PDR and CDR Essentials

PDR and CDR

An annual conversation that is dedicated to personal and career development, with the opportunity to agree goals and objectives and creating an environment in which feedback can be heard and received. PDRs and CDRs take place between a reviewee and a reviewer and the process is intended to prompt both parties to:

- reflect on what has been achieved since the last review
- ensure that staff know how well they are performing, and are supported and developed so that they are effective in their current role
- plan ahead over a longer time period, taking into account the group or department priorities
- identify learning and development needs and solutions
- discuss any career aspirations that the reviewee wants to share
- consider any other work related issues that need to be addressed (such as barriers to achievement,
- resources, buildings, working relationships or suggestions for process or system changes)
- follow up with regular one to one conversations during the year
- key mechanism in enabling the University to cascade objectives from one level to the next, down to the individual so that everyone is ultimately focused on achieving the University's strategic goals.

The principles of PDRs

The **PDR Principles** are defined at University level; some key points are:

- A PDR discussion doesn't replace the need of regular in-year reviews with the line manager
- The quality of the PDR conversation is paramount. Preparation is key and the reviewer needs to be properly equipped to undertake the review
- The principle of 'no surprises' should be followed:
  - Neither party should introduce anything substantial not already shared
  - PDR is not the place for the reviewer or reviewee to raise negative feedback for the first time.
  - Additional topics may emerge for discussion e.g. an out-of-date job description. If necessary these should be noted and discussed either in an extended PDR meeting or in a separate discussion.
- There is no direct link between the review process and probation, salary, promotion, or discipline, for which separate procedures exist.

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The PDR process

1. The reviewee prepares for the PDR conversation by completing the PDR form ahead of the PDR meeting. This encourages consideration of:
    - Reviewee's achievements over the last year;
    - Any changes in their responsibilities;
    - Any progress or barriers in meeting objectives, training and development activities;
    - Workload and their working environment.
    - Propose objectives for the next year, and any training required in order to meet these.

2. The reviewee sends the PDR form to the reviewer, to which the reviewer adds their own reflections.

3. Both parties meet, using the form as a discussion prompt for the PDR conversation and agree a set of objectives and training needs for the coming year.

4. These objectives are reviewed at regular one to one conversations during the year and revised as needed.

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Reviewees' responsibilities and preparation

Reviewees are responsible for:

- Reviewing and assessing their own performance since their last PDR
- Listening to feedback and considering it objectively
- Proposing and agreeing objectives and priorities for the coming year
- Putting any agreed personal and career development plans into action
- Offering constructive feedback on the working relationship and the working environment

PDR for Reviewees: guide for reviewees on how to make the most of their PDR and have effective career conversations.

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Reviewers' responsibilities and preparation

Reviewers are responsible for:

- Arranging PDRs for all eligible staff
- Ensuring that timely and effective feedback is provided during the year
- Contributing their review and assessment of the performance of the individual
- Leading a constructive conversation that agrees objectives for the coming year
- Agreeing any appropriate support to enable the reviewee to achieve agreed objectives
- Agreeing relevant learning and development needs
- If appropriate, supporting reviewees in creating a career development plan
- Ensuring that an agreed written record of the meeting is created
- Agreeing any amendments to PDR objectives during the year

PDR for Reviewers: guide for reviewers on their role in the PDR, how to agree objectives, learning and development conversations, and career conversations with members of staff.

Specific CDR resources for Reviewers

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PDR: a selection of key competencies

