Purpose of the booklet

This booklet is designed to act as a reference guide for all support staff (whether as a reviewer or a reviewee) to enable them to participate in the Performance and Development Reviews (PDR) Scheme confidently and effectively.

Since all staff will receive a review, the booklet is written from the perspective of a reviewee. Further guidance notes on how to approach the PDR as a manager are given at the end of the booklet.

If you have any queries about this guidance, or other support available for this scheme, please contact HR Professional Services on 020 7955 6659.
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Aims of the Performance Development Review scheme

The PDR scheme is designed to be an open, constructive and positive experience for all support staff. It provides an opportunity for staff to be clear about their role, their contribution to the School and how effectively they are performing, as well as an opportunity to highlight any areas that could be developed further.

The LSE HR Strategy 2008-2012 actively recognised the invaluable contribution of all of our staff, and LSE’s reliance on the quality and adaptability of each and every individual to fulfill its aims. This Performance and Development Review (PDR) Scheme is a crucial component of this strategy and pivotal in the school-wide framework for effective and positive performance management.

In 2009-10, based on the feedback from managers and staff, we have revised the Scheme and introduced some important changes.

The overall aims of the scheme are:

- to enhance organisational performance in line with our aim of delivering excellence
- to ensure that performance and development management is central to the relationship between a manager and their staff
- to ensure that performance and development management is applied consistently and is integrated with other School processes and procedures
- to provide a framework for regular meetings between the reviewee and the reviewer which focus on the following: agreed objectives in line with School aims, performance in relation to these objectives, behaviour in line with LSE standards, personal and professional development needs and career aspirations and plans
- to enable all staff to have the opportunity to reflect at least annually on their performance and to discuss this with their line-manager and to develop their skills in line with the aims of the School.

The scheme will only be successful and meet these aims if all staff are committed to active participation in the scheme. Every individual has an equally important part to play in making it work.

We hope you find the scheme valuable in helping you get the most out of your time at LSE.

Adrian Hall
Secretary and director of administration, LSE
Benefits of the scheme

**To the individual**
- Understand your role and how it fits in with the School
- Understand what is expected of you
- Feedback on your performance
- Clear objectives
- Recognition for success and good performance
- Opportunity to discuss development areas
- An opportunity to discuss your future career aspirations
- An evidence based, two way dialogue for exchange of views
- A development plan and folder.

**To the reviewer**
- Two way dialogue for exchange of views
- Comprehensive, robust system examining all areas of performance
- A framework for assessing behaviour
- Helps to build relationships with reviewees
- Clear process for setting goals and ensuring commitment and accountability for meeting those goals
- An opportunity to recognise high performers (as part of an ongoing process)
- An opportunity to spot talent across the department
- An opportunity to assess overall departmental development needs.

**To the School**
- Links an individual’s performance to the Department and the School’s strategic aims
- Harnesses an individual’s contribution to the wider aims of the School
- A framework for the consistent review of performance
- Sets standards of performance and behaviour
- Staff are developed to fulfil their potential in line with the requirements of the School
- Improved communication between the School and the individual
- Increases employee engagement and motivation
- Better focused training and development.
Principles and key features of the scheme

These include:

- the scheme is owned by both parties and will be based on a two-way constructive and positive dialogue
- the scheme will be fairly and consistently applied to all support staff. HR will liaise with any departments who already have their own scheme in place to ensure consistency
- this Scheme is integrated into other organisational processes for example, the Service and Departmental Development Plans
- all salaried support staff are entitled to a PDR meeting
- everyone will have a PDR folder to keep a record of their meetings and for their personal development plan
- the scheme is based on an annual, structured but informal meeting with a six month interim progress meeting
- the system covers performance, personal and career development
- the discussion will be evidence-based
- there will be a significant element of self assessment

- performance is assessed on the achievement of objectives, assessment of behaviour in line with KSBs (knowledge, skills, behaviours) and a complementary framework of behaviours for non-managers
- it will include the identification of training needs and other ways of supporting staff
- to ensure fairness and equity, a senior manager will review the completed PDRs
- a summary of training and development needs will be collated at department/division level and forwarded to the Staff Development Unit to inform planning to meet departmental and organisational developmental needs
- there will be a publicly available school-wide timetable for PDR meetings
- it is not intended that this Scheme will replace other one-to-one meetings, but be part of a regular constructive feedback process and a key stage in the recognition of achievement of objectives and the identification of learning and development needs
- the PDR scheme is not directly linked to processes which determine pay or grading, for which LSE have clear procedures (please see the HR website for more information). However, evidence collected at the PDR meeting may help in preparing other submissions.
The logistics of the annual PDR

Planning, carrying out and following up on the annual PDR cycle

Before the meeting
In order to get the best out of this process, preparation is essential. Your reviewer should agree a suitable date, time and location for the review meetings, giving at least three weeks’ notice.

