MANAGER GUIDE TO PERFORMANCE DEVELOPMENT REVIEWS (PDR)

The Performance Review Cycle

Performance Review Cycle

**Performance Development Review**

- Review past performance

- Development opportunities

- Career aspirations

**Ongoing Discussion**

- Two way feedback

- Discuss Progress

- Update

**Performance Development Planning**

Objectives / foci, expectations, development needs

The Performance Review Cycle should be an ongoing process of developmental performance discussions and feedback which connect BrisDocs culture and goals to individual contributions and performance. The Performance Development Review (PDR) meeting is an annual event but should be considered part of the much broader cycle.

What is a PDR?

A PDR is a meeting designed to give staff an opportunity to take time out to talk about work in a planned manner.  **They are in addition to and not a replacement for day-to-day communications and one-to-one meetings with line managers**.

PDR’s provide a written record of an individual's performance and an action plan for future development.  They help job holders and line managers agree on expectations and objectives / business foci. PDR’s also identify opportunities for professional development and help to establish the organisations support and training needs.  The PDR process is also key for providing the link between an individual’s action points and the organisation / teams action plan/objectives.

Why do we have PDR’s

The delivery of high-quality patient care within BrisDoc depends on every member of staff:

* having a clear understanding of their role and the part they play in their team and the organisation as a whole
* having an agreed focus for their work, this may be set as objectives or a set of priorities
* possessing and applying the knowledge and skills they need to perform that role effectively and to achieve their objectives.
* being engaged and motivated to work to the best of their ability

PDR’s are an important part of maintaining open dialogue between employees and their managers. This two way commitment and communication can help build employee engagement, based on trust and integrity, which in turn contributes to organisational and individual performance, productivity and well-being. In addition research within medical settings has shown that effective PDR’s contribute directly to improved patient outcome[[1]](#footnote-1).

A PDR can help identify and agree ways to improve performance. It formally documents achievements and enables staff to influence their future development.  It is a chance for an individual to look both back at what has been achieved and forward towards future work requirements and the individual’s goals and ambitions.

All staff, at least once a year, should meet with their manager to have a performance and development review (PDR) and this should form part of an ongoing relationship between the member of staff and their manager.

The principles of PDR

The PDR process has three core elements:

* The time and space for an open and honest discussion between staff member and line manager
* Performance review is the process of agreeing the foci for future work, this may be in the form of objectives. The next stage is then assessing how staff perform against these, in the context of the organisation’s goals and values.
* Personal development planning and review is the process of defining the types and levels of skills, knowledge and behaviour that staff require in carrying out their work, assessing their current skill levels against these requirements, and then putting development plans in place to close any gaps or shortfalls.

Who is involved with PDR’s?

Each member of staff should undertake the performance review with their line manager.  PDR’s are confidential and no information will be shared outside of the meeting without the individual’s consent however it should be noted that a copy of all PDR’s will be sent to the HR department for logging and storage in personnel files.

When will the PDR happen?

A staff member will have their first PDR following successful completion of their probation. From this point forward a PDR meeting should take place on an annual basis, at the end of the review a date should be set for an interim review to check on progress about six months later and the next annual review scheduled.

**Preparation**

The performance review meeting should be arranged for a date and time that is mutually convenient.  The performance review date should be agreed a minimum of a week in advance to allow preparation time for both the manager and the individual.  Staff should be allocated a minimum of 1 hour in which they can prepare for their review during work time and line managers should be aware that some individuals might need additional support in doing this.

Managers should ensure that staff have copies of:

* Their job description
* Their last review
* Employee Guidance to PDR

As part of the preparation staff and managers may also choose to compile any supporting information relating to the completion of past action points or proposed future activities e.g. reports, certificates, emails or training course details.

**The PDR meeting**

The meeting should take place in a private area free from interruption and distraction.  An hour should be set aside for the meeting.

Performance review ­­­meetings should not contain any surprises and should represent a summary of the discussions held and actions untaken over the whole review period.

**Completing the Form**

The PDR form is compiled of 3 main sections:

* Analysis Grid for completion of strengths, weaknesses, foci and development needs – to be completed at annual PDR meeting
* Interim review notes – to be completed at 6 monthly interim review (if applicable
* Annual review notes – to be completed at annual PDR meeting, reviewing the initial foci and development needs. Following completion a new form is started for the forthcoming year.

**Analysis Grid**

Strengths

Ask if the job holder understands the requirements of the role. Consider how they have performed the regular activities and key tasks that define it. Have the responsibilities been met?

Discuss aspects of the job which have gone well. Note job holder’s self-assessment of performance. Discussing the job holder’s other achievements is an opportunity to acknowledge and record any significant achievements, additional responsibilities or project work they have done.  These could be either within the normal scope of their role or in addition to it.

