

**P&DR Checklist**

**For managers conducting P&DR**

Performance & Development Review is mandatory for all staff on an annual basis. The focus of P&DRs is to review achievements against agreed objectives and identify learning and development needs to support the achievement of organisational goals.

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| **Considerations & Preparation** |
| If you are new to conducting P&DR or need some additional information, please take a look at the following resources:<https://www.ed.ac.uk/human-resources/learning-development/annual-review> |  |
| Check when your reviewee last had their P&DR. Ensure you arrange this year’s P&DR within a 12 month period. |  |
| Remind reviewee about the process and make them aware of resources available: <https://www.ed.ac.uk/human-resources/learning-development/annual-review/support-and-resources/video-library> |  |
| Book adequate time for the meeting; **at least one hour**. |  |
| Book a suitable room for the meeting. This should be a **private** not a public space e.g. NOT staff restaurants / catering outlets. |  |
| Send reviewee a copy of the P&DR form available at <https://www.ed.ac.uk/human-resources/about/in-colleges/medicine-vet-medicine/p-and-d-r>If reviewee had objectives last year send a copy of last year’s completed P&DR form for reference. |  |
| Ask reviewee to complete S**ections 1, 2 & 3** of the form and to return it to you at least 7 days prior to review.**Section 5** should also be completed where the reviewee is involved in any undergraduate or postgraduate teaching.  |  |
| Read through reviewee’s self-review and supporting documentation and note down points to discuss at the meeting. |  |
| If appropriate, seek feedback about reviewee from other sources, e.g. another manager who has worked closely with reviewee. |  |

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| **The Meeting** |
| Make sure your phone is switched off and the meeting will not be disturbed. |  |
| Check that all **Mandatory Training** (including Managing Your Research Teams for managers of staff on grade UE08 and above) has been completed. If not, completion must be included as an objective. |  |
| Make your reviewee feel at ease. Start the discussion by asking them to reflect generally on the last 12 months.With the reviewee, reflect on their contribution, progress and development over the past 12 months referring to the self-assessment (**Section 3**) of the form. Acknowledge any challenges or difficulties that have hindered progress. Acknowledge any accomplishments outside the objectives previously set.Raise any disappointments or difficulties with tact and sensitivity. Do not raise performance issues for the first time in a P&DR. |  |
| Discuss **Section 4** where the Reviewee is in a management/leadership role. |  |
| Refer to **Section 5** re. teaching if applicable. |  |
| Note that **Sections 6 & 7** will predominantly be relevant for academics. |  |
| Re. **Impact and Engagement Activities** (**Section 6**), impact is considered to be an effect, change or benefit to the economy, society, culture, public policy or services, health, the environment or quality of life beyond academia. Within CMVM, it is categorised as an effect on: 1. Practice and practitioners; 2. Policy; 3. Commercialisation and translation; 4. public, patient and community engagement; 5. Education. |  |
| It should be noted that **Citizenship** (**Section 7**) is a criteria included in the Academic Promotions Policy. Citizenship refers to contributions to your School, College and/or the University, for example through membership of committees, participating in collegial projects or by leading an area of activity. It may also include professional activities outside the University. It is expected that your contribution will support the University’s commitment to equality, diversity and inclusion. |  |
| Agree **Objectives** for the coming year (**Section 8**). Be realistic. If the reviewee works part time they may have fewer objectives than a full timer. If an objective is time intensive consider how many other objectives should be set. |  |
| Discuss **Career Aspirations** (**Section 9**). Allow reviewee opportunity to talk about career goals or future plans. Consider how you might be able to support them. You might discuss promotion, secondment, flexible working etc. Do not make formal agreements in the P&DR; other processes and policies support sabbatical, flexible working etc.  |  |
| Ask your reviewee if there is anything else they would like to talk about before you close the meeting. **Thank your reviewee for their contribution!** |  |

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| **Post meeting**  |
| You need to complete **Sections 4, 6, 7, 8 and 9** of the form (as applicable) based on the P&DR discussion. Ensure the objectives written are meaningful, clear and achievable. |  |
| Complete **Section 10 Overall Summary** section. Make sure you reflect the P&DR discussion and don’t introduce new elements. Try to make this section positive. |  |
| Pass the form to your reviewee and ask them to review your comments and complete their portion of **Section 10**. They should then sign and return the form not you. |  |
| Pass the form to the agreed manager for final signature (on the first page). |  |
| Once the form has full signatures ensure it is held confidentially by the appropriate person e.g. Centre Manager and retained on your HR file.  |  |
| Completion of the annual review should then be recorded by the reviewee in People and Money, following the guidance [available](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides) at: [People and Money user guides | The University of Edinburgh](https://www.ed.ac.uk/staff/services-support/hr-and-finance/people-and-money-system/people-and-money-user-guides). Line managers are also able to record this on the reviewee’s behalf. |  |