

Performance and Development Review

The role of a Reviewer

Selecting and training reviewers

Reviewers will be identified in each area based on either their management responsibility, people related functions or their natural inclination to support colleagues to achieve their full potential.

Once reviewers have been identified they will be required to undertake a specialised training programme to learn and develop the necessary skills and knowledge to be an effective reviewer.

The purpose of a review discussion

The purpose of a review discussion can be captured in the following way:

- Review and evaluate an individual's contribution to the University.
- Provide an opportunity for reflection.
- Plan for the future in terms of work priorities and development opportunities.

It is the reviewers' responsibility to ensure that the PDR takes place with a reasonable period for preparation and reflection.

Preparation

Ahead of any review conversation, the reviewer should undertake the following preparation.

- Completed the required training with HR.
- Understand the priorities for your work area and your remit for this activity.
- Understand what the expectations are of the individual you are reviewing, looking back at objectives from last year.
- Consider the important areas of discussion for this individual (see link to possible topics for discussion).

- Gather information about the individual's contribution through conversations with key colleagues, feedback, results etc. where appropriate.
- Prepare some thoughts about the individual's key achievements and challenges across the year.
- Review training and development activities undertaken.
- Consider how the individual has demonstrated the University Values and Behaviours or where this may require further development.
- Think about the potential career / development questions that may come up and be prepared to sign post next steps.
- Have some ideas and suggestions for future objectives relating to their role and development (ensure these are SMARTER wherever possible).

Please note that this is not an exhaustive list of preparation required. Similarly, if you have to explore difficult issues with a reviewee, the review conversation should not be the first time it has been discussed.

Where you do have challenging elements of a review conversation to prepare for, please consult your HR Partner / Adviser for guidance.

Practicalities

There are some logistical arrangements that you will need to make ahead of a review discussion.

- Book a meeting at a mutually agreeable time in an appropriate room (with about 2 weeks' notice).
- Share items for discussion with the individual up to two weeks prior to the discussion to allow time for preparation.
- Be clear with the individual regarding the level of preparation expected.
- Allow sufficient time without interruptions.

Reviewing and evaluating contribution

This section of the review requires you to facilitate a discussion regarding the individuals' contribution and performance.

This should link to reviewing objectives, learning activities, achievements, challenges, feedback, and workloads. The preparation you have already done for this will support the dialogue.

The content of this discussion should be summarised on the PDR form.

Contribution for the future

An important part of the review discussion is to determine the priorities for the next 12 months. Objectives need to be set that fit well with the role and the development needs of the individual and where possible should be SMARTER.

These should be made in line with the broader priorities of the work area and personal development needs.

Career discussions

The purpose of this section of the review is for colleagues to have the opportunity to step back and think about their career and future.

This element of the discussion should focus on where people really want to be and to explore logical steps to get there.

Colleagues should not feel limited to the opportunities available at Reading. Be creative and thoughtful about where the next steps may be.

Completing the paperwork

The expectation is that the reviewer will complete the majority of the PDR form.

A number of reviewers have recommended the practice of agreeing and completing the paperwork as a part of the discussion meeting. Reviewers are encouraged to try this approach as a way of saving time and streamlining the process.

The completed PDR form should be held centrally by your School Administrator / PA, but a copy also retained by the individual and the reviewer to allow it to be a living document that can be reviewed and referred to on a regular basis. The form can be completed electronically, it does not require a hard copy signature.

Confidentiality

An individual review should be conducted in line with the following confidentiality principles. The review discussion itself is a confidential discussion. The review form captures the key elements of that conversation. The reviewee and reviewer together agree upon what is to be recorded on the form. The completed form can be seen and used by those with management responsibilities for that individual (including the reviewer, Head of Department/School, Dean, Heads of Group/Support Service equivalent). The involvement of parties beyond this group should be with the agreement of the individual.