

## **Personal Development and Review (PDR) Scheme Information for Staff**

### **The PDR Scheme**

1. The intention is that the PDR scheme will build on existing staff management processes, such as one-to-one discussions and team meetings, and will form part of a continuing dialogue between an individual and their line manager.
2. The scheme will integrate support for individuals with the achievement of the objectives of the Department.
3. The scheme will apply to all administrative, technical and research support staff who have completed their probationary period. Academic and research staff are covered by alternative schemes.
4. The scheme will involve a confidential annual review discussion, which would normally be conducted by an individual's line manager.
5. There is no direct link between the scheme and salary, promotion, or discipline, for which there are separate University procedures. However, if it appears that your job has changed, the PDR can act as a prompt to update your job description.
6. The review, apart from passing on information about training needs and other points requiring action by the department, will be kept confidential.
7. Reviewers will be provided with guidance and have the opportunity to meet with the HR Manager if required, before holding PDRs.

### **The PDR Process**

1. PDRs will be conducted on an annual cycle which should be completed by 30 September each year. It is anticipated that the majority of meetings will take place during July, August and September.
2. The HR Manager will contact reviewers to confirm the names of the staff they are due to review. PDR forms will be sent to reviewers and will also be available to download from the Materials website.
3. The reviewer will arrange a suitable date for the meeting with the reviewee. The meeting should take place in a venue where you both feel comfortable and where the discussion can take place in confidence. The meeting will generally last around an hour.

4. The reviewee should complete Form A in advance of the meeting, ensuring that it is sent to the reviewer at least one week before the agreed date of the review meeting.
5. The reviewer will lead the discussion based on the information provided in Form A. The reviewer will invite the reviewee first to give their own reflections; and then follow up with their feedback.
6. The principle of “no surprises” applies to the PDR meeting. This means that if a line manager has any concerns about their reviewee’s work, this should be discussed prior to the PDR meeting. Similarly, the reviewee should not “save up” any problems or concerns until the PDR meeting – these should be raised with the line manager as and when they arise.
7. When identifying training and development needs, consider options such as taking on additional projects or tasks, mentoring, or work shadowing, in addition to attending training courses.
8. The reviewee should take notes during the meeting, as they will be responsible for writing these up. The reviewee should then complete Form B after the meeting.
9. The reviewee can add any additional comments if they wish. Once the form is completed and signed, the reviewee should pass it to the reviewer. Where there are differences of opinion between the reviewer and reviewee, these can be recorded in the optional comments boxes.
10. Once completed and signed by the reviewer, please send Forms A and B to the HR Manager ([tom.lake@materials.ox.ac.uk](mailto:tom.lake@materials.ox.ac.uk)). The reviewer should also give a copy of the final PDR form to the reviewee. The reviewer should retain a copy of the form and must ensure that completed PDR forms are treated as confidential and kept in a secure place. In subsequent years the summary of the previous year’s meeting will inform completion of Form A by the reviewee.