**Performance Development Review (PDR)**

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| **Personal Details** | | | |
| **Employee Name** |  | **Employee Job Title** |  |
| **Manager Name** |  | **Manager’s Job Title** |  |
| **PDR Date** |  | **Date of previous PDR:** | |
| **Provisional date of next PDR:** |  |

**Introduction**

A Performance Development Review (PDR) is an opportunity for staff to have a meaningful conversation with their line manager about how they feel the past few months have gone, to share what they are most proud of achieving, and to discuss what can be achieved in the year ahead. This includes looking at opportunities for staff development- whether through participation in new projects, shadowing staff or undertaking formal learning and any health and wellbeing matters that may be relevant.

**Instructions**

PDRs should take place every quarter January, April, July and October. With regular ‘one to one’ meetings in between to ensure progress is being made against objectives and to ensure personal development is achieved. Following agreement of objectives, individuals’ performance will be reviewed regularly through 1:1 discussion.

**Employee Preparation Before your PDR:**

1. Agree on a PDR date and time with your line manager, and meeting invite to be sent to manager by yourself for approval.
2. Once approved, self- assessment to be completed ahead of your meeting, this will help trigger the conversations around your PDR. (The meeting should be driven by you and not your line manager, this is your meeting.)
3. Detail what’s working well and what needs working on against your previous targets (this is not relevant for new starters)
4. Think about your objectives for the months ahead, and what development and support you require to achieve them.
5. Forward this PDR document with the required information completed 1 week prior to the date of your PDR.

**What happens in a PDR?**

1. Your PDR meeting should be driven by employee, so it is important that you complete the self-assessment prior to the meeting.
2. Bring this document with you - it will guide the conversation
3. Be ready to discuss your progress and your aspirations for the months ahead and beyond.
4. Be clear about any training that you need to attend / complete and any actions that you want to set yourself.

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| **Self-Assessment (to be completed by the employee) This is your opportunity to demonstrate to your manager what you feel is working well, what needs working on and your career aspirations.** | |
| **What’s Working Well?** | **What Needs Working on?** |
| **Career Aspirations** | |
| **This part of the form needs to be completed and submitted to your manager prior to your PDR meeting to enable you both to be prepared for conversations within your meeting.** | |

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| **Objectives (Actions)**  **An objective is essentially a goal or a measurable step within a designated period. Objectives can be expressed as targets, tasks or projects that are to be completed by a specific date and to specific standards to achieve defined results. All objectives should be SMARTER (Specific, Measurable, Achievable, Realistic (Relevant), Time bound, Evaluated and Reviewed)** | | |
| **Previous Actions:** | | **Status:** |
|  | |  |
| **Forthcoming Actions:** | **By Whom:** | **Target Date:** |
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Please bring this page along with you to your next PDR to measure if objectives have been achieved or if an extension needs to be added.

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| **Personal Development Plan (PDP)**  **The PDP supports the delivery of objectives, career aspirations and values and behaviours. Managers should use this to support the development of the delivery of team objective and quality improvement plans, whilst recognising and support an individual’s career aspirations. This plan should include formal and informal learning opportunities, e.g., shadowing, projects, research, coaching/mentoring, 360 Feedback, leadership or management development programmes, Apprenticeships, formal training etc.** | | | | |
| **What is It I want to develop?**  Today and for the future | **Proposed Solution**  What activities / training will help me to achieve this? | **Actions**  Who needs to do what? | **Measures**  How will you know if you have achieved this | **Timescales** |
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| **Employee Name:** | **Signature:** | **Date:** |
| **Manager Name:** | **Signature:** | **Date:** |

If the Manager has identified Learning and Development actions, The line manager should email a copy of PDP to [learning.development@stbasils.org.uk](mailto:learning.development@stbasils.org.uk) **only.**A copy of the full form should be retained by the employee and saved in the designated PDR folder on the shared drive/HR system.

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| **Final discussion (To be completed by manager in discussion with the employee)**  **This is an opportunity to cover anything else you want to talk about, including your health and wellbeing (including learning difficulties and disabilities LDD) at work and any relevant issues outside of work. Reflect on how the past few months have been, what are you most proud of? If you are new to St Basils, or new in your role this is your opportunity to discuss how you feel things are going so far.** | | | |
| **Employee overall summary & feedback** | | | |
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| **Manager overall summary & feedback** | | | |
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| **Manager to tick once they have completed the following actions:**  Copy of PDP sent to learning and development department (if any PDP has been identified)  Up to date Health Questionnaire & Medical consent form completed and returned to HR (if one has not been completed in the last 12 months). | | | |
| **I confirm that I have read this review and that it is an accurate summary of the review discussion** | | | |
| **Employee’s signature:** |  | **Date:** |  |
| **Manager’s signature:** |  | **Date:** |  |