

**Performance & Development Review Form (Professional Services Staff – streamlined version )**

**PDR Process and Principles**

**Preparation**

* No paperwork needs to be completed prior to the PDR discussion by either the reviewer (line manager) or reviewee (direct report)
* Unless already received, no new requests for stakeholder feedback are necessary
* In preparation of this discussion, it is important for both the reviewer and reviewee to have considered the reviewee’s overall performance over the last 12 months which includes key achievements and challenges
* Ensure there is sufficient time (usually 1 to 1.5 hour ) for the PDR discussion and all arrangements are agreed in advance

**During the Meeting**

* The reviewer should ask the reviewee to share their own reflections of their overall performance, including key achievements and experiences they found particularly challenging or difficult.
* The reviewer should encourage the reviewee to reflect upon these experiences to consider what they have learnt and how this might be applied to improve performance and job satisfaction.
* The reviewer should offer feedback on what they perceive as key achievements and/or challenges (for note – these should be supported with evidence). The reviewer should also invite the reviewee to offer their reflections on these observations.
* The reviewer may invite feedback from the reviewee for example, what has worked well and / or what can be improved.
* Both parties are expected to consider how well their relationship is working and what can be done to strengthen it.
* The reviewee should be encouraged to discuss their wellbeing. Where appropriate explore further support that can be offered by the University’s Employee Assistance Programme (EAP).
* The reviewer should provide an overview of current business priorities and use this to agree objectives.
* The reviewer should encourage the reviewee to consider their career and professional development aspirations and what can be agreed to support them
* Review of mandatory training and agree a reasonable timescale for completion as required (**section 4**)

**After the Meeting**

* The reviewee should record a summary of the year and the key learning from the discussion (**section 1).**
* The reviewer should record their own observations as well as a summary of the discussion (**section 2).**
* The reviewee should record agreed work objectives **(section 3).** ***It is important to check in with the reviewee on a regular basis to review objectives and ensure they remain relevant and as required, adapted to meet University priorities.***
* The reviewee should record agreed career and professional development objectives **(section 3)**

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| **Name and role of Reviewee:** | **Name and role of Reviewer:** | **Date of review meeting** |
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***Section 1.***

**Reviewee: Reflection on the year (to be formally recorded after the PDR conversation)**

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| **Record reflections on how the year has gone, consider:*** key achievements and successes;
* key challenges and difficulties;
* key learning gained and how to use it;
* your wellbeing and how it can be maintained or improved;
* feedback received from the reviewer and your reflections on it;
* your relationship with the reviewer and how it can be strengthened.
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***Section 2***

**Reviewer (line manager): Reflection on the year (to be recorded after the PDR conversation).**

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| **Record your observations on the reviewee’s year (ensure examples are used to support observations).****Consider:*** key achievements and successes;
* key challenges and difficulties;
* what you have appreciated about their work and approach;
* how you feel they can improve.

**Reflect on learning from the PDR conversation.** **Consider:*** what emerged as key learning for you and the reviewee;
* what they are most proud of;
* how they would like to improve;
* how their wellbeing can be better supported;
* how your relationship can be strengthened;
* what feedback you received and what are your reflections.
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***Section 3***

**Objective Setting**

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|  | *Use this space to agree future objectives with your line manager. These objectives should be reviewed regularly over the forthcoming months. They may need to be adapted to meet changing business priorities*  |
| **Objective** |  | **How does this support your College/directorate/team objectives?** | **Expected outcome/impact** | **Timescale** | **Outcome achieved (met/not met/ongoing[[1]](#footnote-1))** |
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| ***Please use this space to note any amendments to objectives during the course of the year***  |
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| **Career, Professional & Development Aspirations** | *Use this space to identify any areas of strength and development and agree objectives to support this (in the context of budgetary availability and authorisation considerations). In your current role consider which of the capabilities within the* [*Professional Services Capability Framework*](https://blogs.shu.ac.uk/shupdreviewtoolkit/professional-services-capabilities-framework/?doing_wp_cron=1551881000.9331901073455810546875) *will help you be most effective and which will support any future career aspirations. These will be shared with the faculty/directorate leadership team members where appropriate to enable a training and development plan to be developed. Further guidance is available for* [*reviewees*](https://blogs.shu.ac.uk/shupdreviewtoolkit/files/2019/02/Guidance-for-Individuals-on-the-Capability-Framework.pdf) *and* [*reviewers*](https://blogs.shu.ac.uk/shupdreviewtoolkit/files/2019/02/Guidance-for-Managers-on-the-Capability-Framework.pdf)*.* |
| **Resources/support needed including outcome to be achieved** | **Development activity required** (*e.g. join a professional network, lead a cross-functional project, attend training)* | **Resources/support needed**  | **Measure of success** *(e.g. a professional network is creating opportunities, or new skills are being applied)* | **Timescale** |
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***Section 4***

**Completion of required university training/and specialist subject/professional requirements to maintain good standing. Visit the** [**Mandatory Training Page**](https://sheffieldhallam.sharepoint.com/sites/4103/SitePages/Mandatory-Training.aspx) **for more information.**

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| **Description** *- Please note the dates of mandatory training or any role specific training below. All the following mandatory training should be completed every 2 years:* * *DSE, Fire Awareness & Prevent (accessed through* [*BeOnline*](https://shu.awaken-be.com/)*)*
* *Unconscious Bias & Equality Essentials (accessed* [*here*](https://portal.shu.ac.uk/departments/HRD/equality/Pages/Staff%20Training-.aspx)*)*
* *Recruitment & Selection - Chairs of Panels (accessed* [*here*](https://my.corehr.com/pls/coreportal_shup/cp_por_public_main_page.display_login_page)*)*
 | **StatusCompleted Yes/No** | **Date Completed**  | **Review Date**  |
| DSE Workstation Training & Self-Assessment  |  |  |  |
| Fire Awareness  |  |  |  |
| Security on Campus |  |  |  |
| Prevent Duty |  |  |  |
| Cyber Aware |  |  |  |
| Unconscious Bias 1 (all staff)  |  |  |  |
| Unconscious Bias 2 (specific to those in a management role or have responsibility for recruitment) |  |  |  |
| Equality Essentials  |  |  |  |
| Recruitment & Selection - Chairs of Panels  |  |  |  |
| GDPR |  |  |  |
| Introduction to Data Protection |  |  |  |
| Fraud and Bribery Awareness |  |  |  |
| Digital Accessibility |  |  |  |

1. *If it is an 'ongoing' objective and the timescales expand outside the review year please ensure you provide an overview of progress made within this review year.* [↑](#footnote-ref-1)