

# Performance & Development Review Policy

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# Performance & Development Review Policy

## 1. Introduction

BrisDoc is committed to the development of its staff. This policy applies to all members of staff at BrisDoc i.e. employees and casual workers (although the process is slightly different for casual workers – see section 6). In order to ensure that BrisDoc meets this commitment BrisDoc requires all staff to undertake at least one annual Performance & Development Review (PDR) meeting with their line manager and to have agreed objectives / foci for their role. All employees (excluding casual workers/bank staff) should also have an agreed training and development plan. For all salaried GPs and nurses, the PDR process will be complementary to the NHS appraisal process so some future objectives may be set the same for both processes. However, the BrisDoc PDR process will primarily focus on the individual's role in the context of BrisDoc, i.e. how they perform against the objectives of the specific service in which they are employed. PDR is a positive process designed to assist staff in their jobs and in their personal development and it is also a critical element within BrisDoc's clinical governance process. PDR will therefore be a requirement for all BrisDoc staff.

## 2. Purpose

**In line with BrisDoc's business focus areas, we are committed to:**

### **Patient Care**

- Ensuring all our patients are treated by high performing staff.
- Ensuring BrisDoc maintains a safe service to our patients.
- Each member of staff knows what is expected of them in order to best help the patient.

### **Workforce Care**

- Ensuring that all staff are helped and encouraged to reach the standards of performance that the organisation requires.
- Ensuring that all staff know how important their role is and the positive contribution they bring in the wider context of the company.
- Ensuring that every member of staff is given uninterrupted time with their line manager at least once a year to discuss their performance and job role.
- Opportunity to discuss further training and development.
- Ensuring all managers are committed to the system and aware of the acceptable standards each staff member will be expected to achieve.

### **Quality Care**

- Ensuring BrisDoc provides high quality care through the effective management and development of all employees.
- Increasing the performance of staff and thereby reducing the risk of underperformance.

### **Resource Care**

- Ensuring that underperformance is effectively managed in a way that is cost-effective for the company.

The PDR is an opportunity to take an overall view of work content, loads and volumes, to look back on what has been achieved during the reporting period and agree foci /objectives and training and development for the next. The main purposes of a PDR system are usually to review performance, potential and identify training and development needs. However, it can

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help to recognise, at an early stage, the beginnings of a problem, and identify improvement action to achieve a positive outcome.

The PDR is also an opportunity for the member of staff to discuss and understand the key business objectives and their contribution to those objectives.

The main aims of BrisDoc's PDR scheme are:

- To have a 2-way discussion about the staff member's performance and work.
- To recognise the staff member's contribution to patient services and to the achievement of BrisDoc's overall objectives.
- To review methods of working, the working environment, workload, opportunities for flexible working and the availability of resources.
- To optimise the use of the individual's skills and ability in achieving BrisDoc's service priorities.
- To set out and agree a personal development plan for employees, designed to improve performance, meet organisational objectives and, where appropriate, to meet CPD requirements and/or equip the individual for further career advancement within the principles and framework of lifelong learning.
- To support learning and development.

To provide a regular opportunity for individuals to raise any other concerns and to make suggestions for improvements

## 3. Responsibility

### 3.1

It is the responsibility of both the line manager and the employee/worker to schedule a regular PDR (at least once per year). It is the line manager's responsibility to complete the paperwork and provide copies for the individual and the Workforce Support Department.

### 3.2

It is the responsibility of every member of staff to participate fully in the PDR process.

### 3.3

It is essential that PDRs are carried out in a fair and objective manner and not be discriminatory in any way.

## 4. Frequency

The frequency will depend on which PDR process the employee works within, i.e.

- 4.1** Full Process - for all employees who work 10 hours or more per week, (or for staff who opt into the full process). Formal PDR meetings must be carried out at least annually, ideally with one interim review after 6 months.
- 4.2** Streamlined process - for employees who work less than 10 hours per week, one formal PDR meeting annually.

