Skills Guide

The reviewer’s role – step by step

Reviewees expect their reviewer to give time and energy to a PDR. The most frequent complaints from reviewees in the staff experience survey are that reviewers seemed ill prepared, uninterested in the conversation and/or their reviewee, allowed themselves to be interrupted or appeared to be keen to get it over and done with as soon as possible.

Reviewers exert great influence over the PDR experience: they can make or break it for their reviewees. Your role as reviewer can be defined in terms of these responsibilities.

1 Getting organised

- Organise the meeting in good time. Make sure both you and the reviewee have at least two weeks to prepare. You need to give your reviewee enough time to draft the first part of the PDR form (review of achievement and draft objectives) and yourself enough time to read and suggest amendments
- Make sure the reviewee knows the purpose and process of PDR. If this is your or their first meeting, talk these through with the reviewee so that you both know what to expect
- Ensure your reviewee has the appropriate form to complete
- Ask your reviewee to send you the completed first part of the form at least a week before you meet
- Read the document, suggest any amendments and send these back to the reviewee. Make sure you are both agreed on what will be discussed in the meeting, as contained in part one of the form. There should be no surprises

2 Planning what you want to say

- Assess performance and achievement
- Anticipate possible difficulties and think through how you will handle them. If you are anticipating a difficult/sensitive meeting, you may find it helpful to look at the skills guide on preparing for a PDR
- Make a note of any things that need to be agreed by the end of the meeting

3 Making practical arrangements

- Make sure you have a suitable room and that there will be no interruptions
- Make sure you have any relevant information to hand (e.g. training opportunities, any departmental learning and development plans and a copy of any department/faculty plan)

4 Preparing yourself

- Read part one of the form again before you meet
- Try to put aside the challenges of the day and focus on the conversation

5 Holding the meeting

- Facilitate a discussion. The balance of input is ideally about 60/40 in the reviewee’s favour. Some reviewees may be hesitant and may prefer you to lead. It’s best not to assume that this is the case and take up most of the air time

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• Model the behaviours you are looking for: listen, acknowledge other points of view, suggest options and look for constructive solutions

• Keep the conversation constructive and focussed. If you anticipate a challenging discussion, or suspect that you will be giving an unwelcome message, you may find it helpful to read the difficult conversations and giving and receiving feedback skills guides before you start

• Build trust by asking for feedback as well as giving it. You could, for example, ask the reviewee if there are things that they would suggest you stop, start or change in terms of your working relationship

• If you anticipate a difficult conversation about career aspirations or learning and development requests, you may find it helpful to read the career conversations for managers and learning and development conversations skills guides before you start

• Ensure that all objectives agreed are SMART (specific, measurable, agreed, realistic and time bound). You may find to helpful to look at our separate skills guide on agreeing objectives.

• Make notes of the discussion and encourage your reviewee to do the same. This will help you both when you come to agree the meeting outcomes. This may be some days or even weeks later, by which point you will have each forgotten the detail of the discussion

• Remember that the PDR meeting should not be used as the main place to address a performance issue. Performance concerns should be addressed as and when they arise. In PDR you can cover progress made and any work still to be done, but it is not the place to raise an issue of poor performance for the first time or to go over exactly the same ground that has been discussed in a performance meeting. It’s the place to sum up what happened, what was agreed and what else needs to be done, and to identify any further development needed. If you need advice on this, talk to your local HR Officer or your HR Business Partner

• A PDR discussion also shouldn’t be used to discuss re-grading of a post. This should happen in a separate discussion that is just about the prospect of or the case for a regrading. It may become clear in the PDR meeting that the role has changed significantly during the year, or is likely to change significantly. In that case, submitting an application for a post to be re-graded might be an agreed outcome of the discussion. You may wish to schedule a separate, follow-up meeting to discuss this further. (See the University’s advice on re-grading procedures)

• Ask the reviewee to write up the meeting outcomes on part two of the form. Agree when the notes should be returned to you

6 Finishing off

• Chase the meeting outcomes if you need to. Don’t allow this to drift: it is surprisingly easy to discover a year later, when you come to do the next PDR, that you have no written record of the last one

• If you need to, amend the draft outcomes when they arrive and send the final written record to your reviewee for agreement

• If you cannot agree a final written record, talk to your reviewer or to the person designated by your department to help you resolve any differences

• Some departments ask that all PDR outcomes be seen or signed off by your reviewer or the Head of Department. Check your department’s procedure

• Some departments ask that all completed PDR forms be sent to the HR Officer or Department Administrator in order to track completion rates. Check your department’s procedure

• Take agreed PDR outcomes into each subsequent one to one conversation with your reviewee, so that you can amend objectives as changes occur and so that you can discuss the impact of any learning and development agreed

• Think about the themes that have emerged from your PDRs (e.g. workload allocation, communications, resources etc). Some of these may be your responsibility, so what can you do to address them?

Skills guides are available on the Personal development review pages.