

Staff Training and Development Unit

Performance and Development Review – Reviewer Checklist

Preparation

- Decide whether standard paperwork or some variant to be used, consult in department as appropriate
- If standard paperwork to be used ensure right version
- Ensure adequate notice of PDR Discussion – a minimum of 2 weeks' notice
- Issue Reviewee Preparation Form – ask Reviewee to prepare brief notes
- Use version of form to prepare as reviewer – reflect on:
 - Achievement of previous objectives
 - General standard of work performance and specific examples
 - Future work plans and objectives
 - Training and development needs
 - Other action to develop work and potential of member of staff
- Ensure time, space, location and privacy for PDR discussion
- Receive Reviewee prep form back before discussion if they wish and construct agenda
- Clarify reviewer authority and scope for committing resources – for example approval to attend Conferences and external training events
- Ensure familiarity with University facilities for training and development, supporting personal processes etc wellbeing
- Consult others with Reviewee permission where required, if review has other reporting lines

PDR Discussion

- Ensure structure to discussion – clear beginning, middle and conclusion/end
- Consider structure before start – either based on Reviewee prep form, job description and objectives, or looking back, considering present and looking forward approach
- Focus on joint problem solving and agreed actions throughout discussion
- Reviewee should be doing majority of talking
- Ensure positive climate, focus on positive aspects but deal with areas for development in direct and unambiguous way
- Stay calm and objective if criticised, discuss actions to resolve situation
- Take structured notes of relevant points, to dos and actions
- Ensure responsibility for taking forward actions shared between Reviewer and Reviewee

Review Skills and Approach

- Ask open questions to get Reviewee talking
- Demonstrate appropriate listening, avoid interruptions and over-talking

- Ensure open and encouraging body language and immediate environment
- Summarising and reflecting at various stages to show understanding and support structure
- Ensure feedback specific, actionable, de-personalised, balanced, constructive based on examples and focussed on improvement and development

Completing the Documentation

- Not form filling exercise
- Bullet point summaries rather than long narratives
- Focus on agreed actions and by when
- Write up record – maybe ask Reviewee to review draft
- Make any change to draft and ask Reviewee to sign off draft, ensure they retain copy
- Pass completed record form to senior manager for any further comment or review
- Ensure any further comments brought to attention of Reviewee
- Ensure protocols around confidentiality observed
- Aggregate any training and development needs into departmental or team plan as agreed within area

Review and Follow Up

- Ensure regularly reviewed – 3/4/5/6 months? – agree in department if appropriate
- Agree review dates at time of PDR discussion
- Be clear about purpose:
 - Ensure agreed actions being carried out
 - Review performance against objectives or standards
 - Identify any additional objectives, training needs, support required and so on
- Make very brief meeting note of review and ensure Reviewee gets copy