



Performance Development Review (PDR)

Performance Development Review (PDR).....	2
Online PDR form.....	2
Objectives	3
Core Values	4
Team Plan.....	5
Performance Summary	6
Development Plan.....	7
Career Development Plan.....	8
Employee Comments.....	9
Manager Comments	9
PDR Meeting.....	10
Submit PDR	10
Update Objectives.....	11
Appendix 1: PDR Process.....	12

Performance Development Review (PDR)

All staff should have a formal performance development review annually with their manager, a six month progress review meeting and at least regular calendar monthly one-to-one meetings. These provide opportunities for managers and staff to work together to:

- assess work and performance
- review past performance
- set objectives and targets for the coming year
- measure outputs against the Council's Core Values
- discuss personal development needs and career aspirations
- and consider suitability for Navigate.

The annual **PDR** takes place between April and June and the six month review between November and December.

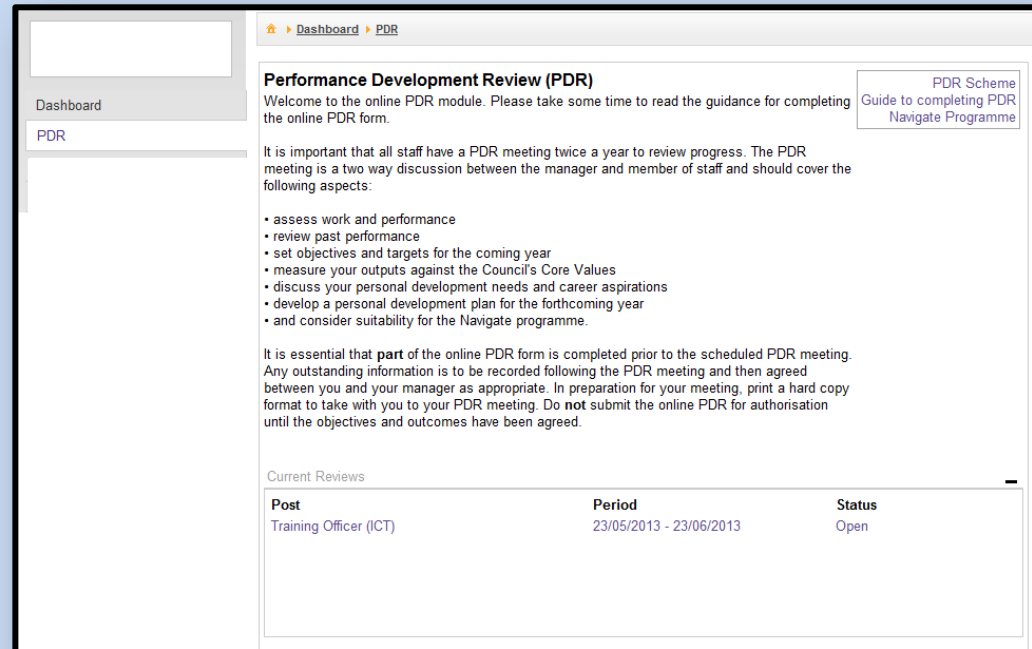
It is essential that **part** of the online PDR form (Objectives, Core Values, Team Plan and Performance Summary) is completed prior to the scheduled PDR meeting. Any outstanding information is to be recorded following the PDR meeting and then agreed between you and your manager as appropriate. In preparation for your meeting, print a hard copy format to take with you to your PDR meeting. Do **not** submit the online PDR for authorisation until the objectives and outcomes have been agreed.

Appendix 1 provides an overview of the PDR process.

Online PDR form

To complete the online PDR process, click **Open** for the current review period.

*Please Note: Some fields in the online process are not applicable for Tower Hamlets use.



Performance Development Review (PDR)

Welcome to the online PDR module. Please take some time to read the guidance for completing the online PDR form.

It is important that all staff have a PDR meeting twice a year to review progress. The PDR meeting is a two way discussion between the manager and member of staff and should cover the following aspects:

- assess work and performance
- review past performance
- set objectives and targets for the coming year
- measure your outputs against the Council's Core Values
- discuss your personal development needs and career aspirations
- develop a personal development plan for the forthcoming year
- and consider suitability for the Navigate programme.

It is essential that **part** of the online PDR form is completed prior to the scheduled PDR meeting. Any outstanding information is to be recorded following the PDR meeting and then agreed between you and your manager as appropriate. In preparation for your meeting, print a hard copy format to take with you to your PDR meeting. Do **not** submit the online PDR for authorisation until the objectives and outcomes have been agreed.

Current Reviews

Post	Period	Status
Training Officer (ICT)	23/05/2013 - 23/06/2013	Open

Objectives

(Complete prior to the PDR meeting)

Use the section to write your objectives for the coming year in line with your team plan. Your objectives must be **SMART** - Specific, Measureable, Achievable, Realistic and within Timescales.

