Annex A - Progress and Development Review Form: Guidelines for Professional and Support Staff

There are separate guidelines for Research staff.

**Section 1 - Preparation**

Preparation should begin three weeks prior to the Progress and Development Review. The reviewer and reviewee should agree an agenda based on the points below and any other points they would like to discuss in the review.

Two key documents to support preparation are: last year’s PDR form and the [Talent Management Framework](#).

There are two options on how preparation should take place:

1. The reviewer and reviewee bring their notes with them to the meeting and be ready to discuss their ideas/views during the review.
2. The reviewer and reviewee agree that the reviewee write notes under each of these key headings below and submit these to the reviewer a week before the review is due to take place.

Either way, the reviewee should come prepared with notes and/or ideas, together with objectives they would like to discuss for the coming year.

Preparation should include the following:

**Objectives met**

- How well were these objectives met – what are the learning points, what could be done differently in the future?
- If objectives were not met, what were the reasons for this and what can be done to ensure that they are met in the following year?

**Areas of achievement outside of objectives**

- What significant tasks have been undertaken that were not agreed as objectives?
- What are these achievements?
- What was learnt from these achievements?
- Can these achievements be built upon and made into future objectives?

**Areas of difficulty**

- What are the areas of difficulty?
- Ideas on how to overcome them. What support may be required?
- If areas of difficulty have been overcome, how did this come about? What are the learning points?
Thoughts on future objectives to be agreed

- This may include projects; research; tasks which will bring about improvement (e.g. process and service);
- A review of the Talent Management Framework and consider activities that will enhance relevant skills, capabilities, competence and confidence levels; for example tasks that will focus on e.g. ‘communicating and listening’ or ‘managing self and others’.

Feedback on any learning and development undertaken

- What worked well, what didn’t work so well and why?
- What are preferred learning styles and approaches?
- Any Study Assistance that has been undertaken?
- What have been the benefits and impact, including reference to the Talent Management Framework, of the learning and study to you and the department.

Thoughts on future learning and development needs

Based on a review of the Talent Management Framework, these may include: coaching; projects; delegated tasks; on-the-job training; mentoring; job shadowing; secondments; attending seminars and conferences; training events; reading. This may include a discussion on the Study Assistance Scheme.

Section 2 - Setting objectives

Objectives should be drawn from four main sources:

1. The individual’s overall performance against the key responsibilities listed in the Job Description;
2. Any specific objectives arising from the School/Department Objectives;
3. Any objectives following a review of the Talent Management Framework. These may link to longer term goals and future aspirations.
4. Areas to focus on resulting from the Progress and Development Review discussion itself; they should be SMART.

A SMART objective is a mutual agreement on a specific outcome that a reviewee is expected to achieve for the coming year.

SMART objectives are:

- Specific- should specify what you need to achieve.
- Measurable- should be able to measure whether you are meeting the objectives or not.
- Achievable- are the objectives you set, achievable and attainable?
- Realistic- can you realistically achieve the objectives with the resources you have?
- Time- when do you want to achieve the set objectives?
Examples of objectives

Example 1

- **Objective and completion date:** To organise and provide administrative support to A, B and C committee meetings by 4 December 20xx. To include the writing and distribution of good quality agendas and minutes at least 2 weeks before and after the meeting
- **Measures of success:** Increased effectiveness of committee meetings. Minutes and agendas are clear, accurate and concise.
- **Any comments:** Review progress at a monthly one-to-one meeting by 15 November.

Example 2

- **Objective and completion date:** To manage the team’s implementation of the change plan from T project between 1 August to 15 November 20xx.
- **Measures of success:** The change plan is implemented by 15 November and to budget. To use the behaviours in the Talent Management Framework ‘Innovation and Change’ to support delivery. Staff are effectively using the new processes and are sharing learning.
- **Any comments:** Review notes from the Change Management briefing attended in 20xx by 1 July. Discuss progress at monthly one-to-ones.

Example 3

- **Objective and completion date:** To produce clear, accurate and effective written communication as referenced in the Talent Management Framework ‘Communicating and listening’. This includes the all-staff guidance notes for Z project by 30 January 20xx.
- **Measures of success:** Guidance notes are clear, accurate, free from jargon with links to further information. Guidance notes for Z project are checked and available to the leadership team by 20 December 20xx.
- **Any comments:** To review the Linked-In Learning on-line Module ‘Business Writing Principles’ detailed in the development plan. To check drafts and self review for clarity and accuracy.

Example 4

- **Objective and completion date:** To carry out the team’s PDRs in accordance with the scheme by 15 October 20xx.
- **Measures of success:** All PDRs meetings would have taken place and PDR forms completed and forwarded to the Director of Operations for review by 30 October 20xx. All staff will have development plans within their PDR, as referenced in the Talent Management Framework “Managing self and others”.
- **Any comments:** To attend a PDR course for reviewers in the development plan.

Section 3 - Development Plan

The development plan should be based on an assessment of the skills, knowledge and experience required to achieve the objectives agreed for the year and to progress the job to a fully competent standard. To support this please use the Talent Management Framework.
Responsibility for progressing and researching training and development opportunities is shared by the job holder and their manager. The onus is on the job holder, or the manager/reviewer, to contact Organisational Development for advice, or to book places on a workshop.

Actions could include coaching; mentoring; projects; delegated tasks; on-the-job training; job shadowing; secondments; attending seminars and conferences; networking; training courses; reading etc.

You may also want to think about any development needs which link to your longer term goals and aspirations.

This is the opportunity to discuss and record Study Assistance plans.