

PDR (Performance & Development Review)

The PDR Meeting

A PDR can be many different things to different people. Amongst other things it should be

- A review of a person’s **work performance**, both against the requirements of their role as set out in the Role Profile and against objectives or goals as agreed at the last review (the ‘**What**’ of their role)
- A review of their knowledge, skills and behaviours – their **capability** – using, as a yardstick, the behavioural indicators, or statements, in their Capability Framework (the ‘**How**’ of their role)
- An agreement on **objectives** for the coming year
- An assessment of the **development** a person needs to achieve new objectives and perform even better in their current role, as well as development to progress to a bigger role if the person has the desire and potential to do so.
- An opportunity for the person to share career aspirations and give feedback to their manager

So what’s the difference between a PDR meeting and a one-to-one meeting (OTOM)? Have a look at the summary below:

What	When	Why	How Long
PDR	Annually	<ul style="list-style-type: none"> • To look at performance over past year against objectives and generally • To looks at capability • To agree objectives for coming year • To plan development (PDP) • To discuss career aspirations • To feedback on management and team issues 	No definitive answer but probably between 1 & 2 hours
OTOM	Once per month	Mainly business focussed around specific objectives, figures, other KPIs. Give and summarise feedback given during month. Brief update on development.	Approximately ½ hour

Contents of a PDR

What should be included?

- A PDR is partly about a person’s past performance, but more about the future. A good balance would be 30% past, to help understand why the person is where they are today, and 70% future, to focus on where they want to, and realistically could, go in the future, and also how they might get there.
- The PDR should be about the person’s skills and abilities, potential and inclinations, hence why it tends to be annual or leading up to a significant career change – perhaps a first management position, or a department move.
- Annual objectives should be reviewed and fresh ones agreed.
- The output should include a Personal Development Plan (PDP)

What should not be included?

- There should be no surprises – if there are, it points to a lack of communication during the year.
- It is less about a person’s business daily or weekly performance, although this may set the context for some of the observations made.
- There will be two people present at the meeting, the reviewer (usually the line manager) and the reviewee. Both have a defined role to play at points before, during, and after the actual review meeting. There should not be other people present, and no interruptions to the meeting.

Preparing for a PDR

Approximately two weeks before the meeting, the participants should carry out the preparation listed below.

By the reviewer	By the reviewee
<ul style="list-style-type: none"> • Give notice of the time, date, and place of the meeting • Prepare a view of how the person has performed during the past year; both against specific objectives and generally • Prepare feedback on the overall picture and events • Consider various career options that might be suitable for the person • Prepare objectives for the future 	<ul style="list-style-type: none"> • Prepare and forward any necessary paperwork • Prepare an overall view of how you have performed during the past year • Summarise feedback and OTOMs you have had during the past year • Consider where you would like your career to go, with options if possible • Consider development needs and ways of fulfilling these; draw up an outline PDP • Think about feedback to manager on how the team works and how manager can get more out of you

During the meeting

Both parties should be open, honest, and straightforward with each other. The mood of the meeting should be positive and non-threatening – the idea is to help the reviewee reach a desired goal, if that is possible, or if not, to be realistic about it in an assertive but not demeaning manner.

PDRs will also involve defining or setting large-scale objectives for the following year; and this will be achieved more successfully if the reviewee is allowed to take part in the objective setting process. The objectives should be formatted to be SMART, which in turn will help when reviewing these next year. Some objectives may last for a few weeks or months, with replacement objectives being agreed at appropriate OTOMs.

Although the business context will serve to provide examples of where the reviewee has performed well or less well, remember this is about the person being reviewed.

Both parties should concentrate mainly on personal qualities; 'I have difficulty getting some colleagues to accept my position' or 'You would benefit by being more assertive'.

Although it's wise for both parties to prepare their thoughts before the meeting, the overriding principle is that any statements made about the person should be agreed and recorded during the meeting, not prepared and scripted in advance.

If there is disagreement about, for example, a performance or capability rating, then both parties have a responsibility to try to reach agreement. As much objective evidence as possible should be used to establish that agreement. This could include: the Role Profile, the Capability Framework, measurements of objectives, KPIs, EEC feedback from other colleagues and customers, OTOM records, etc. Ultimately the line manager has the final say in assessment of performance and capability and, whilst both parties are required to sign the PDR document, this does not necessarily signify that the reviewee agrees with everything that is written on it, rather that it is a true representation of the discussion.

Footnote: In practice it is often the reviewee who rates their performance and/or capability lower than the reviewer when disagreement occurs!

After the meeting

By the reviewer	By the reviewee
<ul style="list-style-type: none">• Follow up on requests made by the reviewee such as help with development, and make sure these happen• Continue to monitor progress• Prepare for OTOMs where progress towards achieving the objectives will be monitored	<ul style="list-style-type: none">• Explore further development needs and options that may have arisen in discussion• Finalise the PDP• Prepare for OTOMs where progress towards achieving the objectives will be monitored

Exceptions

The above has concentrated on an annual PDR. There may be occasions when it is useful to review more than once a year – for example at the end of a defined training or development programme, or where a person has recently moved into a new position.

For related topics see Top Tips:

- **Assessing**
- **Feedback**
- **Objectives – Writing**
- **One-to-One Meetings (OTOMs)**
- **Recording Your Learning**