

Performance and Development Review

Guidance notes for

Reviewees, Reviewers and Senior Reviewers.

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1. The Purpose of Performance and Development Review (P&DR)

P&DR meetings are the single most important way in which the University ensures that each and every individual (or team in some areas) is able to perform to the best of their abilities and fulfil their professional aims and ambitions.

The philosophy behind our approach to P&DR is that:

- People want to do a good job, to get satisfaction from their work, and to be appropriately recognised and rewarded in return.
- People want to feel that they are making progress and learning new things at work.
- People want to be managed by someone who has a genuine interest in their career and their development.
- Regular, honest and open communication is the key to achieving understanding, respect and progress at work.
- More is usually achieved by (wherever possible) playing to, and developing a person's strengths, rather than by asking them to do more of things they are less good at.
- Being effective and enjoying work is often to do with **how** we do the job as well as **what** we do, so P&DR looks at our 'soft skills' (or 'behaviours') as well as the tasks we are doing and the results we are trying to achieve.

2. How and why P&DR changed in response to staff feedback.

Staff survey feedback provided a series of very clear messages to the University about previous P&DR practice. Though there were some differences between staff groups and different parts of the organisation, the same key points kept coming up from many parts of the University.

"It doesn't happen". Many people were unhappy because they did not have a P&DR. So P&DR will now be offered to every eligible* member of staff. In the majority of cases where P&DRs have not happened to date, it seems this has been down to managers not organising them, rather than individuals declining to have the discussion. For this reason ultimate accountability for all appropriate reviews taking place will reside with the reviewer.

*There will be situations in which a P&DR is not needed or appropriate e.g. very recent starters, people on long term absence or members of staff employed temporarily from an employment agency.

“It's not much use”. A number of people who did have a review, felt that it achieved little. Large numbers of managers and senior reviewer have been retrained in the use of P&DR, with a focus on making it a valuable use of everyone's time. Reviewees will have access to P&DR training via an eLearning module. This may be accessed from here <https://app.manchester.ac.uk/TPDR02e> The training provides hints and tips on how to make our own reviews go well. Every review meeting will, as standard, look at development needs, career/job aspirations, scope for advancement and contribution to Our Future, the University's Vision and Strategic Plan.

“My manager has changed and we are starting from scratch”. By moving P&DR onto an electronic platform we are able to ensure that a change in management does not mean losing all the historical reviews. This will help a new manager pick up where the previous one left off. To make this possible, for future P&DRs we are removing the old restriction on P&DRs being private between the people directly involved in the discussion when the review took place.

“There is no follow through on agreed objectives and actions”. This is partly due to the confidentiality of the P&DR process. Information from the reviews will now be shared, in a limited way, with other parties, to help make sure things happen as a result of the review commitments. This will include, for example, requests for development being shared with those responsible for planning and delivering the training, and (for academic staff) information on requested changes in teaching allocation being provided to the people responsible for allocating teaching. Reviewees will be made aware of any other plans to share P&DR contents and have an opportunity to have any objection considered.

“There is too great a focus on the short / medium term "tasks" that need to be completed, whereas I want to think about my career and my future and agree and plan moves to fulfil my aspirations”. It sometimes feels easier as a reviewer or reviewee to focus discussions on the everyday “stuff” of our jobs. In this way the review meeting becomes a comfortable extension of a discussion we might have on any other day of the year. However the P&DR is a chance to really step back from the role and to review how things are progressing more generally and whether the person is moving in the direction they and their manager wish them to. This is why both reviewer and reviewee need to give some thought to the bigger picture in advance of the review meeting.

“My manager didn't really seem to know how to approach the discussion. They told me what they wanted”. Whilst there is a place for *some* management directed decision making in P&DR meetings, especially where the standard of job performance is falling below the expected level, managers running P&DRs will increasingly seek to *agree* with reviewees what the priorities are for job performance and professional development, rather than impose objectives.

“The focus was on outcomes without looking where I want to be and how I am going to get there”. Your review should be as much about **how** you are going to do things, as about **what** you are going to do and when. Reviewers and reviewees share the duty to ensure that when a task or outcome is agreed on, that the “how” questions are also asked: How am I going to get the skills or experience to do this? How do we want this to be done? How will I know if I am going about it the right way? How will we raise any concerns or issues as we progress?

3. Who does what? Roles of the Reviewee, Reviewer and Senior Reviewer.

Reviewee.

As the Reviewee you are the person the P&DR meetings should focus on: your performance, your areas for development, your aims and ambitions, your questions and concerns. No matter how senior or junior we are in the organisation, we are all reviewees and have our own P&DR meetings – even the President has P&DR meetings with the Chair of the University Board of Governors.

Because the P&DR meetings are focused on reviewees, there is a key responsibility on each of us to prepare well for our own P&DR meetings. No longer can we **solely** expect managers in these meetings to tell us how we are doing – they will expect us to tell them what is going well, what is going less well, and where things could benefit from any change, additional support and so on.

Depending on how closely we work with our reviewing managers day to day, we will probably need to bring some information or examples to support our own views on how things are going.

As reviewees we should reflect on the time since our last P&DR meeting, and on how things have gone since then. It will be very important to review progress against any performance or development objectives or actions that were agreed previously and how far they have been met. Understanding **why** intended things have or have not happened will be central to making more progress in future.

Reviewer.

The primary role of the reviewer is to set up and conduct the P&DR meeting in a way that enables reviewer and reviewee to get to the core issues relating to the reviewee's work. This will be achieved by: preparing thoroughly, setting expectations of the reviewee in advance e.g. do you want to see any notes before the meeting?, setting and keeping to a time, duration and location for the review meeting, seeking the views of others who might have different perspectives on the person's performance.

The reviewer needs to add an appropriate level of challenge to the reviewee, to ensure both parties have as objective a view as possible of the things that are going to be worked on in the future, and how.

Senior Reviewer.

In this role, the Senior Reviewer will be responsible for oversight of the effectiveness of the P&DRs carried out in their areas. A standing objective for anyone with reviewer duties will relate to the quality and completeness of the P&DRs they are responsible for, e.g. "I have carried out full and interim (where needed) P&DR meetings with all colleagues assigned to me and these have been conducted in line with P&DR best practice".

The Senior Reviewer will be the person to be approached by the reviewee if they have any concern or complaint about their P&DR. The Senior Reviewer will look into the concerns and act as appropriate to resolve any issues.

4. Measures and Evaluation of Performance.

Each part of the University will agree what measures will be referred to in informing any review of individual performance. Information relevant to the measures applicable to your role will be included in a preparation form. The correct preparation form for your area will link to your P&DR form in the online system.

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