Why are we here?

- Clarify the purpose and process of PDR
- Find out what’s in it for you
- Develop a shared understanding of your role in PDR
- Explore your role at each stage of PDR and what good practice looks like
- Explore some key skills
Quick quiz …

1. What does the P in PDR stand for?

2. What percentage of the University’s departments (academic and admin) use PDRs?

3. What percentage of organisations in the UK use an appraisal system of some kind?

4. What's the difference between an ‘appraisal’ and PDR?

5. Why should anyone bother with PDR?

6. What do UK workers say they want more of at work (clue: believe it or not, it's not ‘money’!)

Answers to questions …

What does the P stand for …

% of departments using PDR …

% of organisations in UK using appraisals …

Difference between ‘appraisal’ and PDR …

Why should anyone bother …

What do UK workers want more of at work …
The P …

- Personal
- But also covers ‘professional’ and ‘performance’
- Focus is on the person (the ‘reviewee’) and their development
- Performance comes into it, as PDR looks at achievements and objectives, but performance ‘issues’ are managed via other routes as and when they occur.

How many departments use PDR?

- About 40% (up to 70% if counting those who say they do PDR but not annually or for some staff only)
- Growing quickly.
- Academic staff have their own appraisal system
What % organisations in UK have appraisal systems

- About 95%

Appraisal v PDR

Appraisals tend to focus on:
- Performance only
- What the manager thinks of you
- Targets
- The past
- Judgement
- Reward

PDR focuses on:
- Development and performance
- What you and your manager think
- Needs
- The future
- Evaluation and exploration
- Opportunity
PDR: Why bother?

- Rare that staff get the chance to focus on themselves at work
- People who set goals are more likely to achieve what they want to achieve.
- Gives staff a voice
- Promotes better relationships
- Provides time and space that easily gets lost in the hurly burly of work
- Links individual objectives with team and department objectives
- Clarifies priorities

What do UK workers say they want more of?

Feedback!

How am I doing?
‘What’s in it for you?’

- Ensures you know what the priorities are
- Ensures you have clear goals
- Lets you know what your manager thinks you are doing well/less well
- Helps you identify any development needs you might have and how you might address these (makes sure you are up to date and prepared for the future)
- Your manager gets to know you better (and you them!)

PDR: the downside

- PDR is an opportunity – no one can make you take that opportunity or make you make the most of it
- Can make things worse if done half-heartedly
- Not always easy to set objectives and to give and receive constructive feedback.
- It takes a little bit of time and thought to do well – but not as much as you might think!
What about those who are not after a career?

- Not just for those who seek promotion or a career – development and learning are needed all the time - jobs never stand still!
- PDR a good time to think about what is working well, and what is working less well at work and to talk about this
- You are more likely to know how to improve the service your team/ area gives – PDR a good time to discuss this
- A chance to hear about any changes on the horizon and to talk about any priorities

PDR: the process

- Preparation
- Review meeting
- Follow up
Stage 1: Preparation

Your manager does this

- Agree time, date and place
- Send reviewee Form A to prompt self-evaluation, plus any other useful docs such as Job Description
- When Form A returned, review it and add anything they feel is missing that they want to discuss
- Send amended Form A back to reviewee (or discuss any changes)

You do this

- Agree time, date and place
- Gather any docs you need such as copy of last year’s review
- Draft Form A and send it to manager
- Look at any amendments suggested by manager in final preparation for review meeting

Stage 2: The review meeting

Your manager does this

- Makes sure there is a place available for a confidential, uninterrupted meeting
- Listens and gives comments
- Discusses and seeks agreement
- Clarifies priorities
- Helps you see things from their perspective
- Helps you identify objectives and development needs
- Offers support for development
- Makes notes
- Completes paperwork

You do this

- Participate fully
- Share your ideas and thoughts
- Reflect on feedback
- Discuss and seek agreement
- Agree objectives and development needs
- Suggest ways you might meet your development needs
- Sign the paperwork as a record of what was agreed
Records of the reviewee meeting.