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- 4.3** Bank / Casual workers – please refer to section 6.
- 4.4** In some circumstances, e.g. during periods of rapid organisational change and/or to assist more rapid development, it may be necessary to hold a PDR more frequently. PDRs should be a continuous process and therefore discussions between manager and staff member should take place regularly.
- 4.5** Employment at BrisDoc is subject to a probationary period of six months, during which time staff will be required to demonstrate their suitability for the position in which they are employed. The employees first PDR should take place at the time of probationary sign off. If there are any concerns related to the employee passing their probation, these should be communicated as early as possible, ideally using the optional month 1 and/or month 3 checklists. *(Please refer to BrisDoc's Induction Policy and Procedure for more details)*
- 4.6.** Expected timeframes for PDRs:
- Main Annual PDR: After successful probationary period and before 31<sup>st</sup> October each year.  
Optional Interim PDR: 6 months after annual PDR

## 5. Procedure for Employees

The following sections apply to all employees including those employed on a fixed term contract. *(Please refer to section 6 for the procedure for bank staff / casual workers)*

### 5.1 Preparation and Planning

- Both the manager and the employee should prepare for the meeting. Proper preparation is probably the most significant indicator of successful meetings.
- It is important to gather examples of work undertaken throughout the year to ensure the PDR is not just based on recent events.
- Before the PDR, the employee's line manager will at times audit a sample of calls/ triages/ diagnoses / any other relevant work performed by the employee if this is applicable to their job and will discuss the findings at the PDR meeting. This is for the purpose of clinical audit and governance, as well as for training development.
- Before the PDR the employee will read Appendix A – Employee Guide to Support Process for PDR.
- Before the PDR the line manager will read Appendix B – Managers Guide to Performance Development Reviews.
- The line manager should be aware of what the Business Focus is for the upcoming year for their service (i.e. Service Focus) to ensure the objectives set with the employee fit the areas of focus.

### 5.2. PDR Meeting

- The quality of the PDR meeting is of paramount importance. The following 'ground rules' should be observed:
  - Adequate notice of the meeting date should be given.

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- Meetings should be face to face and not over the telephone.
- Staff should be given access to the relevant paperwork, including their job description, and information about the Business Focus (and Service Focus if applicable) and time to prepare.
- Meetings should not be cancelled and if in extreme circumstances they are cancelled, an alternative date should be arranged immediately.
- Meetings should take place in private and comfortable surroundings.
- There should be no interruptions.
- Adequate time should be set aside (1 hour as a guideline).
- The emphasis of the meeting should be on positive dialogue and on honest and open feedback. This meeting is an important opportunity to recognise the unique contribution of individual staff to the service. The meeting should however focus mainly upon the future and on the support and development available to enhance future performance and job satisfaction and morale. Problems should be dealt with constructively and a way forward agreed.
- The meeting is also opportunity to discuss and plan for career advancement for those who seek it.
- The meeting should feel like an experience that is 'owned' by the employee. The employee should always be encouraged to take a lead in the discussions, following the ideal scenario - that 80% of the talking is done by the employee.

### 5.3. Performance Management

When at the meeting, the following should be adhered to:

- There must be a joint review of the individual's work.
- Performance should be measured against agreed foci / objectives as well as main responsibilities as set out in the employee's job description. The manager should offer examples of what the individual has done well and not so well. There should be no surprises in a PDR meeting, as issues should be raised with the individual as they occur.
- The agreed foci / objectives should encompass the major elements of the job, be limited in number (usually a minimum of four, maximum of eight) and where objectives are set these should be "SMART". See section 5.5.

### 5.4. PDR Outcomes

- There are two key outcomes from the PDR, these are:
  - An agreed record of what has been achieved.
  - A set of agreed Foci / Objectives and a Personal Development Plan, if appropriate, for the next reporting period. (See Appendix B)
- Time should be allowed during the PDR to reflect on and evaluate accomplishment of objectives, and training and development from the previous PDR.

### 5.5. Objectives / Foci

- BrisDoc requires that all staff will work towards clear objectives / foci. This will enable staff to assess their own progress and have insight into their role.

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- Objectives / foci should be linked to the aims of the organisation. It is therefore essential that at the start of the PDR process the employee and line manager understand what these are.
- When faced with complex tasks it is advised to set 'do-your-best' expectations or goals focused on learning and behaviour. 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.
- 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**
- Objectives should be concerned with the specific activities of the employee. They should be challenging and designed to support performance and not simply a list of duties.
- **Measurable**
- Objectives should be clear and easily measured. The line manager and employee should be sure that they can both measure the output and identify if it has been met.
- **Achievable**
- Ensure that objectives set can be achieved. If the employee feels that an objective cannot be achieved, it is likely to discourage the employee.
- **Relevant**
- The objective agreed should be relevant to the objectives of the business.
- **Time Bound**
- The employee's objectives must have agreed timescales.