Ask your reviewer if you need any help or guidance completing the forms.

Complete the PDR form and forward it to your reviewer, ideally at least a week before the meeting. This enables time for it to be read and considered before the meeting.

Additional sources of feedback from colleagues and service users (see page 10)
Managers will need to decide if they want to use the Additional Sources of Feedback Option in their department and if they do want to use it, establish internal time-scales for completion. We would suggest at least six weeks lead-in to this. If Additional Sources of Feedback is to be used, individuals should be informed at an early stage so they can begin preparing for the process.

The meeting
This is the heart of the PDR process and it needs to be a positive and constructive experience.

The meeting usually lasts between an hour and an hour and a half.

Make sure all relevant documentation is to hand, for example; the PDR, any previous PDRs and the latest job description.

Run through your self-assessment summary, including achievement of last year’s objectives and the behaviours. Your reviewer will respond and give feedback, so that you can discuss your performance together.

You will then move onto the coming year’s objectives. You should have drafted some suggested objectives which will then be discussed and agreed with your reviewer. They will also discuss what is expected in terms of behavioural standards for the coming year. There will be an opportunity for you to give feedback to your reviewer.

Finally, there is a discussion about training and development and broader career aspirations, taking the previous two sections into account.

After the meeting
Your reviewer will complete the assessment form and then forward it back to you. Read this form and add any comments or changes and send it back to be finalised.

The reviewer will forward the finalised form along with other PDR forms to the appropriate senior manager.

The reviewer will provide the senior manager with a summary of the key development themes raised through the PDRs they have completed.

Keep a copy of the finalised form in your personal folder.

Post PDR meetings
It is suggested that each manager shows their completed PDRs to their manager and provides the senior manager with a summary of the team’s development needs. The senior manager will then review all the completed forms for consistency of approach, acting as ‘grandparent’. There is likely to be more than one senior manager in each division/unit, overseeing the PDRs of their teams. It is not likely that the most senior manager (normally Director) will see each individual form. However, they are responsible for ensuring that everyone in their department has had a PDR meeting and it has been carried out to a satisfactory standard. They will also then collate and forward to the SDU all training and development requirements.

The senior manager will oversee the storage and filing of these documents and is responsible for working with SDU to ensure that they are progressed.

The six month interim review
Good practice dictates that the reviewer and reviewee will meet throughout the year to review progress. This should happen at least once. No paperwork is necessary at this point, although the meeting should be planned in advance to support appropriate preparation by both parties, based on the annual PDR. At this point they should take time to consider the progress made towards achieving the agreed objectives and any associated training needs, allowing scope for any unexpected issues to be addressed.
Reviewer books PDR meeting (at least three weeks before)

Is department using additional sources of feedback?

YES

Reviewer and reviewee discuss sources and send out feedback requests

NO

Reviewee drafts the PDR form and forwards it to reviewer ahead of the review meeting with all feedback as appropriate (at least a week before)

Reviewer collates feedback

Review meeting
Reflecting – review of last year
Looking forward: planning for next year
Development

YES

NO

Reviewer completes summary and forwards back to reviewee for consideration

Reviewee adds final comments and sends back to reviewer

Reviewer sends completed form to Senior Manager for information

Reviewee keeps a copy of completed form for reference

Senior manager sends collated development and training needs form to Staff Development Unit

Reviewee arranges and carries out a six month interim review with the reviewer

Is all feedback received?

YES

Reviewer chases feedback

NO
The meeting will be structured according to the order of the form to enable you and your reviewer to explore your views and the key issues. Your reviewer will provide a welcome and introduction to make the meeting start easily, and clarify its purpose, format, timing and agenda. They will also summarise the main action points at the end of the discussion and clarify the ‘next steps’, with associated timelines.