| Giving effective feedback | Holding a career and development conversation | Setting objectives |
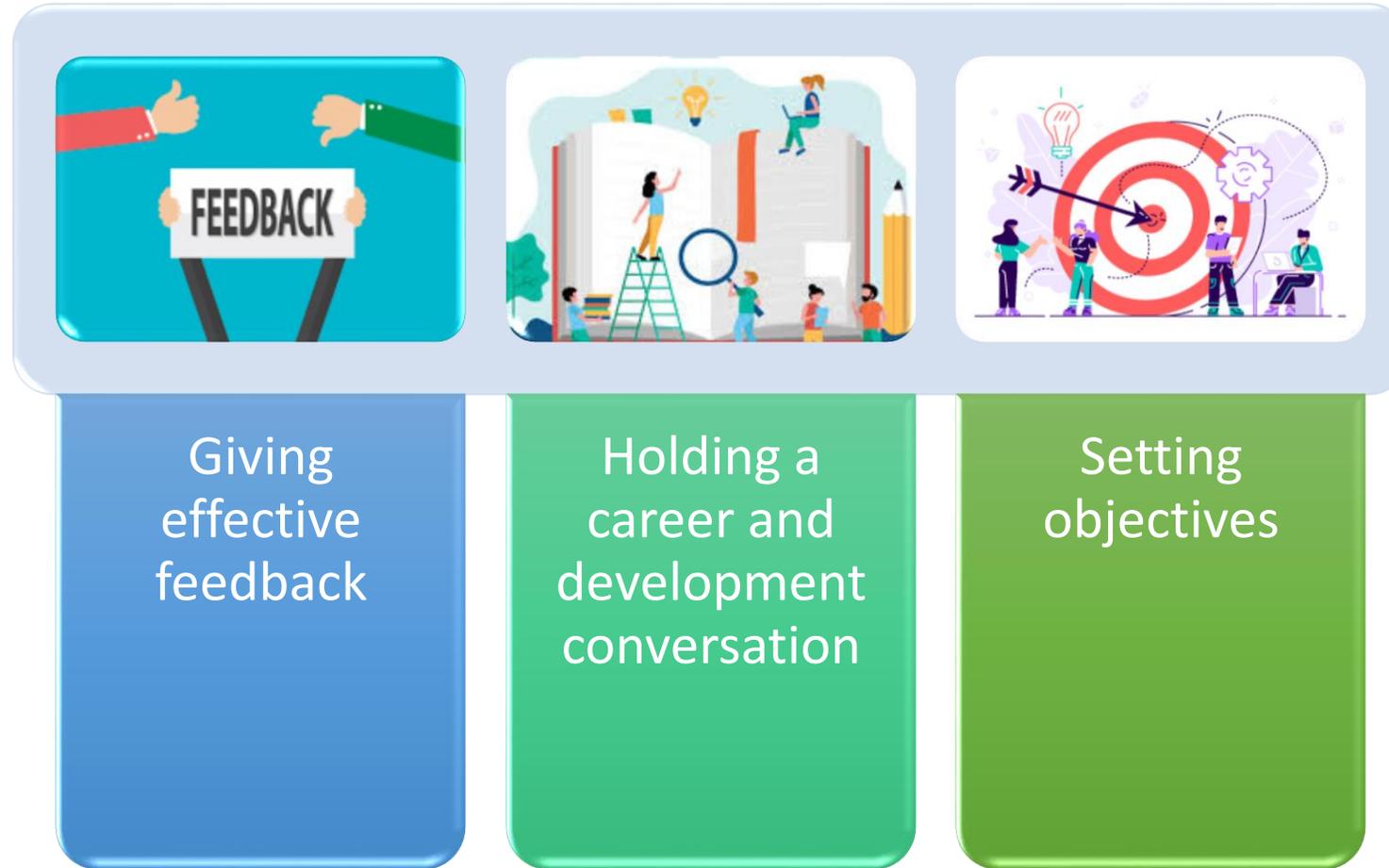
Giving Effective Feedback

Start with the Positive

- Start with what the employee has done well. We tend to internalise criticism much more than compliments. Therefore, when you frame a criticism positively, employees are less likely to take it personally.

Be Specific

- Avoid making generalised evaluations about something and asking vague questions. Put as much detail into your comment as possible to make it specific and actionable.

Be Objective

- Always focus on factual information and justify your feedback, especially if it's negative. Try not to base your judgment on subjective information and personal feelings and emotions.

Giving Effective Feedback

Give Actionable Advice
- It is pointless to criticise work if you don't say how to improve it. Always give pointers to work on and follow up feedback.

Make Feedback Frequent
- Aim to give feedback frequently – don't wait for a PDR to let an employee know their progress. Especially important if you're not happy and if you don't give feedback close to the time, they will keep making the same errors.

Communicate face-to-face
- Provide feedback face-to-face where possible. This gives the employee the chance to ask questions and makes your feedback much more genuine.

More information: Giving feedback

Giving Effective Feedback

Benefits of Feedback in the Workplace

- **Increased motivation** – Staff feel appreciated and more motivated.
- **Greater performance** - Staff know their efforts are valued and they know the areas for improvement.
- **Continuous learning** – Staff learn new ways to do things.
- **Improved relationships** – Staff are much more likely to discuss problems if they know you take note of their activities.
- **Personal growth -** Positive and negative feedback shows staff their strengths and areas to work on. This makes them more self-aware and provides opportunities for personal improvement.
- **Increased confidence.** Staff gain confidence when you tell them they've done something well.