### 5.6. Personal Development Plan

At the PDR meeting, the line manager and employee should agree a Personal Development Plan.

- The Personal Development Plan (PDP) is a critical element of BrisDoc's PDR scheme and recorded in the 'Developmental Needs' section of the form. It is also a Department of Health requirement that all staff have a PDP.
- The plan should reflect the development needed to enable the member of staff to meet their agreed foci / objectives and improve their ability to meet the requirements of their current role and thereby enhance BrisDoc's ability to meet its objectives.
- Line managers and staff are encouraged to consider the whole range of developmental activities available and are encouraged to be imaginative and innovative in using a wide variety of learning opportunities in order to meet developmental needs.
- Line managers and staff should give consideration to preferred ways of learning and development, availability, funding and how to access it, practical issues such as location, timing and travel and the benefits of gaining formal recognition or accreditation for learning and development. (*Please refer to the Training & Development Policy and Procedure for further information*). Please note that staff employed on a fixed term contract will have the duration of their contract considered before any further development/funding is agreed.
- The PDP should also set out who is responsible for doing what and by when.

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## 5.7. After The PDR

- Although PDRs may only occur once a year, it is important that foci / objectives and PDPs for the individual are regularly reviewed & monitored, and become part of the ongoing supervision process.
- It may be helpful to agree dates for interim reviews so as to monitor objectives in the PDP's throughout the year, ideally every six months.
- Individuals should be encouraged to reflect on their personal development throughout the year when undertaking both planned development & learning activities, as well as unplanned workplace development, e.g. undertaking new areas of work that might increase knowledge or skills.
- Following the PDR, the manager should ensure that the individual is supported and has the opportunity to undertake planned development activity as agreed in their PDP. This may include assisting in securing funding and other resources such as special study time/leave (in line with BrisDoc's Training & Development Policy).
- When an individual has undertaken any developmental activity, it is important that the line manager meets with the member of staff to evaluate the benefits and identify learning that has occurred, as well as exploring how this learning can be transferred and applied in the workplace.

## 6. Bank Staff/ Casual Workers

Bank/Casual Workers Staff will have a PDR at least once a year however, the meeting will simply focus on ensuring the member of staff is aware of what the service objectives are and the objectives for the role that they are undertaking every time they work at BrisDoc. (Please refer to section 5.5). A Personal Development Plan (PDP) will not apply to bank staff and casual workers. These workers will still be required to undertake statutory and mandatory training in order to satisfy both legislation and some essential role requirements.

## 7. Monitoring, Recording and Reporting

The maximum benefit can be obtained from the PDR process when there is openness between the employee and manager. Care must therefore be taken with the storage of written records - which must be held securely, and access and use must comply fully with the requirements of Data Protection legislation. PDRs will be held in private, and copies of any recorded matters must be held by both line manager and employee. A copy will also be held in the employee's personal file within the Workforce Support Department. Following every PDR, the manager will send a copy of the PDR to the Workforce Support Department to record on Rotamaster within the employee staff record. This will enable BrisDoc to monitor the PDR process and ensure that no employees are being disadvantaged through lack of access to development. This record may also be used to inform BrisDoc Management Board of any identified training needs.



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## 8. Confidentiality

In order that everyone has confidence in the PDR process and is able to be honest and open, a high level of confidentiality must be applied to the process.

Particular care must be taken with any written or electronic records. Discussion taking place during the PDR meeting must be treated as confidential.

In very rare cases matters of such seriousness may arise during a review meeting that absolute confidentiality cannot be guaranteed. In these rare cases the member of staff should be informed of any action to be taken or contemplated.

## 9. Training

In order to ensure that PDR meetings are effective and meet the needs of the organisation, the manager and the individual member of staff, it is essential that they be conducted to the highest possible standard.

Where requested the workforce team can arrange PDR training for line managers.