The reviewer’s role
- allow sufficient time to prepare
- make sure you complete the paperwork at least a week before the meeting
- be confident. This is an opportunity for you to have an open and honest conversation with your manager
- be prepared to have a two way dialogue
- state your views constructively – Use ‘I’ statements such as: ‘I find this works well’, ‘I believe we need to look at this issue again’ or ‘My view is’
- put forward suggestions
- ask questions if you are not clear about something
- reflect on your successes last year and those areas where things could have gone better
- reflect on how far your behaviour has met the frameworks set out in the scheme
- give thought to what you would like to achieve in the coming year – what do you need to help you achieve these objectives, what is hindering you
- identify how your manager could help you achieve your objectives
- research development activities which would help you in your role.

The senior manager’s role
- ensure your managers are aware of the divisional strategic plans and ‘cascade’ these to their teams.
- lead by example and carry out the PDRs for your direct reports in good time
- remember your role as an overseer and check regularly on progress of your managers’ completion of their PDRs. If they have not done them, work with them to get a plan in place to complete them
- when you receive the completed PDRs, check the quality and consistency. Is there any unfair bias in them?
- your role is not to re-run the whole conversation that has happened, rather to familiarise yourself with what is going on. You should encourage your managers to deal with any problem performance (and then support them in dealing with these issues) but also, if you see any outstanding PDRs – perhaps congratulate the person for their year’s effort
- the senior managers are also responsible for completing the form regarding training and development needs for the department and forwarding it to SDU.

The reviewee’s role
- allow sufficient time to prepare for the meeting and have all relevant information ie, all previous PDRs, Job Description, notes of 1-2-1s and meetings
- in terms of preparation – think carefully about what you want to say and what changes, if any, you want to come about in terms of a member of staff’s performance
- remember each reviewee is an individual and recognise different motivational needs
- remember to be open and constructive, basing performance comments on specific examples ie, evidence and ensure that there are ‘no surprises’
- use praise and find motivational ways of thanking people and recognising their effort
- give oral and written feedback in very clear, specific ways which will help the reviewee understand exactly what you mean
- find ways of giving clear feedback which does not deflate people
- If you disagree with the reviewee’s comments, then say so clearly and professionally. Use phrases like ‘I see it differently’ and be clear and concise with your supporting reasons
- make your contribution but remember this is the reviewee’s time so allow them to speak the most. If you feel the conversation is getting confused or a bit stuck, feel free to summarise, or ask your reviewee to do so.
- do ask for feedback on your own performance as a manager, this is a two way process
- be open to constructive criticism – you may be the source of someone else’s stress or poor performance and you will need to deal with this positively
- be prepared to constructively re-focus any objectives in line with the department’s/ services’s plans
- consider what support you can give to your reviewee in achieving their objectives.
- be aware of development opportunities available to help your team member.
The Reviewee

Self-assessment: last year’s objectives

In this section you are asked to describe how you have performed in key areas of your work over the last year, based on examples of the areas you describe. You should look back at the objectives you were set in the previous year to form the basis for your answers. It is a chance for you to openly and honestly reflect on all aspects of your achievement and areas that did not go so well. If you do not have objectives from the previous year, perhaps look at your job description and use this as a basis to provide examples of your achievements this year.

You will need to consider:
• what were last year’s objectives? What was agreed? How far did you meet those objectives?
• how effectively did you meet them? What were the highlights of last year? The successes and triumphs? What were the downsides or difficulties last year? Where was it difficult to make progress and why?

Self-assessment: LSE behaviours

This question asks you to think about what you have achieved again, but this time from the perspective of not WHAT was done but HOW it was done. It is not just a case of ‘the ends justifying the means’; it is vital for the School and all its members’ well-being that HOW it was done. It is not just a case of ‘the what’ was done or a challenge to live up to these values – when was that, what was happening to affect your performance? Overall how would you assess your behaviour under these categories?

Behaviours for managers

Managers may choose to complete the KSB questionnaire which forms a self-assessment of their behaviour in line with the framework. Or, they may choose to write evidence against the points below, which are derived from the KSB framework. Whichever way, this should be established with their manager at the start of the process.

The four key behaviours for managers as described in the Knowledge, Skills and Behaviours (KSBs) are:
• leading by example
• excellent customer service
• continuous learning.

