

Information Service PDR guidance notes

The PDR process should be as simple yet effective as possible. It is an aid to providing focus for individuals on the objectives that are specific to them, it shows the behaviours they are expected to demonstrate and it identifies their aspirations. By assessing how individuals are performing against these objectives and behaviours and by taking into account aspirations and development requirements, it allows the formulation of a personal development plan and associated training needs. The onus will be on the staff member to complete the majority of details on the form.

Process

The process will take place over three meetings and will be timetabled as follows;

Stage	Detail	Date
1	PDR forms are issued to members of staff to populate draft objectives and timescales. The forms will be sent out by the Business Management team with the behaviours pre-populated and detailed in Appendix 1.	April 2011
2	A brief initial meeting is held to agree objectives and timescales. Staff member amends form accordingly.	May 2011
3	A 6 month review meeting is held. Prior to the meeting the staff member should self-assess against the objectives and behaviours by giving examples in the appropriate column. The staff member will also complete, at the same time, the support and development section with regards to aspirations, support needs and key achievements. At the meeting the line manager will give their feedback on these areas. From this the Personal Improvement plan is agreed and the 6 months review comments boxes on the last page are completed. Manager will indicate in the comments box, which assessment the staff member is heading towards.	October 2011
4	Any identified development needs are fed to SMT (via Business Management) for consideration	November 2011
5	A 12 months review meeting is held. Prior to the meeting the staff member should self-assess against the objectives and behaviours by giving examples in the appropriate column. At the meeting the line manager will give their feedback on these areas and both will complete the additional comments boxes.	March 2012
6	Moderation and feedback takes place at 6 months and 12 months. Final assessment is made at 12 months	Oct 2011/April 2012

Completion of the form

Front Page

The first part of this page contains the basic information regarding the staff member and details of meetings and will be completed by the staff member.

The final part of this page should be completed by the manager after moderation at 12 months. The line manager will make a comment on the last page of the form at 6 months to give an indication of how the staff member is currently doing.

Example:

Overall Assessment	Not currently meeting expectations	Meeting expectations	Exceeding expectations	Outstanding
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Ratings should be based on the following criteria;

Not currently meeting expectations	Just does as much of the job as is required to get by and has not demonstrated the behaviours. Has no positive impact on those around them.
Meeting expectations	Doing the job well and exhibits the required behaviours. Has a positive impact on those around them.
Exceeding expectations	Not just doing the job well, but adding value to the work they do and frequently exceeding the standards of the behaviours. Has a positive impact on those around them and regularly goes the extra mile to exceed expectations.
Outstanding	Consistently exceeds <u>all</u> aspects of the job role and consistently exceeds all the behaviours. Has a significant and positive impact on those around them and sets the example for others to follow. They can show tangible examples of where they have improved the work or perception of the service.

Section 1

When completing the PDR, consideration should be given to the Service Objectives. However the form does not include a section that ties the individual's objectives back to service plan's objectives. This is because it is not always easy to map an individual's objective to a relevant

service one, so this becomes superfluous as it is just done on a “best fit” basis. The service objectives which appear here are therefore only for convenience so they are available at a glance if required.

Section 2

This is where individuals specify their personal objectives and timescales before the initial meeting. These objectives and timescales are then agreed at the initial meeting.

Prior to the 6 month review the member of staff will self-assess their performance against this objective by giving examples. At the review meeting the manager will give their comment. A discussion can then take place to identify areas for improvement and associated actions which will form the basis for the Personal Improvement plan.

Prior to the 12 month review the member of staff will again self-assess their performance against this objective by giving examples. At the meeting the manager will give their comment.

Example:

Objective outcome	Time scale	6 month review		12 month review		Personal Improvement Plan
		Self-assessment	Manager’s comments	Self-assessment	Manager’s comments	
<i>Develop and implement an IT change control process.</i>	<i>Jun-11</i>	<i>Going quite well. I have developed a change process, issued to users and started to put changes through it.</i>	<i>Process is good but not every-one understands therefore needs more explanation and communication.</i>	<i>I have spoken to users and other staff to get their feedback on the process. As a result of this I have revised and tested the process.</i>	<i>The new process documentation is much clearer and the feedback from users has been very good.</i>	<i>Develop process writing skills and communication skills.</i>

Section 3

This section reflects how the staff member is performing against Information Service’s desired behaviours and will be pre-populated with the summary headings for the behaviours. A full description of the type of actions that underpin each behaviour can be found at the end of the form- Appendix 1.

Prior to the 6 month review the member of staff will self-assess their performance within each group using the details section to give examples. At the review meeting the manager will give their comment. A discussion can then take place to identify areas for improvement and associated actions which will form the basis for the Personal Improvement plan.

Prior to the 12 month review the member of staff will again self-assess their performance within each group using the details section to give examples. At the meeting the manager will give their comment.

Example:

Behaviour	6 month review		12 month review		Personal Improvement Plan
	Self-assessment (including examples)	Manager’s comments	Self-assessment (including examples)	Manager’s comments	
<i>Prioritising and Delivering; Conscious about using resources. Tries to eliminate waste.</i>	<i>I believe this is something I do well and an example of this when I asked attendees at the team meeting not to print agendas for the meeting</i>	<i>Whilst this is a saving on paper it would be better rolled out</i>	<i>I have met with people from other teams. I have promoted this as a</i>	<i>I have had feedback from the other teams that they were impressed with the</i>	<i>More confidence in having this type of conversation.</i>

	<i>and I displayed it on a data projector. I think other teams should do this but I'm not sure they would listen to me.</i>	<i>across the whole department.</i>	<i>cost saving and persuaded everyone to agree not to print out agendas.</i>	<i>way this was promoted and a good result was achieved.</i>	
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Section 4

This section identifies the support and development a staff member feels they need to improve their skills to do their current job and/or new skills to enable career development. It also highlights their achievements and therefore strengths.

<u>Area</u>	<u>Comments</u>	<u>Actions agreed with Line Manager</u>
Aspirations	<i>I am an IT Assistant and would like to increase my technical knowledge to be better equipped to help customers.</i>	
Support (What could your Line Manager do to support you and remove barriers)	<i>I would like my Line Manager to support me by allowing me time to work with the Support Technicians to increase my knowledge.</i>	<i>One afternoon a month can be spent with technicians.</i>
Development (What activities could be undertaken as part of the personal development)	<i>As we will be moving to a newer version of Sequel and I would like to have training on the new version.</i>	<i>Relevant training course to be identified and put forward for consideration.</i>

<p><u>Line Manager's comments</u></p> <p><i>This staff member is currently headed towards an assessment of: Meeting expectations.</i></p> <p>Signed.....</p>	<p><u>Line Manager's comments</u></p> <p>Signed.....</p>
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