

Staff Training and Development Unit

Performance and Development Review – Reviewee Checklist

Aim of the PDR

Your Review is an opportunity for Reviewees to:

- have a two way discussion about themselves and their role at the University
- give and receive feedback
- review their objectives and note their achievements
- identify their strengths and any areas for improvement
- identify and agreed objectives for the next year
- discuss and identify their training and development needs
- influence the way things are in their immediate work place and put any new ideas forward
- raise any concerns, worries, problems about their job or work
- have an opportunity for uninterrupted, quiet and confidential time with the Reviewer

Your Review is not:

- part of the disciplinary process
- a substitute for good day to day management

Your Review is an opportunity to look back in order to move forward and gives an appreciation of what has already been achieved with plans for what you would like achieved in future. The overall purpose is to help the Reviewee to be successful in their job.

Preparation

In order to get the best out of your Review, you should prepare well. You should consider the following:

- Have you agreed the time, date and place of your Review with the Reviewer?
- Do you have a copy of the preparation documentation?
- Have you considered your job description?
- Do you need to look at any other information e.g. staff development opportunities?
- Have you prepared discussion points on past objectives and how you have performed against them?
- Have you considered your achievements?
- What training and development needs do you think you have?
- What new ideas do you have about your work?
- Do you have some feedback to give your Reviewer?
- Are you going to ask for any feedback from your Reviewer?
- Are there any problems or concerns you want to raise?

- Is there anything else you want to discuss?

Preparation documentation should be submitted to the Reviewer at least 1 week prior to the Review. Please note that completion of a preparation document is optional.

PDR Discussion

Here are some ways to help your Review go well:

- Be well prepared and clear about what you want to say
- Put your points across in a clear, positive and confident manner
- Listen carefully to what your Reviewer has to say in response
- Through two-way conversation, ask for what you want, share ideas and suggestions, and plan a way forward together with your Reviewer
- Ask as many questions as you need to, don't be afraid to ask for further clarification
- If you want to take notes, do so.
- At the end of the meeting, check you have understood everything and that you agree and understand future plans and objectives

Possible outcomes of a Review (if appropriate)

- Amend job objectives
- Enlarge job
- Visit another department
- Read a book/journal etc
- Attend a course
- Observe an activity
- Shadow somebody
- Obtain secondment
- Join a working party
- Reduce responsibilities
- Clarity career path
- Review structure
- Manage a project
- Review processes
- Increase resources
- Obtain additional equipment
- Give support
- Increase communication
- Computer based training
- Mentoring
- Arrange a job swap
- Have something delegated
- Get involved in charity/voluntary work