- A form (often called Form B) is used to record what was covered and agreed in terms of objectives etc.
- Manager makes brief notes during meeting
- Manager completes record after meeting and then asks you to sign it
- You get copy to keep, copy goes on your Personnel file
- Form C (if used) records what development agreed and is sent to administrator by manager.

Stage 3: Follow up

- The **most important stage**
- Keeps the objectives and the development ‘live’
- Via regular, short one-to-one meetings, year round
- Be ready to update your manager on how things are going and if you feel any changes are needed to your objectives/development
- Keep a note of how you are doing against your objectives and what helped/hindered – useful for next year
Useful skill 1: writing objectives

**Specific** – not vague, focused on a specific aspect of work

**Measurable** – so you know when it has been achieved

**Achievable** – stretching but not too challenging

**Relevant** – related to the key area of work

**Time-bound** – has date(s) attached to say by when

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Useful skill 1: writing objectives

- An objective is simply something you want to achieve by a certain date
- Try not to be vague, such as ....
  
  “I want to improve my writing.”
- Instead, try to pin down exactly what you want to achieve ....
  
  “I want to reduce the number of spelling errors in my writing to zero by the end of March by making better use of the spell checker.”
Useful skill 1: writing objectives

- If you are not sure what to write, look at the key things your job description says you have to do. What do you want to achieve against each of these in the coming year?

- You might have a ‘development objective’ such as “To qualify as a first aider First Aid by the end of June.” Or, you might have an objective to produce something, such as “Produce a report on the use of IT in the team, identifying any new needs, by the end of October.” Or your objective may be to do with improvement, such as the one on writing on the previous slide.

- Some objectives may stay the same for more than one year if these are important to your role or if they were not completed last year.

- Normally, between 3 and 6 objectives are enough, but some people may have more if there are many parts to their job.

Useful skill 2: Giving and receiving feedback

For feedback to work for you, it needs to be:

- Timely – given soon after the performance, not weeks or months later (applies to both positive and critical feedback)

- Balanced – taking account of good and bad, in proportion

- Factual – not simply opinions or guesses

- Focused on something that can be changed

- Constructive – given with the aim of improvement and moving on

- Received – by you! Listen, and ask questions if you need to clarify what exactly it is you did well/less well. Don’t over-react
Feedback: kneejerk reactions

To critical feedback …

- **Justification**: "Well, that was only because …"
- **Denial**: "No, that’s not what I said ...."  
- **Explaining**: "Well, what I meant was ..."
- **Anger/hurt**: "If you feel like that about me ...."

How to receive critical feedback

- Most of us care about the quality of our work. Few people come to work to do a bad job, so critical feedback can take us by surprise.
- Don’t be surprised if you are surprised! It is human to have an emotional reaction to any perceived ‘criticism’.
- Recognise that it is something you did or didn’t do that is being discussed – not you as a person.
- Don’t rush in with a response, listen, ask questions
- Give your perception of events, correcting any inaccuracies, but don’t get into a spiral of justifying/denial etc.
- Keep it in balance – probably 99% of what you do is fine.
- Accept the past and focus on the future – how you can do things differently?
- Be positive.
Feedback: kneejerk reactions

To positive feedback ...

“Emm ...Well...Thanks ... That's nice ...”

Embarrassment

Self-deprecation

“It was nothing ... I was just lucky to get it right ...”

How to receive complimentary/positive feedback

- Acknowledge it – “That’s good to hear. I thought that went well.” “Good. I worked hard on that and it seems to have paid off.”

- Ask questions to make sure you know what it was that you did well (positive feedback can be vague!)

- Give due recognition to colleagues, but don’t underplay your role.

Accepting positive feedback graciously makes the giver feel good, whereas being self-deprecating or overly-modest can make them feel awkward and can reduce the likelihood that they will give it next time!