Examples of behaviours (taken from the KSBs) – managers

Leading by example
Has a clear vision and share it with staff
Is committed to performance excellence
Seeks to be motivational and encouraging

Has open and transparent communications
Creates constructive and respectful relationships
Recognises that diversity and difference are assets
Seeks to ensure all staff are treated fairly
Takes responsibility for own action
Creates a no blame culture and role model learning from mistakes
Demonstrates a consistently positive attitude to work

Team-building
Identifies team strengths and areas for development
Builds effective teams
Provides opportunities for creativity and innovation
Involve and empowers people through inclusion in decision-making
Encourages health and well-being
Encourages staff participation in teams outside their immediate work group
Recognises and celebrates success

Excellent customer service
Seeks feedback from internal and external customers
Acts on feedback from internal and external customers
Seeks ideas on performance improvements
Puts in place performance improvements

Continuous learning
Seeks feedback on their own performance and be open to constructive challenge
Models continuous and life long learning
Shares their learning with staff
Coaches others and creates a coaching culture
Recognises talent and develops staff potential

Behaviours for non-managers

The four key behaviours for non-managers which are based on HERA and are complementary to the behaviours identified by the KSBs are:
• proactive and supportive team member
• excellent customer service
• initiative and problem-solving
• continuous learning.
Examples of behaviours (complementary to KSBs) – non managers

Proactive and supportive team member
- Supports colleagues in need of extra help and assistance
- Understands how role fits into team and department’s objectives
- Is aware of impact on colleagues
- Responds well to situations that occur without supervision
- Acknowledges the achievement of colleagues
- Provides assistance to others without waiting to be asked
- Accepts help and advice from others
- Takes responsibility and is accountable for own actions
- Is reliable and dependable
- Is aware of equality and diversity – treats all colleagues with respect and courtesy
- Demonstrates a positive attitude to work and the School

Excellent customer services
- Helps others beyond their expectations and reacts appropriately to unexpected events and queries
- Accepts feedback from customers in a positive way and takes action to improve accordingly
- Provides accurate and timely help
- Treats customers as individuals and respects differences
- Is empathetic and respectful of customers’ needs
- Communicates clearly and politely with customers
- Takes responsibility to ensuring customers’ needs are fully met

Initiative and problem-solving
- Is open to new ideas and willing to make changes to role and performance as required
- Responds positively to, and is involved in, changes in the workplace

An individual should probably have between four and seven objectives. Some larger objectives can be split into sub-objectives if that is useful. For those people with several projects to manage in the coming year, it may be helpful to have a separate objective for each project. Managers, however, need at least one objective which relates to the management element of their role.

What makes a good objective?

Good objectives should be written positively for example ‘increase customer satisfaction’ or ‘develop a new communication plan to market a new Master’s course’. You should also concentrate on the outcome or result that you are seeking – not the tasks you need to complete. You will also need to work out how you will know when the objective has been successfully achieved. Identify the deadline and any significant milestones along the way. The outcome or result that you are seeking needs to be measurable.

The tried and tested adage for objectives is SMART:

Specific – state precisely what you need to accomplish, do not be vague
Measurable – the outcome or result needs to be measurable. Avoid vague or subjective measures which are difficult to assess
Achievable – it is realistic? Whilst it is appropriate to have some objectives which may stretch people on the other hand, make sure it is achievable and appropriate for the post-holder
Relevant – Is it up-to-date? Does it reflect current needs? Does your objective fit in with your overall team plan/SDP/DDP?
Timescale – has a date been set for achievement of the objective and is it achievable? For large objectives set interim target dates as deadlines too far into the future can be overwhelming.

Well set objectives ensure everyone is aware of what needs to be achieved in terms of performance, when it will need to be achieved by and how the achievement will be measured.

Examples of well-written objectives:
- to devise and implement procedures for monitoring student attendance and for collecting student assignments by end October this year
- to organise work in ways that may save time and take action to improve accordingly
- to seeks feedback on their own performance and is open to constructive feedback
- to sets a positive example and encourages others to develop
- to demonstrates a positive attitude to work and the School
• to introduce PDRs for all levels of staff into the... section by December this year.
• to introduce monthly team meetings for all staff by the end of September this year.
• to re-write the internal communication policy by the end of the December.
• to prepare and present the annual... Presentation using Power Point by August 2011.
• to review the procedures used for course evaluation and bring forward proposals for change to the meeting of the Board of Studies in November 2010.
• to restructure the... Section in line with changing priorities and new department structure by December this year.
• to complete 95 per cent of priority jobs within publication timetables.
• to design a database to record customer queries by September this year.
• to reduce waste from standard maintenance jobs by 5 per cent in 2011.
• to reduce the number of student complaints by 10 per cent by amending website and office notices to provide clear office hours.
• to initiate and report on student suggestion box at reception by June this year.
• to summarise the cause of complaints to the Department management meeting in December each year, with recommendations to resolve issues.