The new module does not have the facility to record performance against 2012/13 objectives. These will still need to be discussed during your PDR and outcomes must be recorded and held on file by both manager and employee.

Post Training Officer (ICT) Review Start Date 23/05/2013 Review End Date 23/06/2013

Previous * Objectives Next

Add New Help

Write your objectives for the coming year in line with your team plan. Identify at least 5 objectives for your current role.

Objectives must be **SMART** - Specific, Measureable, Achievable, Realistic and within Timescales.

Title

Description Max 2000 characters

Completed Date

Emp Status Date:

Employee Comments Max 2000 characters

Mgr Status Date:

Manager Comments Max 2000 characters

Carry Forward

Exit Save Changes

1. To enter an objective, click **Add New**
2. Enter the **Title** of an objective
3. Use the **Description** field to enter more details and what the measureable outputs will be
4. The **Employee Comments** and **Managers Comments** fields are to be completed as part of the final year review
5. Ensure the **Carry Forward** option is selected
6. Click **Add New** to enter another objective. You should identify at least 5 objectives for the current year
7. Scroll down to **Save Changes** and click **Next**.

Managers and employees will be able to review 2013/14 objectives at the six month review and the next annual PDR.

Core Values

(Complete prior to the PDR meeting)

The Core Values provide staff with a clear set of standards and behaviours required to deliver quality services. Use this section to demonstrate the behaviours that underpin the core values.

In the **Evidence Notes** of each area describe how you -

Achieve Results by:

- securing ambitious outcomes that make a difference to customers
- using resources well and achieving value for money
- taking responsibility and being accountable
- being flexible and responding positively to change.

Value Diversity by:

- demonstrating commitment to equalities and diversity
- actively challenging discrimination
- planning for and responding to the needs of our communities
- being inclusive and valuing others contributions.

Learn Effectively by:

- taking personal responsibility for learning
- learning from successes and mistakes
- learning from others
- sharing learning and experiences.

Engage with Others by:

- showing respect
- creating opportunities for involvement
- influencing others
- communicating well
- building relationships and partnerships.

The screenshot shows a web application interface for a Performance Development Review (PDR). The user is logged in as a 'Post Training Officer (ICT)'. The review period is from 'Review Start Date 23/05/2013' to 'Review End Date 23/06/2013'. The current section is 'Core Values', with 'Previous' and 'Next' navigation buttons. A 'Help' button is also present. The main content area contains the following text: 'The Core Values provide staff with a clear set of standards and behaviours required to deliver quality services. In the Evidence Notes of each area describe how you demonstrate the behaviours that underpin the core values.' Below this is a note: 'Please note: Rating boxes are non-applicable to TH staff.' There are two sections for 'Achieving Results' and 'Valuing Diversity'. Each section includes a 'Title', a 'Description' with bullet points, 'Mid Year Rating' and 'End Year Rating' dropdown menus with 'Date' fields, and an 'Evidence Notes' text area with up and down arrows.

Title	Description	Mid Year Rating	End Year Rating	Evidence Notes
Achieving Results	<ul style="list-style-type: none">• Securing ambitious outcomes that make a difference to customers• Using resources well and achieving value for money• Taking responsibility and being accountable• Being flexible and responding positively to change	<input type="text"/> Date:	<input type="text"/> Date:	<input type="text"/>
Valuing Diversity	<ul style="list-style-type: none">• Demonstrating commitment to equalities and diversity• Actively challenging discrimination• Planning for and responding to the needs of our communities• Being inclusive and valuing others contributions	<input type="text"/> Date:	<input type="text"/> Date:	<input type="text"/>

If you are a manager, social worker, occupational therapist or a teacher, you will also be required to complete the additional values associated with your job role. Once you've evidenced on how you meet the demonstrated behaviours against each of the council's core values click **Save Changes** and **Next**.

Team Plan

(Complete prior to the PDR meeting)

Use the **Team Plan** section to evidence how your role contributes to the achievement of your team plan.

1. Ensure **EMP Team Plan** is selected
2. Use the **Evidence Notes** field to describe how your roles contributes to the achievement of your team plan
3. Click **Save Changes** and **Next**.

