

Human Resources

PDR Job Chat   
**A Guide for Managers**

Your Job Chat coordinator will send you details of staff in your area that require a PDR Job Chat. They will let you know what documentation you need to complete for our records.

**Main Principles** (read PDR Job Chat Scheme Guide for more detail)

* Complete reviewer training before you carry out a review
* Be prepared: have the reviewee’s job description, last year’s Job Chat form, any Learning and Development forms
* Make it a positive conversation and use coaching questions where possible
* Outline confidentiality; who will see the form
* Agree SMARTER actions together
* Agree what gets recorded on the form
* Follow up after 2-3 months

Below are some notes and possible prompt questions to help you feel confident in carrying out a review.

## **Form 1** Summary of the discussion

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| Section 1 Personal details | |
| **1.1 Name** | **1.2 Job title** |
| **1.3 Date of chat** Click to enter a date. | **1.4 Grade** |
| **1.5 Frequency** | **1.6 Reviewer** |

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| Section 2 My contribution over the past 12 months |
| **2.1** **How has the last year at work been for you?**  Make the atmosphere relaxed and comfortable. You may like to get out of the office environment. This is your chance to show personal interest in the reviewee to set the Job Chat off on a positive note and to promote a free flowing discussion. |
| **2.2 What have you done at work over the last year that you are most proud of? Look at any Learning and Development forms you have completed over the year to help you.**  When you plan the date for the Job Chat, discuss with the reviewee the preparation that is required: you may encourage them to talk to you, the team or their family about the questions and make some notes they can bring with them. It is important your reviewee is engaged with the process and contributes to the process rather than having a Job Chat ‘done’ to them.  Before you start the review, make sure you have prepared well and have a copy of the job description, last year’s Job Chat, and the Learning and Development forms (E&F). Positive progress should be praised along with how any learning and development has helped the reviewee change how they do things. You may discuss any changes in their job description and rework it accordingly. If there are major changes in the job description, talk to your HR partner or advisor. Make reference to any rewards/awards the person has received in the past year.  Make reference to the Professional Behaviours and be positive where specific behaviours have helped the person at work. |
| **2.3 What progress have you made on goals you agreed with your manager? Look at your Form 2 from last year.**  Review progress towards goals that were set in the last Job Chat. Were they achieved? If not, why not? Do you need to re-set any goals? Are there aspects of the reviewee’s performance that need discussing? A Job Chat should never be the first time performance issues are raised, but prevailing issues can be referred to in order to help the person develop and overcome performance issues.  You will be setting new SMARTER goals with your reviewee. Refer to your notes from the’ Job Chat for Managers’ training for more details on this. Make sure they are stretching for the person but not unachievable. Commit to support them with their goals; this will mean meeting again in a couple of months’ time to check progress. If there are performance issues, talk to your HR partner or advisor if you need to. Don’t be tempted to sweep it under the carpet; that won’t help them or you.  Note any actions you both agree. |
| **2.4 What aspects of your job have you found most challenging? What have you done about that?**  You want the reviewee to take personal responsibility for dealing with challenges. You also want them to promote their problem solving skills.  How has the reviewee dealt with any challenges at work? Have they been positive in helping themselves through challenges? Use coaching questions where possible to draw out details; What did you do about that?  What went well? What else did you consider?  Were there any consequences of your chosen course of action?  Would you do anything differently next time?  Is there anything to learn from this? (possible improvements).  Note any actions you both agree. |
| **2.5 What would help your team to work better together**?  This is a chance for the person to give their views on improvements to team work. Keep it positive and focussed. Note any actions you both agree. |
| **2.6 What could your team do to improve how it works and interacts with other teams?**  Use this to identify trends and plan for improvements.  Good questions may be:  How can we make it easier for other departments to work with us?  What would they say about working with us?  Note any actions you both agree. |

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| Section 3 My job |
| **3.1** **Do you have everything you need to do your job well?**  Ask the reviewee if they have enough resources, equipment, training or support to help them in their job. Do you give sufficient information? For example changes in university systems, planning ahead for changes, changes in legislation.  Note any actions you both agree. |
| **3.2 How do you find out if you are doing your job well?**  Individuals need different types and amounts of feedback, but we all need to know if we are doing a good job. Be prepared to adapt how much feedback you give to suit the person.  Make sure you share any feedback from others with the reviewee, such as customer feedback. Only do this with positive feedback. If feedback is negative, it would be best dealt with outside of the Job Chat process and should not include hearsay – only what you have seen or heard.  Note any actions you both agree. |
| **3.3 What do you think would improve the service we give to our customers?**  Your teams will understand the experience the customer has when they access your service. Get their ideas on improvements. Use coaching questions. If you implement their ideas, make sure you tell them.  Note any actions you both agree. |

| Section 4 Planning for the year ahead |
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| **4.1** **Are you clear about what you and your team need to focus on over the coming year? Is there any training or learning that would help you meet your goals?**  You may be able to link personal goals to team goals or wider university strategies. It is your role to link these to wider goals for the person so they see the value of their contribution.  Note any actions you both agree. |
| **4.2** **Do you have any plans or work ambitions for the coming year?**  Have a realistic discussion around this and where appropriate, help the reviewee plan the steps they need to take to start working towards that plan.  Prompt: the person may not want to progress in their role but they can develop by, for example, becoming a work place buddy, taking on a project or taking specific responsibilities at work. This should be encouraged. |

| Section 5 Comments |
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| **5.1** **Is there anything else you would like to raise?**  Give the reviewee the opportunity for them to raise any other issues. You both need to agree what gets recorded on the Job Chat form. |
| **5.2** **Manager/reviewer: Is there anything you wish to raise or comment on?**  Do you need to raise anything else? Remember, performance issues should have been addressed outside of the Job Chat. |

## **Form 2** What we are agreeing to do

You may be agreeing goals with your manager for the coming year. You may also identify any learning you need to help you meet them.

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| Section 6 What we are agreeing you will do |
| [Subject] agrees to do the following (be specific e.g. a training course, carry out a new procedure etc.):  Click here to enter text. |
| When we will review progress by:  Click here to enter text. |

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| --- | --- |
| Signature | Date Click here to enter a date. |

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| Section 7 Your manager’s agreements |
| [Manager] (Manager) agrees to do the following:  Click here to enter text. |

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| Signature | Date Click here to enter a date. |

**A copy of this document is to be kept in a secure place by the senior manager of the department**

Estates and Facilities’ managers and supervisors: as you undertake the year’s Job Chats, please complete the spread sheet ‘Job Chat Training Needs’ which your Job Chat co-ordinator will send you.

Return the completed form to your PDR Job Chat co-ordinator who will summarise the training needs for the whole department. Contact Anne Gallagher for further guidance ext. 5294.