

Performance and Development Review

Frequently Asked Questions from Reviewees

1) How long will my P&DR take?

There is no set length for a P&DR meeting. The duration will depend on a range of factors including the complexity of the role, the degree of change affecting the role and the experience of the person in the role. It is possible though rare for a P&DR to be fully completed in 30 minutes, whilst others take 90 minutes. An hour is probably the average duration.

2) How frequently will I have a P&DR?

You will have at least an annual P&DR and it is recommended that interim reviews should take place to ensure that the actions that were agreed at the P&DR are being taken forward and that any obstacles to achieving the set objectives are addressed as soon as possible. Frequency of interim reviews could potentially be every 3 or 6 months.

3) Do I have to have a P&DR?

Your manager must offer you the opportunity to have a P&DR. The normal expectation is that all staff take part in a P&DR. If there is some reason why you do not wish to have a P&DR meeting, you should make your reviewing manager aware of this together with your reason for declining the P&DR. Your manager will then take the opportunity to discuss your performance and development in a regular meeting you have with them. The purpose of the P&DR is to help you be successful in your job and it is an opportunity to discuss how the University can support you in this, so it should be of benefit to all.

4) Who manages the P&DR process?

The senior management teams in Faculties, PSS and other areas of the University have the overall responsibility for ensuring that P&DRs are offered to all staff within their area of responsibility. The P&DR process is “owned” by University Human Resources, who will review the practice, documentation and effectiveness of P&DRs from time to time.

5) Who will contribute to or see my P&DR?

It is good practice for your reviewer to consult with colleagues with whom you interact in their preparation for your P&DR meeting. You also may wish to provide details of any feedback received to inform your review. Your reviewer will tell you who they plan to consult in preparing for your P&DR.

6) Who will see my P&DR?

Your Senior Reviewer has access to your P&DR to ensure it has been completed, suitable objectives have been set, development needs have been discussed and the overall P&DR is of a good standard. Some (non-sensitive) elements of your P&DR will be shared with other parts of the University to help

with the achievement of your objectives, e.g. requests for any changes in teaching allocation or development needs to plan training etc.

7) I don't have access to a computer. How can I complete my P&DR documentation?

Paper formats of all P&DR documentation are available. Please ask your manager for copies.

8) What resources are available to support me in preparation for my P&DR?

An online system has been designed to support the new P&DR process; however it is still possible to complete all documentation in a paper format.

An e-Learning resource has also been developed to answer your questions and to guide you through the process.

It's also important to remember that your manager has received training in the new P&DR process and will be able to answer questions that you might have.

9) What must I do in advance of my P&DR?

In order to have an effective P&DR you should;

- Ensure that you are clear about the P&DR process.
- Consider your future work aspirations
- Review your previous years P&DR (if applicable)
- Complete and submit your draft P&DR form usually through the online P&DR system, or on paper where necessary.
- Review and complete your additional preparation form, where appropriate.

10) Can I partially complete and save my P&DR documentation online and go back to it to complete it at a later date?

Yes.

11) I'm an academic member of staff. How will my performance be evaluated?

Your performance will partly be evaluated using a range of metrics. Local discretion will be applied with regards to which metrics are used in which Faculties and Schools.

You are also able to attach a C.V. and other relevant documents to your online P&DR record.

12) As an academic my research aims do not fit into the annual review period. How can this be measured?

Objectives do not need to be limited to a one year period. If the objective covers more than one year, both you and your reviewer should agree key milestones during the review period. This will provide evidence of progression to a longer term objective. Research objectives covering a 3 year period will be set wherever possible.

13) I am a clinical academic. I need to provide a printed copy of my P&DR and preparation form to my Trust manager as well as my manager at the University. Can I print a copy of the P&DR form as well as save an electronic copy?

Yes.

14) What will happen if I do not meet my objectives?

It is recommended that you and your manager have regular discussions regarding progress towards meeting your objectives so that the chance of not meeting them is minimised. You will then be able to discuss any obstacles to achieving them that you might face. There may be legitimate reasons for not achieving the objectives, for example;

- The objectives may no longer be relevant;
- Circumstances beyond your control, for example illness
- A gap in skills which needs a development intervention.

If you do not meet your objectives, your Reviewer will explore the reasons for this when you meet.

15) What will be the outcomes of my P&DR?

The outcome of the P&DR process must include a written record, produced by the Reviewer within three weeks of your P&DR meeting. This will include;

- A summary of your performance since your last review (or from the date you started work with the University, if this is your first annual review).
- Specific targets, work based objectives or performance standards for the next period. These should be linked, where appropriate, to the University's strategic objectives.
- Agreed learning and development objectives and associated actions to further develop current performance, support achievement of future goals.
- Any actions relating to future career development and role enhancement.
- A record of any other actions that have been agreed between you and your reviewer to support you in your job.

It is important that the P&DR record specifies who will take action and the timescale involved - action may be taken by either the reviewer or the reviewee. This will help to avoid confusion later.

16) Who is responsible for following up on any training or development needs that are identified in my P&DR?

Both you and your reviewer are responsible for ensuring that the actions identified in your P&DR are followed up.

17) Who should conduct my P&DR?

Your review will normally be undertaken by your line manager. Where a line manager has responsibility for a large number of direct reports, they may delegate responsibility for P&DRs to other managers or

senior colleagues who have sufficient knowledge of your work. If you have two or more line managers, they should decide who is best informed about your work to carry out your P&DR and they should both contribute to feedback on your performance.

18) What will happen if I object to the choice or person who is to act as my reviewer?

You should raise your objection with your Senior Reviewer stating the reasons for your objection. They will try to find a resolution with you.

19) How does P&DR relate to University Disciplinary Procedures?

P&DR discussions are entirely separate from the University's disciplinary procedures and policies. These are covered by separate guidance. Issues about developing performance can be raised in your P&DR. However if your work performance consistently falls short of requirements, this would be dealt with in line with the relevant disciplinary procedures.

20) I have just started work at the University. Will I have a P&DR whilst I am in my probationary period?

There are separate arrangements for reviewing your performance whilst in your probationary period. Once your probationary period has been successfully completed the next review you have will be in the form of a P&DR.

21) I don't agree with the content of my P&DR. What can I do?

The aim in all P&DRs is to reach agreement between you and your reviewer on what has happened prior to the review and on plans for the future. In rare cases, where this is not possible you or your reviewer can refer to the senior reviewer to seek a mutually acceptable solution.

22) I have no desire to progress my career. Should I still have a P&DR?

Yes, as your P&DR is about your performance and development in your current role. Your P&DR can also be used to identify training needs that will help your work more safely or effectively.

23) How will the quality of P&DRs be assessed.

This will be done in two ways. Firstly the University has introduced the role of senior reviewer to check on quality of PDRs and secondly you will be surveyed to ask your views of the process.

24) I have a question that hasn't been covered in these guidance notes. Who can I ask for help and advice?

In the first instance you should normally contact your reviewer or senior reviewer. If they aren't able to help you, depending on the nature of your query you may need to contact IT Services (system issues), HR (policy or best practice questions) or the Staff Learning & Development team (for training issues).