

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?

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 refer to the P&DR IT User Guide for the steps you need to take to set up and conduct reviews in either online or offline format.

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

Please inform the P&DR Administrator who will be able to correct relationships in the system. Details of your local P&DR administrator can be found here <https://www.staffnet.manchester.ac.uk/human-resources/current-staff/career-development/p&drs/>

6) What information can be obtained from the online system?

The system provides details of the number of P&DRs being undertaken and their status. It does not provide details of the contents of individual P&DRs

7) Is the system compliant with GDPR ?

Yes

8) What should I do if my staff do not have PC access?

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 system. What should I do?

In the first instance, check that you are using duo log in or VPN. If this does not resolve the issue, contact the IT Services helpdesk on extension 65544

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

Faculties have discretion with regards to which metrics are used for academic performance. These are included in the supplementary P&DR documents produced by each Faculty.

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 Our Future - the University's Values and Strategic Plan. <https://www.staffnet.manchester.ac.uk/our-future/>

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. Your local HR Partner 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?

Training is not mandatory, however we advise reviewers and senior reviewers to undertake this to ensure best practice P&DRs take place across the whole University. It is also recommended that you refresh your P&DR reviewer training every three years.

Training for Academic / Research reviewers can be found here

<https://app.manchester.ac.uk/TPDR05e>

Training for PS reviewers can be found here

<https://app.manchester.ac.uk/TPDR01e>

15)Where can I access the online documentation?

Two places offer the main documentation: Within the P&DR system and within the P&DR pages in the HR part of Staffnet

<https://www.staffnet.manchester.ac.uk/human-resources/current-staff/career-development/p&drs/>

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 agreed 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?

In some cases 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 following up on learning and development 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 input 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.

Document Control Box	
Title	Performance and Development Review Frequently Asked Questions from Reviewers and Senior Reviewers
Implementation Date	February 2020
Version	1.1 Reference to Our Future – University Vision and Strategic Plan Inclusion of web link to P&DR reviewee training Inclusion of web link to Our Future web site Inclusion of web link to P&DR training for PS staff Inclusion of web link to P&DR training for Academic / Research Staff Inclusion of question re GDPR compliance
Document Owner	Staff Learning and Development – Directorate of Human Resources