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Career Conversations

- Reviews are encouraged to talk about their career and development aspirations ([Career conversations for managers](#))

- Don't assume that career ambitions should always contemplate a promotion. Remember **aspirations are many and varied**. Some people may want to broaden their current skills or building on their current skills

- Listen actively. The majority of the Career and Development conversation will be the individual talking. Your role is to listen, understand and offer support without making assumptions or judgement

- Help them to examine their ideas about themselves, their careers and possible future directions by asking open questions. Pick up on ideas which fit with business needs and share information about possible opportunities in the business

- Specific [career resources](#) for researchers

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Step Up

Broaden

Deepen

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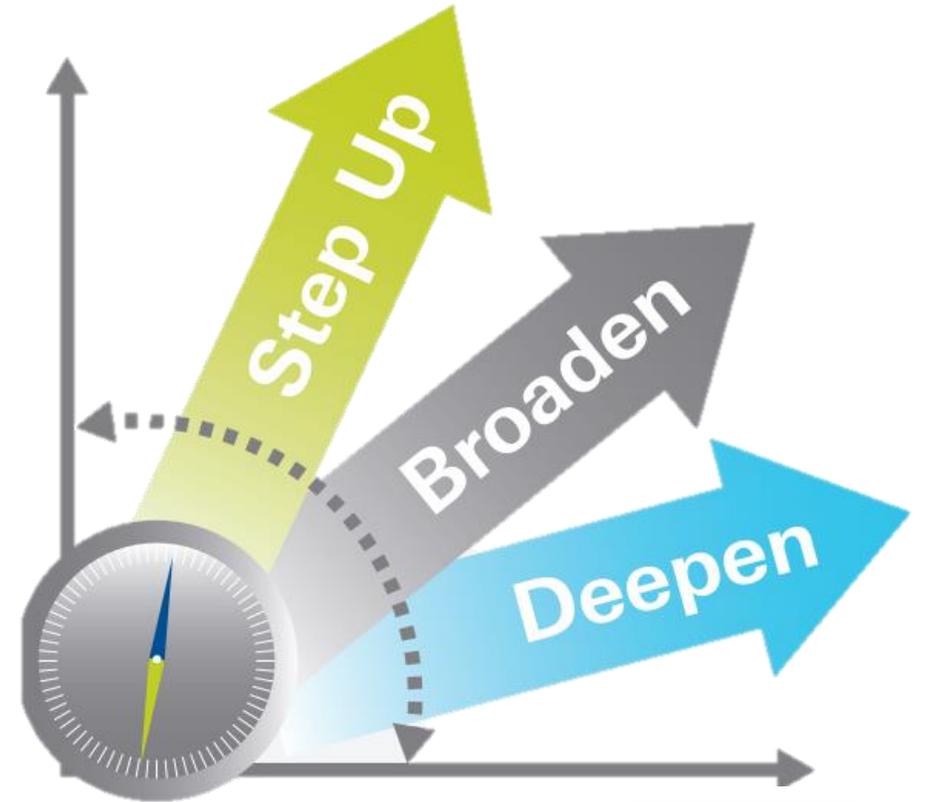
Career Conversations

- Manage expectations at the start of the conversation about the extent to which you and the University will be able to support the individual. Focus on what can be done rather than on restrictions

- Create a safe and supportive space for the individual to share their views and aspirations

- Offer ideas on next steps if asked: e.g. what to do or who to talk to but don't stray in to telling the individual what to do

- Leave enough time at the end of the conversation to summarise and confirm actions and next steps. Remember to follow up quickly on any actions from the meeting. Don't agree to something you can't deliver on.

- Remember: a reviewee's career plan is their responsibility

Development Conversations

- The primary responsibility as a reviewer in terms of learning and development is to ensure that your people have the skills they **need** to do the job they are required to perform.

- Reviewees may bring aspirational training to their PDR. Your role is to distinguish the **needs** from the **wants** and make sure you focus on the **needs** first. (Learning & development conversations for managers)

- Remember that meeting learning and development **needs** is not only about attending a course. There are lots of activities you can suggest either within or outside the workplace to learn and develop skills and knowledge. Examples include: work shadowing, secondments, serving on committees, coaching, job rotation, project work or volunteering

- More resources on Developing others

- More resources for Researchers

Objectives (not relevant for CDRs)

Department Objectives

- Departmental Review 2018

Your Team's Objectives

- As a Manager, what are your objectives for the Year for your Team?
- Do they meet the Department's objectives in your area of responsibility?
- Do they meet your Manager's objectives in your area of responsibility?
- What additional objectives do you have?

Objectives (not relevant for CDRs)

Individual Objectives (3 or 4)

Maybe:

- Work related
- Training & Development
- Addressing area of weakness or interest
- Non-work related (personal development)
- Alignment with Team, Department (and University) objectives

Objectives

S
- Specific
- Set out exactly what is required, do not be vague but set out clearly what the objective is and how it will be achieved

M
- Measurable
- Use a quantative method (numbers) rather than a qualitative measures (poor, good, very good, excellent, mean different things to different people) which are difficult to agree on.

A
- Agreed/Achievable
- Ensure that the person setting the object agrees that it can be achieved and define any obstacles that might stop reaching the objective

R
- Responsible/Realistic
- Name a responsible person not a group and make sure the objective is realistic and relevant to the person's role

T
- Time limited/Target Date
- Set a date when the objective should be completed e.g. December 31st or Feb 5th

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