff to reviewers, monitoring completion rates, advising on complex and difficult circumstances along with future planning considerations.

# Preparation for the Performance Development Review

There are six main activities you will need to complete in the months running up to the PDR and Job Chat period. Normally this should happen during the Autumn/Spring Terms.

## 1 Identifying a PDR co-ordinator

A co-ordinator should be appointed for the PDR and Job Chat process, to implement this across the school/unit. The role of the co-ordinator will be to:

- Co-ordinate the setting of reviews
- Circulate the paperwork to all staff and handle enquiries
- Monitor the returns and chase up, using the reports sent by HR systems

Report on annual uptake figures for the school liaising with the HR Partner

## 2 Select the 'reviewers' for your area of responsibility

The expectation is that reviewers, in the main, will be those with already defined responsibilities for staff. If you are a line manager, conducting a review with your staff is a core requirement of your role.

It is suggested that each reviewer should normally review no more than 8–10 staff to ensure that enough time can be dedicated to such an important activity.

Where it is necessary to identify additional colleagues to be reviewers, it is important that these colleagues have both the skill and interest to carry out PDRs or Job Chats effectively. Whilst they will receive specific training for this activity, a natural inclination to support colleagues in achieving their potential both in their role and careers more broadly is a good starting point. It is important to recognise that in order to develop and improve, challenging conversations have to take place.

The expectation is that this will be an on-going commitment to ensure a level of continuity for colleagues. Careful consideration should be given to how you select reviewers for your area. To help you, a 'Guide to being a reviewer' has been produced.

## 3 Training for PDR and Job Chat reviewers

All reviewers must have completed the necessary training ahead of the review period starting. This will be a mandatory requirement; therefore planning well ahead of time is advisable. Training will be available through the CQSD programme.

## 4 Briefing reviewers

To ensure consistency, it is important to brief your reviewers as a group, setting out your expectations for the PDR and Job Chat discussions. The briefing could include details on the following areas:

- Priorities for the work area for the next 12 months, allowing individuals to consider objectives in line with this
- University priorities
- Compliance requirements (Health and Safety, Data Protection etc)
- Staffing related priorities (succession planning; health and well being; strategic development needs)
- Process expectations (level of preparation; feedback; contact with reviewee)

Depending on your role and the normal practice in your area, varying levels of preparation and consultation will be required in order for you to provide this briefing. It is suggested that early discussion with your Dean or Head of Service and HR Partner on this is important.

## 5 Matching staff to reviewers

Once you have identified your reviewers and the necessary arrangements are in place for training, you can proceed with matching staff with reviewers.

Consideration should be given to various factors including the potential benefits and value of each match as well as circumstances which may make a review relationship more difficult or beneficial.

The expectation is that staff will only be able to request an alternative reviewer where exceptional circumstances determine that this is both necessary and appropriate. This request should be made to the Head of School/Unit in the first instance.



## Performance and Development Review Cycle

### Staff briefing and communication

All staff within the work area should be informed of the timetable for the review activity, along with any expectations in terms of preparation for review discussions. Normally this communication will happen by email, however local practices will prevail.

A quick 'Guide to preparing for your PDR discussion' is available for colleagues to consult. Likewise, a similar document for those who will have a Job Chat is also available.

### Individual notification of PDR or Job Chat Reviewer

Each member of staff should be informed of who their reviewer will be. It should be made clear that requests for an alternative will only be considered in exceptional circumstances. It is expected that individuals will have a minimum of two weeks notice of the review meeting in order to prepare.

### Monitoring progress

It is important to monitor progress of PDR and Job Chat completion throughout the review period to ensure that the activity stays on track.

Each area can determine locally how best to manage and organise this. The University requires all eligible members of staff to take part in this activity on an annual basis. A definition of eligible staff can be found in the Scheme Guide.

### Second reviewer

Each area will decide whether the use of the 'second reviewer' is appropriate or not. Where this is in use the Head of Unit who is responsible for leading the Review activity will read and comment on all the reviews for their area. The purpose of this is for information and to identify themes and matters of importance which may require further consideration.