The screenshot shows a web interface for a performance review. At the top, it displays 'Post Training Officer (ICT)', 'Review Start Date 23/05/2013', and 'Review End Date 23/06/2013'. Below this is a navigation bar with 'Previous', 'Team Plan', and 'Next' buttons. There are also 'Add New' and 'Help' buttons. The main content area contains the text: 'Evidence how your role contributes to the achievement of the team plan.' followed by two blue italicized instructions: 'Ensure EMP TEAM PLAN is selected.' and 'Please note: Rating fields are non-applicable to TH staff.' Below these are three rows of form fields: 'NOS ID' with a dropdown menu showing 'EMP TEAM PLAN', 'Mid Year Rating' with a dropdown and 'Date:' label, and 'End Year Rating' with a dropdown and 'Date:' label. At the bottom is a large 'Evidence Notes' text area with up and down arrows. At the very bottom right are 'Exit' and 'Save Changes' buttons.

Performance Summary

(Complete prior to the PDR meeting)

The Performance Summary section is to be used to help you evaluate your personal performance in the past 12 months including any strength and development areas.

1. Enter your evaluation in the employee **Notes** field. If you would like to be considered for the **Navigate** initiative, you will need to discuss this with your line manager during the PDR meeting.
2. Click **Save Changes**

3. The manager **Notes** field will be used to comment on your performance by your manager
4. Following your PDR meeting, your manager will confirm your suitability on the **Navigate** programme using the **Select for Navigate** field
5. Click **Next**.

Post Training Officer (ICT) Review Start Date 23/05/2013 Review End Date 23/06/2013

Previous **Performance Summary** Next Help

Evaluate your personal performance in the past 12 months including any strength and development areas.

If you would like to be considered for the Navigate initiative, you will need to discuss this with your line manager during the PDR meeting.

Please note: EMP Status and Date fields are non-applicable to TH staff.

Emp Status

Date

Notes Max 2000 characters

Mgr Status

Date

Manager

Notes Max 2000 characters

Select for Navigate

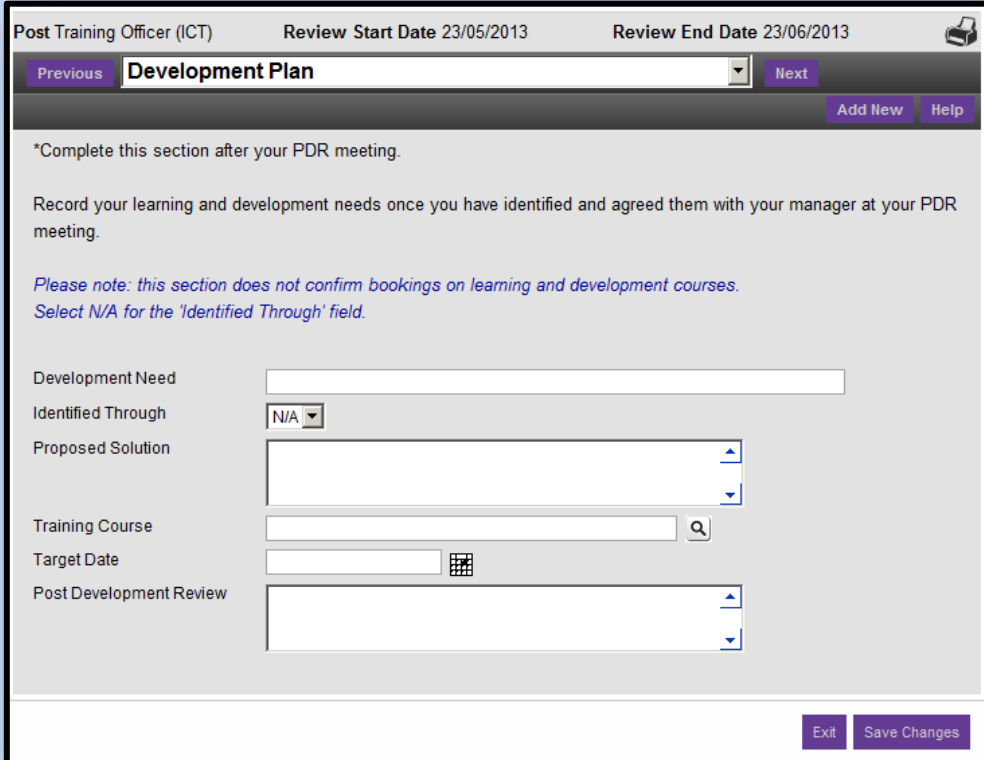
Exit Save Changes

Development Plan

(Complete after the PDR meeting)

The Development Plan is used to record your learning and development needs once you have identified and agreed them with your manager at your PDR meeting. Please note: this does not confirm bookings on learning and development courses.

1. To specify them, click **Add New**
2. Enter the learning and development need in the **Development Need** field
3. Propose a solution on how to meet the need for example on the job training, mentoring, coaching, work-shadowing or applying for a secondment in the **Proposed Solution** field
4. Select  a learning and development course from the Corporate Learning and Development Programme
5. Enter the **Target Date** for completion
6. The **Post Development Review** field is to be used on completion of the identified learning and development need to evaluate the impact the learning has had on your performance.