## 10. Related policies

- Managing Performance Policy and Procedure
- Induction Policy and Procedure
- Training & Development Policy

## 11. Change Register

Date	Reviewed and amended by	Revision details	Issue number
30/12/2021	HHW	Updated format to 2018 layout	6
30/12/2021	HHW	Replaced reference to HR department with workforce support department	6
31/12/2021	HHW	Added Personal Development Plan Template to appendix D	6
31/12/2021	HHW	Reworded such that interim PDR's, while encouraged, are optional	6
31/12/2021	HHW	Reworded such that PDP's, while encouraged, are optional	6
31/12/2021	HHW	Reworded such that initial PDR is required after probationary sign off rather than at month 1	6
28/02/2024	JB	Owner and change of job title for M Duncan	6.1

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## Appendix A

### MY PDR – WHAT IT WILL DO FOR ME?

A PDR is about **you** because it gives you the opportunity to spend quality time with your line manager to:

- Say how you are feeling about yourself, your role and BrisDoc
- Talk about your achievements and receive proper recognition and thanks for what you've done
- Have a positive discussion about how you're doing in your job
- Discuss what your aims and aspirations are for the future
- Review the professional and organisational standards you need to achieve to do your job well
- Say what you find satisfying about your job, what you most enjoy and how you can develop your role further
- Identify what needs to be improved and how this will be done
- Agree what support, training or coaching you need to make sure you can do your job well
- Talk about possible or necessary change
- Discuss the things that your manager does well and areas where they could support you better / differently
- Anything else you want to discuss

You're the best person to honestly review how you're doing in your job so please take some time before the PDR meeting to review your job description, think about your successes and challenges over the previous 12 months and your future aspirations and development needs. The forms included within this guidance may help you to focus these thoughts. Please allocate sufficient time to carry out your review by setting aside adequate time from your normal day to day duties to enable you to do so.

#### **Who should have a Review?**

All BrisDoc staff including Bank Staff will have a Review at least annually.

#### **Preparing for your PDR**

Preparation involves both looking back and looking ahead.

Examining the last period of performance and the factors that have affected it.

Suggesting objectives and / or foci for the next 3, 6 and 12 months and the support required to achieve them for the next period.

At each annual review we also ask staff to reflect on any safeguarding related development undertaken, this could include training (both e-learning and face to face as appropriate), team meeting discussions, case reviews etc. Please ensure details, including dates are noted on the PDR form.

Attached is a form entitled 'PDR PREPARATION – EMPLOYEE', please use this to assist you in preparing for your PDR.

Your line manager will inform you of the date for your PDR and will outline how you are to prepare. If, at the end you have any further doubts, then you should go back to your line manager with your questions.

There are four key areas to consider:

#### **The Past**

Obtain a copy of your previous PDR. What were your agreed objectives and / or foci at that interview? Have these been achieved? If so what went well? If not, what hindered you and why? Are there any factors which have made your job harder i.e. resources, support from others,

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changes in procedures, crisis, etc?

Please also take this opportunity to reflect of what safeguarding development you have undertaken

- in the previous 12 months. This might include formal training and development but may also include case reviews, practice reflection, team discussions etc.
  
- **The Present**  
In your job, what are your strengths and development areas, your likes and dislikes? What do you think you are best at and least good at? What do you like and dislike the most? What are the important issues you want to raise at this discussion?
  
- **The future**  
What objectives and / or foci do you want to achieve in the next period? What further training and development might you need to help you achieve your objectives? What support will you need? The support should help you to achieve your objectives and contribute to your overall development.
  
- **Your Personal Aspirations**  
Do you want to discuss your future at this meeting? If so what do you want to say?

## After Your PDR

It is important the outcomes of the meeting are recorded on the PDR documents and that you undertake the agreed actions.

During the course of the period remember to keep examples of any achievements made, positive feedback from patients or colleagues etc. as this will help you to prepare for future meetings. For clinical staff who wish to use the BrisDoc PDR to help support their clinical appraisal process this evidence may be stored with the PDR paperwork.

## Conclusion

In simple terms your PDR is an opportunity for you and your line manager to examine what has happened over the past period and what should happen in the future. To be effective, the PDR must be a two-way process. Remember that you know much more about the practicalities of doing your job than your line manager does, so your input into the discussion is vital.

## PDR PREPARATION – EMPLOYEE

Do you understand the requirements of your job?
Do you have regular opportunities to discuss your work with your line manager?