## Review of the Performance Development Review exercise

### Discussion with each reviewer

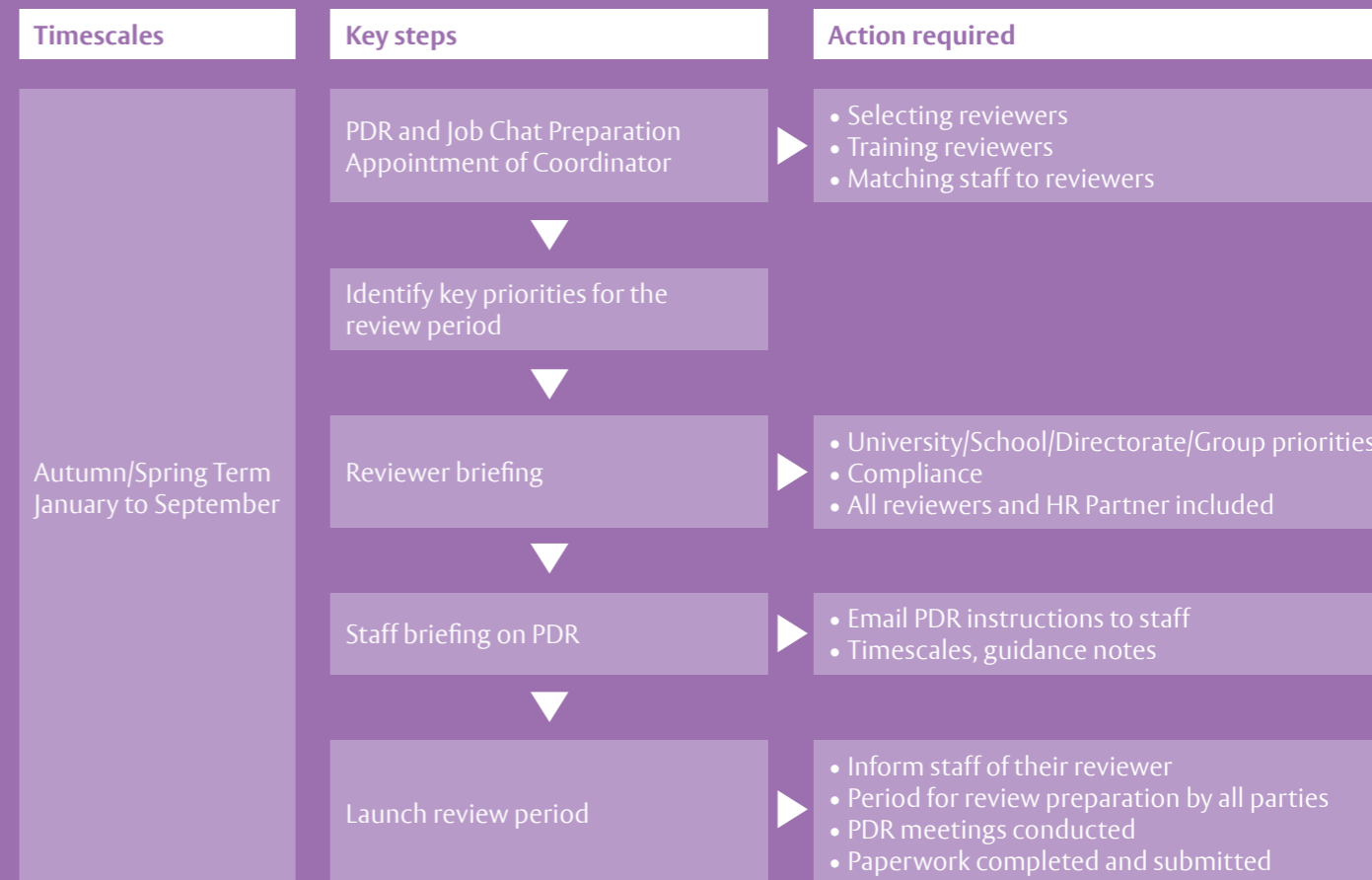
Following the completion of the PDR or Job Chat discussions, the Head of School, Function or Section should gather feedback on the review exercise. Particular attention should be given to the following areas:

- Any cases requiring prompt specific action (concerns around performance, working relationships, health, retention etc)
- Future cases for promotion, personal titles, regrading or reward
- Significant development requirements
- Learning and development needs
- Succession planning issues


Reviewers could convey this verbally or in a brief email or report.

Your Dean, Head of Service will use this information to feed into normal University planning and management activities to ensure that the necessary action is taken.

## PDR Planning flow chart



## PDR guide for managers

 For more information, please contact:

### **Human Resources**

University of Reading  
Whiteknights House  
Reading, RG6 6AH

[hropertions@reading.ac.uk](mailto:hropertions@reading.ac.uk)  
Tel (0118) 378 8751

[www.reading.ac.uk/hr](http://www.reading.ac.uk/hr)

Every effort has been made to ensure that this information is accurate, reliable and easy to understand. This booklet is a guide and does not constitute terms and conditions. If you would like to read more about working for the University please visit the Human Resources Website at [www.reading.ac.uk/hr](http://www.reading.ac.uk/hr)