

Performance and Development Review

Frequently Asked Questions from Reviewers and Senior Reviewers

1) Do I have to offer a P&DR to all my staff?

Yes, it is mandatory that you offer a P&DR to all of your staff.

2) What must I do if my staff refuse to have a P&DR?

Please note this on their P&DR record in the online system together with the reason for refusal. This will contribute to reporting within your area. Even when a member of staff refuses to have a P&DR you have a responsibility to discuss their performance, development, any health and safety and equality and diversity training with them. For this reason there will be a mandatory meeting between the line manager and individual but P&DR records will not be completed.

3) How often must I offer PDRs?

A full P&DR must be offered to every member of University staff every 12 months. It is good practice to review progress towards agreed objectives at least every six months in order that any blockages to successful completion of objectives are removed where possible.

4) What steps must I take to complete the P&DR documentation online?

Please see [P&DR IT User Guide](#) for the steps you need to take to set up and conduct P&DRs in either online or offline format.

5) What must I do if the management relationships are incorrect in the online system?

Reviewers and reviewees will be able to correct relationships in the system.

6) Who can run P&DR reports from the online system?

Reports can be run from the online P&DR system by the Reviewer, Senior Reviewer and Administrator.

7) Can previously completed paper copies of PDRs be uploaded?

No

8) What should I do if my staff do not use computers?

You should print off paper copies of the blank P&DR form and offer assistance where necessary to complete it. After the P&DR is completed, agree the P&DR record with the reviewee and upload the completed P&DR form to the system.

9) I can't access the online P&DR system. What should I do?

In the first instance contact the IT Services helpdesk on extension 65544

10) What metrics can I use to judge academic performance?

Local discretion must be applied with regards to which metrics are used in Faculties and Schools. These are reflected in the local Academic P&DR Preparation Form.

11) What are suitable objectives?

Any objectives that you set and agree should be SMART (specific, measurable, achievable, realistic and timely). They should contribute to both your local strategic plan and (not necessarily directly) to the wider University's strategic aims and objectives.

12) What do I do if it's impossible to set suitable objectives that can be completed within a 12 month reporting period?

Objectives do not need to be limited to a one-year period. If an objective is for more than one year, both you and your reviewee should agree key milestones during the review period. This will provide evidence of progression to a longer-term objective. Where appropriate research objectives will be set over a three-year period.

13) Can I use the P&DR process as part of, or in place of a Disciplinary Procedure?

No. The P&DR process is not part of the University's formal or informal disciplinary procedures and policies. These are covered in separate guidance. Issues about developing performance can be raised in the P&DR with your reviewee however if their work performance consistently falls short of requirements, this should be dealt with in line with the relevant disciplinary procedures. HR can advise on the application of these procedures.

14) I have previously been trained to conduct P&DRs. Must I be retrained in the new system?

Yes, as the approach to P&DR is being overhauled to ensure best practice P&DRs take place across the whole University.

15) Where can I access the online documentation?

2 places offer the main documentation:

Within the P&DR system

Within the P&DR pages in the HR part of Staffnet

16) Can I complete the online record of the P&DR discussion as it is taking place?

Although it is possible, it is not recommended. Your attention should be focussed on the reviewee not on what you are typing. You should factor in enough time after the meeting to input any notes that you have made.

17) Can I print off a copy of the form and preparation form to use in the meeting?

Yes

18) How soon must I complete the P&DR form for the reviewee to see?

You should aim to complete and return the P&DR documentation to the reviewee within 10 working days.

19) What should I do if my reviewees are not meeting their previously set objectives?

You should explore with your reviewees the reason(s) for not meeting their previously agreed objectives and ask whether there is anything that you can do as a reviewer to assist. The P&DR meeting should not be the first time that you know objectives are not being met. Discussions regarding performance should be ongoing.

20) What arrangements should I make for employees in their probationary period?

Separate arrangements are in place to monitor and review performance during probationary periods. Once the probationary period has been successfully completed the next review will be in the form of a P&DR.

21) Can I consult with colleagues when preparing for a review?

It is appropriate to canvas opinion on performance and to discuss potential future objectives with key contacts of the person being reviewed. Where you intend to do this the reviewee must be made aware of this and have an opportunity to raise any issues.

22) What should I do if my reviewee does not want me to be their reviewer?

You should attempt to explore the reasons why this is the case although this may not always be possible. If you are not able to resolve the issue, or allay any concerns, you should inform the reviewee that they must raise their objection with their Senior Reviewer, stating the reasons for their objection.

23) Who is responsible for identifying and following up on training identified?

Both parties are responsible for ensuring that the actions identified in a P&DR are followed up.

24) What must I do if my reviewee does not agree with the content of the review?

The aim in all P&DRs is to reach agreement between you and your reviewees on what has happened prior to the review and to plan for the future. In rare cases where this is not possible, both you and the reviewee can ask for the senior reviewer to get involved to seek a mutually agreeable solution.

25) What is the role of the Senior Reviewer?

As a senior reviewer, you are required to check that PDRs are being offered to all staff within your area. You also have access to the PDRs of all the staff within your area of work. You are required to review an appropriate sample of reviews and check so far as is possible that relevant training needs are being identified and suitable SMART objectives are being set.

Reviewing these items will help to inform your decision as to whether the P&DR is of a suitable quality.

26) What should I do if I don't believe the P&DR I am quality checking is of a good standard.

In the first instance you should explore your reasons for concern with the relevant reviewer. You should also mark the P&DR as being "on hold" until your concerns have been dealt with.