Why are we here?

- Clarify the purpose and process of PDR
- 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 ‘professional’ and ‘performance’!
- Focus is on the person (the ‘reviewee’) and their development
- Performance important, as PDR looks at what has gone well/less well and at objectives. But, PDR is not the place to raise performance issues. (Performance issues managed via other routes)

How many departments use PDR?

- About 40% (up to 70% if counting those who say they do PDR but not a 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 achievement
- What reviewee thinks
- 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 everyone is pulling in the right direction and knows what the priorities and goals are for your team and the department
- Provides your staff with clear goals and feedback - promotes sense of clarity and job satisfaction
- Identifies individual development needs and actions to lead to improvement
- Everyone knows where they stand
- Get to know staff – and they get to know you

PDR: the downside

- 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
- The tone and intention are critically important – can’t just ‘go through the motions’
PDR: the process

Stage 1: Preparation

You do 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 you feel is missing that you want to discuss
- Send amended Form A back to reviewee

Reviewee does this

- Agree time, date and place
- Gathers any docs they 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

- How long needed?
- Where and when?
- How to make it business-like but relaxed?
- What structure? (How to start, what next etc.?)
- Who leads it?
- Who takes notes?

Keeping a record.

- Form B used to record what was covered and agreed in terms of objectives etc.
- Manager usually makes brief notes during meeting (no need for lots of detail or verbatim account!)
- Manager usually completes Form B after meeting and then asks reviewee to sign it
- Reviewee gets copy to keep, copy goes on reviewee’s personnel file
- Form C records what development agreed for central collation.
Writing Objectives

Skills, Knowledge, Understanding → Behaviours → Outcomes

- Use IT
  - Know who is who in dept.
  - Understand a process
- Communication
  - Planning
  - Teamwork
- A report for a funding body
- Delegate packs for an event
- An effective PDR

SMART 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
Non-SMART

“Recommend equipment updates …”

“Improve your understanding of finance procedures.”

“Manage your assistant better.”

“Improve efficiency of delivery of delegate packs to event venues.”

Communicate better with project stakeholders.”

SMARTening objectives

- Denise’s job requires her to send out joining instructions for departmental events. Last year, there were 35 events involving 700 people in total. Evaluation forms showed that 10% of those who responded complained that their joining instructions contained mistakes. Often, these were just typos but, sometimes, the mistakes were more substantial and lead to participants arriving at the wrong time or even wrong venue.

For her PDR, Denise has suggested the objective:

*Improve my accuracy in joining instructions.*

Can you SMARTen it?
Feedback?

You are not good at joining instructions, are you?

Your joining instructions are the worst I've ever seen ….

You've made my life dreadful because you didn't bother checking …

We've had hundreds of complaints …

You're obviously just one of those scatterbrained people …

Feedback

To be effective, feedback 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
Stage 3: Follow up

- The most important stage
- Keeps the objectives and the development 'live'
- Via regular one-to-ones, year round