Personal development review scheme for Departmental Administrators

Guidance for Heads of Departments

This note provides the background to the PDR scheme for Departmental Administrators and invites Heads of Department to conduct an annual review with their Administrators. (Within the Humanities Division, the review is likely to be conducted by the divisional secretary, unless an administrator specifically seeks a review with the relevant faculty board chairman, and some administrators in MPLS may be reviewed by the divisional secretary).

All departments are expected to participate in the scheme.

The scheme is administered by the divisional personnel teams, who can also provide support in introducing the scheme:

- For the Humanities, and ASUC contact: Emily Sharp
- Social Sciences Divisions: contact: Sarah Oliver
- For the Medical Sciences Division and Continuing Education, contact: Helen Smith
- For the MPLS Division, contact: Colette O'Shaughnessy

What is the Personal Development and Review Scheme?

The PDR scheme is a framework within which an individual and his or her reviewer can regularly review and agree work objectives and the support needed to achieve those objectives. The focus of the scheme is an annual "PDR meeting" between an individual and their reviewer. For lead departmental administrators, the reviewer will usually be the head of department (except within the Humanities Division where they may be reviewed by the divisional secretary). During the meeting the individual and their reviewer will be able to engage in a dialogue to review the work carried out over the past year, to set objectives for the coming year, and to identify any support needs in relation to those objectives.

In most respects, the PDR scheme for administrators mirrors that for other staff. It recognises, however, that some lead administrators may not wish to discuss their broader career aspirations and prospects with their head of department. The scheme therefore allows departmental administrators to split this aspect of the review from the annual PDR discussion, and to use the annual career development survey to articulate their aspirations for development in and beyond the current role (e.g. through promotion to a higher grade or a change of post at the current grade, secondments, mentoring assignments, providing temporary cover, etc).

Main purpose of a PDR

The main purpose of the discussion is to enable the individual and their reviewer to step back from day-to-day pressures to reflect on the previous year’s achievements; and make plans for the next review period. It provides an opportunity to jointly:

- clarify the key purpose of the role and the administrator’s responsibilities
- give and receive constructive feedback on working relationships throughout the year
• identify objectives for the coming year and how these support the work of the department or faculty as a whole

• acknowledge and begin to address any difficulties; and identify and agree any further support needed in the role

• agree and plan any training and development needs within the role (or beyond the role, if the individual wishes to discuss this).

If an administrator does not wish to discuss their broader career aspirations beyond the role with their Head of Department, the annual career development survey, which is co-ordinated centrally by the Departmental Administration Project Officer, provides another opportunity for where administrators to indicate their plans for:

• potential contribution to projects and activities beyond the department or faculty, and/or
• broader career development as a departmental administrator at Oxford.

Preparation for the meeting

The administrator and their reviewer should agree a time and venue for the meeting, which should last around an hour without interruptions.

As preparation, the administrator should complete a self-review form (Form A attached) and share this with their reviewer around a week before the discussion. The reviewer is encouraged to consider the content of Form A and to return the form to the individual before the meeting with any additional comments or suggestions. Form A then provides the agreed agenda for the review meeting.

If appropriate, feedback may be requested in advance of the PDR discussion from other individuals, including, as appropriate, the divisional secretary, staff in the department, or other university staff (e.g. in the Finance Division, Personnel Services, Estates, Research Services, etc). This can usually be done by email; or through a brief meeting, using the structure of Form A as a guide.

Conducting the discussion

The following documents need to be available at the meeting:

(i) the Departmental Strategy or Plan as appropriate and any other relevant departmental or divisional objectives

(ii) a copy of the individual’s job description

(iii) the completed preparation form (Form A); and

(iv) the blank record of the PDR discussion (Form B).

Discussion during the meeting should then follow the outline of Form A.

• a review of the overall role in terms of its core responsibilities, objectives and demands
• discussion (with examples) of progress, achievements, and performance over the past year, including, where appropriate, a review of how far the previous year’s objectives have been met

• discussion of obstacles to the achievement of objectives

• agreement on future objectives in the context of the department’s (and, where appropriate, the division’s) objectives

• discussion of any training and support needs in relation to the existing role, including the desirability of taking time out from the role, including to contribute to the work of the broader University

• if wished, discussion of the administrator’s broader career aspirations beyond the department and how the department might support them in those aspirations.

After the discussion

During the discussion or immediately after it, the reviewer should record the main points or actions arising, using form B as a template, and invite the administrator to sign the record and include any additional comments. In the event of a difference of view, advice should be sought from the divisional personnel team in the first instance. Both the reviewer and administrator should sign the final record and retain a copy for use during the year in prompting reflection on progress against objectives. The reviewer should ensure that the annual HR assurance return records are completed showing that the PDR has taken place; and notify the divisional personnel team of any agreed training or development needs that cannot be met at the level of the department.

Administration and record-keeping

The divisional personnel team will be responsible for:

• ensuring that each lead departmental administrator has an appropriate reviewer

• prompting the individual and reviewer to conduct the PDR each year

• retaining a record that the PDR has taken place

• following up any agreed actions beyond the department (e.g. in relation to an administrator’s future career development).

Review of the scheme

The scheme will be kept under review and comments on its operation are welcome.
PERSONAL DEVELOPMENT REVIEW FOR DEPARTMENTAL ADMINISTRATORS: FORM A (FOR COMPLETION BY THE ADMINISTRATOR)

Preparation for PDR meeting

Department:

Date of PDR meeting:

Name of administrator:

Name of reviewer:

This form is intended to help you and your reviewer prepare for the PDR meeting. You are invited to complete it in advance of the meeting and to send the completed version to your reviewer at least five days before the meeting, encouraging him or her to add any additional comments and to return the final version to you in advance of the meeting.

1. How well have you performed against the **core areas** of your job? You may wish to note specific examples (or to highlight any areas where you feel your work has diverged significantly from your job description). What have been your main achievements?
2. How do you feel you have performed against any specific objectives agreed last year? What factors impeded your progress and how could these be addressed in future? You may wish to note specific examples.

3. What specific objectives would you propose for the coming year, taking account of relevant departmental and divisional objectives?

4. What support would you like to achieve those objectives (including training and development)? What development would you like to undertake beyond the current role, including contributing to the broader work of the University?
5. If you wish to discuss this with your reviewer, what broader career aspirations do you have beyond your current department, how might the department support you in those aspirations?

Signed:

Date:
PERSONAL DEVELOPMENT REVIEW FOR DEPARTMENTAL ADMINISTRATORS: FORM B
(FOR COMPLETION BY HEAD OF DEPARTMENT)

Record of PDR meeting

Department:

Date of PDR meeting:

Name of administrator:

Name of reviewer:

1. Core areas of the job

This should be a summary of the main activities since the last review. Use this section to record any actions in relation to the job description or grading of the post.

2. Progress against objectives for the previous year

Record details of any relevant objectives for the previous year and comment on the extent to which these were achieved. Include details of any obstacles to achievement and how these could be overcome, and record any agreed actions.
3. **Agreed objectives for the coming year**

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<th>Target date</th>
<th>How verified?</th>
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4. **Actions identified in relation to training, development and support needs at department, division and university level**
### Administrator's comments

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<th>Signed (administrator):</th>
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<tr>
<td>Signed (reviewer):</td>
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