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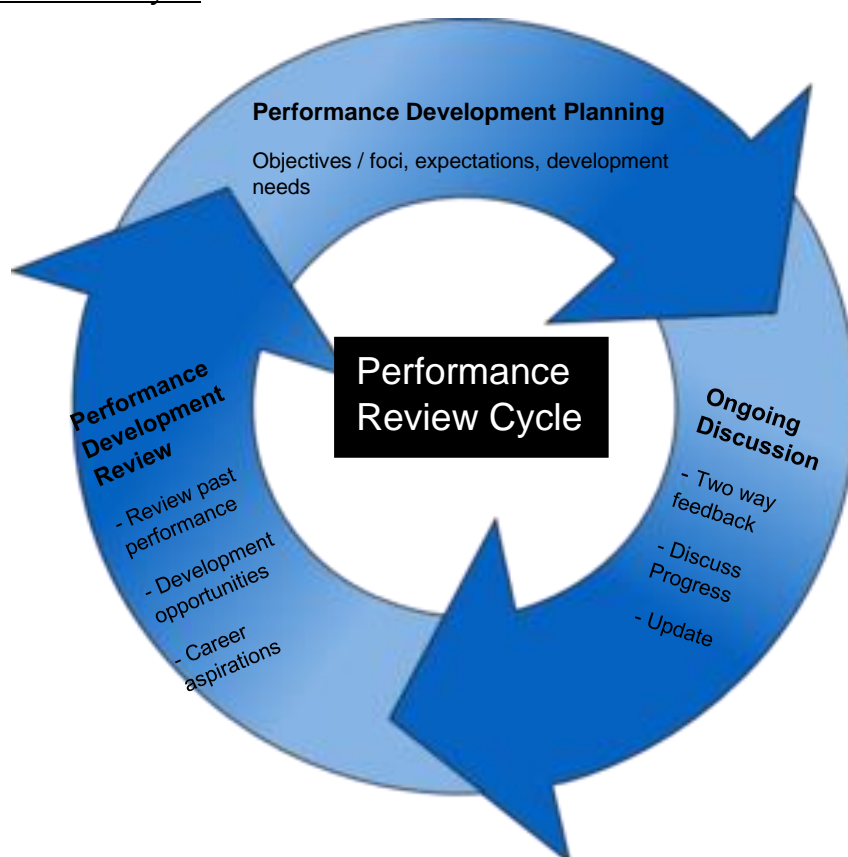
What does your line manager do well and what could they do better in terms of supporting you to achieve?
Review the objectives and / or business foci from your last meeting. Do you feel you have achieved these?
Which aspects of your job do you do well? Please list here any other achievements of which you are particularly proud? If you have collected 'evidence' over the preceding period please bring this to your PDR meeting.
Which aspects of your job do you do less well or find difficult? What particular challenges or frustrations have you faced since your last review?
What are your hopes, priorities and aspirations for your work over the coming year?
What development is needed during the next 12 months?
What safeguarding development have you undertaken in the last 12 months? What evidence have you for this?

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## Appendix B

### The Performance Review Cycle



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.**

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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<sup>1</sup>.

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,

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<sup>1</sup> 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.

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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 undertaken 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

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- 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<sup>2</sup>. The reason for this is that, for complex tasks, there is a high level of

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<sup>2</sup> See "Could do better? Assessing what works in performance management", CIPD, December 2016



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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**

Shadowing

Training from a colleague

Increased responsibility

Feedback & guidance

Coaching

Mentoring

### **Off the Job**

Networking groups

Training courses

Qualifications

Professional journals

E-Learning & web forums

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

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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.

# Performance & Development Review Policy

## Appendix C

Name:				Job Title:			
Date:		Review Period:		Present at Discussion			
<b>Strengths</b> What has gone well? What have been the most important achievements? What has been most enjoyable?				<b>Challenges</b> What hasn't gone so well? What has been most challenging? What have you disliked the most?			
<b>Foci / Objectives</b> What are the key focus areas? Are there specific objectives to be met?				<b>Developmental needs</b> What development is needed to be successful and enjoy the current role? What future aspirations will require development?			
My manager supports me by.....							
My <u>Manager</u> could help me more by...							

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Interim Review Date:		Present at meeting:	
Employee Comments:		Line Manager Comments:	

Annual Review Date:		Present at meeting:	
This free text section allows you to look at the foci / objectives set at the initial meeting and the development needs identified and comment on the outcome of these.			
Employee Comments:		Line Manager Comments:	
<b>Safeguarding:</b> Please discuss what safeguarding development you have undertaken this year inc. any training, case reviews, team meetings etc.			

Employee Signature:	Line Manager Signature:

### Appendix D

Name:			Date:		
Objectives <i>What do I want to be able to do or do better?</i>	Success Criteria <i>How will I recognise success? How will I review and measure my improvement?</i>	Actions <i>What method will I use to achieve my learning objective?</i>	Implementation <i>How will I practice and apply what I learn?</i>		