Identifying development needs
What is a development need?
This may be a gap in someone’s experience, a weakness or a strength that could be further developed. Development needs should be linked to the performance objectives for the coming year as they may require new ways of working or new behaviours.

How can this be addressed?
Many people think development needs can only be met by attending training courses. Whilst this is sometimes the case, in fact there are many other (more) effective ways of developing people. These include:

- Project work
- Coaching
- Work shadowing
- Exchanges with other departments
- Presentations
- Researching a particular topic
- Job/task role rotation
- Membership of committees and working groups
- Online learning
- Moodle online learning
- Representing the department in the wider university community
- Secondments
- Unpaid sabbaticals
- Volunteering in the community

It is a good idea to agree the best way to support any development needs. Most people do not like being put forward for training courses without their agreement. Furthermore, people have different learning styles and this too needs to be taken into account when determining how to address development needs.

Training Plans
One of the features of the new PDR scheme is a more structured way of feeding back development needs to the Staff Development Unit in HR. This is to ensure that the School’s needs can be met in a more systematic way. Your manager will collate your department’s training needs which will be forwarded through to SDU by the beginning of May each year.

It is the manager’s responsibility to complete the training needs summary sheet when they have completed all the PDRs. The form should then be sent to the Senior Manager who will collate the division/department’s training and development needs before sending it on to SDU.

Longer term career goals
The aim of this section is to find out how the LSE can support individuals with any longer term career goals they may have. However, many people have not yet thought this far ahead, or would prefer to concentrate on a more short to medium term time frame as part of career planning. Others see it as a personal matter which they would not wish to share with their line manager.

If a reviewee chooses to complete this question, the reviewer and reviewee can then discuss how LSE can help with personal career goals.

Volunteering in the community
Researching a particular topic
Presentations
Exchanges with other departments

Optional feature: additional sources of feedback
This is an optional element of the PDR scheme and may be valuable to everyone to provide a wider or different perspective.

The guidance below outlines a safe framework which enables departments to open up new sources of feedback and look at other people’s perceptions of staff performance.

It can help reviewer and reviewee to see some aspect of performance that they were not aware of or had not fully taken into account.

It is optional – the department may or may not choose to use it. It is particularly helpful for those departments which have outward facing roles or where there is a strong element of service delivery. It helps in giving a more holistic picture of performance. It can also build staff confidence.

Where it is used, we would recommend that reviewers use it for the whole team and do not single out individuals.

The process is quite intense both in terms of time and energy for those involved in the process. We would therefore recommend that this is carried out no more than once every three years.

If you would like to discuss with someone in HR how to use this process, we would be very happy to talk to you. Also, for those who are considering the more in depth, full 360 degree feedback model, please contact HR for further information.
The Framework:
You will firstly need to discuss and decide the list of people who will be asked to give feedback. A minimum of six is recommended. It is a good idea to have a range of people to give feedback, for example fellow team members, colleagues in other sections or departments and service users.

Unlike other aspects of this PDR, there may be some surprises for both the reviewer and the reviewee. It is therefore important to follow the framework for feedback to ensure that individuals feel safe throughout the process.

The feedback from the peer reviewer should be based on their perception of working with the individual and should include three strengths and one development area. It should be evidence-based and provide specific examples of working with the individual. The feedback should be given in a standard form and copies returned to the manager.

This is not a confidential process and peer reviewer’s names will be disclosed. The rationale for this is two-fold. We wish to encourage open, transparent and constructive feedback so that the peer reviewers must therefore own the feedback they give. Also, the feedback will be based on real examples and so it would be impossible to hide the identity of the reviewer.

Manager and individual will consider the feedback and identify any common themes or patterns. It will also be used as supportive communication for the appropriate areas of the PDR form. They will also discuss the implications of the feedback for the previous year’s performance and also for the coming year.

The feedback forms will be stored in personal PDR folder and also centrally in the division’s system.

Support available and who to contact for more information

Comprehensive training is available to support the launch of the new scheme. A Moodle site has also been set up with access to all the documentation that supports this training programme and the process as a whole.

Up to date information on the support in place is available at:
lsa.ac.uk/intranet/staff/home.aspx

Summary
The revisions to the PDR scheme were based on the feedback we received from managers and staff across the School. We have endeavoured to integrate these ideas into a revised Scheme which we trust will be responsive to everyone’s needs.