Weaknesses

Discuss aspects of the job which have gone less well or proved challenging. What challenges has the job holder faced? This could include, for example, changes to their role or the team, changes in workload, responsibilities or resources, working relationships, additional pressures or work life balance. What has been done to overcome these difficulties?   If there are obstacles that still remain, what action can be taken by the job holder to improve the situation?  What support is required from their line manager or the organisation?

Foci / Objectives

The key areas of focus for the next 12 months need to be recorded here. These can be broken down into short, medium and longer term areas.

For relatively straightforward tasks, set objectives that are clear and specific, and challenging yet achievable. Use the following **SMART** points to help plan the objectives:

* **Specific:** Clear and easy to understand, defines what needs to be achieved.
* **Measurable:** It will be easier to measure some actions / objectives than others.  Where possible think in terms of quality, quantity, turnaround times and deadlines.  Where measuring is more difficult, it may be useful to consider the following:
1. How do we know we need to improve in this area?
2. How will we know that we have done so?
3. What will be the outcome?
* **Achievable:** Challenging but also attainable with the resources and time available.
* **Relevant:** To the role of the job holder and the business area. It should reflect individual needs and priorities of the organisation.
* **Time limited:** When do you want the action point to have been completed?

When faced with complex tasks it is advised to set ‘do-your-best’ expectations or goals focused on learning and behaviour[[2]](#footnote-2). The reason for this is that, for complex tasks, there is a high level of focus needed to navigate these and act in an appropriate manner. In this situation specific and challenging goals can detract from the immediate things we need to focus on to perform.

Whether SMART objectives, goals or foci, a maximum of six are recommended.

Developmental Needs

Can the employee foresee any specific challenges in fulfilling the objectives / foci?  What assistance do they need to avoid or overcome these?  There may be forces beyond their control that others are able to influence. For example, the allocation of additional resources, a diversion of workload, communication briefings, additional management support, etc.

Refer to each of the agreed objectives / foci and consider the learning and development needs associated with it.  Would development of the job holder’s knowledge, skills or experience assist them, and if so how this might best be achieved?  Some examples of on and off the job opportunities are listed below.

|  |  |
| --- | --- |
| **On the job** | **Off the Job** |
| Shadowing   | Networking groups |
| Training from a colleague   | Training courses |
| Increased responsibility   | Qualifications |
| Feedback & guidance   | Professional journals publications |
| Coaching   | E-Learning & web forums |
| Mentoring |    |

You may or may not be able to complete how the development needs will be met during the performance review itself, further research may be needed.

In addition to specific learning needs it is also useful to discuss the employee’s hopes, priorities and aspirations for next year. Are there any areas in which the employee feels they are not reaching their full potential?  An open discussion around what the employee is looking for in terms of achievements and job satisfaction over the next year will help the managers to understand what motivates them and assist in identifying opportunities for them.

My Manager

As part of this section the ‘My manager supports me by…’ and ‘My manager could help me by’ area allows for managers and job holders to discuss areas where line managers actions could be improved to enhance engagement, job enjoyment and overall performance and how the line manager can support them better. This may be around management style, opportunities for 1 to 1 meetings etc. If employees do not wish to have this conversation during the PDR meeting it may be used to ‘open the door’ to such discussions at a later date as appropriate.

**Interim Review**

An interim review may be held 6 months after the annual review. This is particularly useful where line managers do not have regular 1 to 1 contact with staff due to geographical distance or shift patterns that do not coincide. A shorter meeting than the annual PDR, this is an opportunity to discuss what progress has been made to achieve the objectives / foci detailed during the annual PDR and any additional support or learning needs that have arisen.

**Annual Review**

At the next 12 month annual PDR, before moving onto a new PDR form it is important to refer to any objectives / foci set at the last review. Have these objectives been met? Did the business foci remain the same?, If not, what were the reasons for this?  Put any comments into the form prior to sign off. This discussion may well also form part of the next PDR in terms of Strengths, Weaknesses etc.

Safeguarding – please ensure that you take this opportunity to discuss the safeguarding development (both adults and children) that the staff member has undertaken across the previous 12 month. This allows us to ensure we keep accurate records that our staff are up to date with the safeguarding requirements. This information can include formal training, team discussions, case reviews, personal reflection etc. Please ensure details, including dates are noted on the PDR form.

**After the PDR and/or interim review**

**Following the meeting, the notes from the meeting should be written or typed up and agreed by both the employee and line manager. They should each sign the form and a copy made for both parties.**  The line manager should then file their copy together with any accompanying paperwork and also send an electronic copy to the HR department for recording on Rotamaster.

1. See ‘*Reducing patient mortality in hospitals: the role of human resource management* ‘, Carol Borrill and Michael West, Aston Business School, 2003 and ‘*Silence Kills: the Seven Crucial Conversations for Healthcare ’,*David Maxfield, Joseph Grenny, Ron McMillan, Kerry Patterson, Al Switzler, 2005. [↑](#footnote-ref-1)
2. See “*Could do better? Assessing what works in performance management*”, CIPD, December 2016 [↑](#footnote-ref-2)