This revised PDR scheme will help clarify individuals’ roles in line with the School’s strategy and objectives. It will contribute to creating an expected level of performance and allows for fair and constructive assessment of individuals against these standards. It will open up the process to wider sources of feedback and thereby help develop understanding and confidence between staff and service users. Finally, it will streamline the planning processes for training and development across the School.

We trust that managers and staff will find this scheme allows them to have positive, motivational discussions about performance and that this scheme will help everyone to perform at their best and fulfill their potential.

Good luck! We look forward to working with you and hearing how you get on!
How to give feedback

We don’t want this to be formulaic or difficult for you. We want this to be a positive conversation which is motivational for the reviewee.

Giving feedback is an art. Some guides suggest that you follow the sandwich formula – give the good news, followed by the bad and then end on the good news! The trouble with this, is that it is very formulaic and people start to predict what you are going to say next… ‘OK, he has said something nice; he is buttering me up about the bad news…’

Here are some principles which will help provide feedback:

Prepare your feedback in advance. Think about what they have achieved, what has not gone so well, what are their strengths and their weaknesses in relation to the expected behaviours?

Make sure you have positive feedback to give someone – don’t take people for granted.

Stick to real, concrete examples. This will ensure that your feedback is evidence-based.

Try to be as descriptive as possible rather than judgemental. Rather than saying ‘you are fantastic’ or ‘you are really slow at inputting data’ use ‘I’ statements such as ‘I realise I rely on you a great deal when it comes to managing the front desk. I have noticed that you are very skilled at handling all the queries we get… for example’ or ‘I have noticed that you seem to take longer than others at data-entry and you can seem to me a bit tense when you have to do this… for example last month…’

If someone has done well, be fulsome in your praise. Most managers tend to be very cautious about praise, so do not hold back.

Make sure though that your praise is genuine.

What about negative feedback?

Obviously, there will be a few people whose performance has been exceptional and who do not need negative feedback. Do not fall into the trap of finding a blemish on someone whose overall performance is truly excellent. This can be very demoralising.

However some individuals will not have completely positive feedback. Negative feedback is important but only where it is needed. If you have to give a bit of negative feedback first make sure your feedback is balanced (both positive and negative) and then focus on the top three priorities where change or improvement is needed. Stick to three priorities, even if there are more, because any more will overwhelm the reviewee. Remember though that negative feedback from the manager should not come as a surprise at the PDR meeting. Do not raise a new issue with someone at this stage of the process.

Negative feedback should be precise, specific and evidence-based. Concrete examples rather than emotional responses should be the basis of the conversation which should serve to help understanding and identify ways the reviewee can improve.

Final word on feedback

Listen to what your reviewee has to say and do not get drawn into disputes about interpretations of performance. Occasionally you will find that you will not agree with your reviewee.

Career development

This is an area that individuals react to differently because people’s attitudes towards work vary enormously. This can make formal discussions in personal development review meetings tricky. Some people are ambitious and are keen to pursue their careers – they may have a long term career plan. Other people’s motivation might be completely different: they may be motivated for example by the people or social side of work. They may be satisfied with their position at work and put a high value on their personal or family life and are therefore less keen to pursue their career any further.

Everybody should have the opportunity to talk about their long-term career but it is important that reviewers treat this subject gently. It is useful to have a sense of where your staff want to be in the medium and long-term in order to help you plan for the future and you may find you are able to help your staff to develop their career.

You must, however, recognise that your reviewee may not want to pursue this part of the discussion. Even if someone has a career plan, they may not be willing to share it with you. For other people this subject can make them feel uncomfortable. It is important, whilst giving everyone the opportunity to discuss this, to take the lead from them and not push people to talk about something they don’t want to!

It is also important to treat this subject carefully because someone may have unrealistic expectations of what you can do for them. Obviously in these circumstances, there is very little that a manager can do except listen and give some general careers guidance. Staff within the SDU may be able to help an individual in terms of careers coaching.

How to write a summary of the PDR meeting

The manager’s summary should condense the whole discussion. It should contain the following:

• a clear and easily understandable summary focussing on what has been achieved
• the overall strengths of the reviewee
• what is coming up in the new year in terms of objectives
• any behaviour changes needed and also
• how development needs should be met.

The style should be positive and constructive.
Dated March 2010. Replaces all previous versions.