Post Training Officer (ICT) Review Start Date 23/05/2013 Review End Date 23/06/2013

Previous **Development Plan** Next

Add New Help

*Complete this section after your PDR meeting.


Record your learning and development needs once you have identified and agreed them with your manager at your PDR meeting.


Please note: this section does not confirm bookings on learning and development courses. Select N/A for the 'Identified Through' field.

Development Need

Identified Through

Proposed Solution

Training Course 

Target Date 

Post Development Review

Exit Save Changes

Click **Add New** to enter additional development needs.

Click **Save Changes** and **Next**.

Career Development Plan

(Complete after the PDR meeting)

Following your PDR meeting, use this section to record the outcomes relating to your career development and identify what steps you may need to action to achieve this.

1. Identify your career aspirations within the **Preparatory Steps** field
2. Identify the route you will need to take to attain your aspirations for example on the job training, mentoring, coaching and work-shadowing or applying for a secondment in the **Proposed Solutions** field
3. Enter the steps you have identified to progress in the **Steps Taken** field
4. Update the **Status** accordingly.

The screenshot shows a web application interface for a 'Post Training Officer (ICT)'. The page title is 'Career Development Plan'. The review period is from 23/05/2013 to 23/06/2013. The form contains the following fields and instructions:

- Role Aspired For:** A dropdown menu.
- Preparatory Steps:** A text input field with up and down arrow icons on the right.
- Proposed Solutions:** A text input field with up and down arrow icons on the right.
- Steps Taken:** A text input field with up and down arrow icons on the right.
- Status:** A dropdown menu.

Instructions on the page include: '*Complete this section after your PDR meeting.', 'Record the outcomes relating to your career development and identify what steps you may need to action to achieve this.', and 'Please note: 'Role Aspired For' and the 'Statue' fields are non-applicable to TH staff.'

Navigation buttons include 'Previous', 'Next', 'Help', 'Exit', and 'Save Changes'.

Employee Comments *(Complete after the PDR meeting)*

Use this section to enter any additional comments or highlight any issues you have discussed during your PDR meeting. If you do not agree with your PDR content and outcomes, please record areas of disagreement and how this will be managed within this section.

Click **Save Changes** and **Next**.

Manager Comments

This section is used by managers only to enter any additional comments or highlight any issues. Click **Next**.

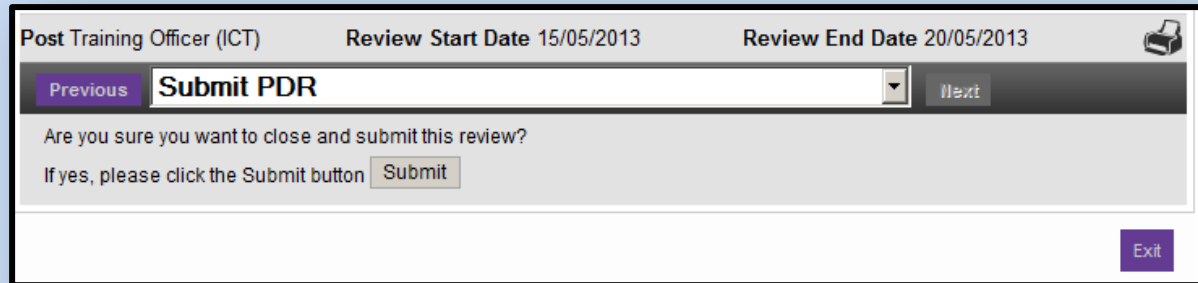
The screenshot shows a web interface for a Performance Development Review (PDR). At the top, it displays 'Post Training Officer (ICT)', 'Review Start Date 23/05/2013', and 'Review End Date 23/06/2013'. Below this is a navigation bar with 'Previous', 'Employee Comments', and 'Next' buttons, along with a 'Help' button. The main content area contains the instruction: '*Complete this section after your PDR meeting. Enter any additional comments or highlight any issues you have discussed during your PDR meeting. If you do not agree with your PDR content and outcomes, please record areas of disagreement and how this will be managed.' Below the text is a text input field labeled 'Employee Comments' with a 'Max 2000 characters' limit. At the bottom, there are 'Exit' and 'Save Changes' buttons.

The screenshot shows a web interface for a Performance Development Review (PDR). At the top, it displays 'Post Training Officer (ICT)', 'Review Start Date 23/05/2013', and 'Review End Date 23/06/2013'. Below this is a navigation bar with 'Previous', 'Manager Comments', and 'Next' buttons, along with a 'Help' button. The main content area contains the instruction: 'This section is used by managers only to enter any additional comments or highlight any issues. This should reflect the discussion held during the PDR meeting.' Below the text is a text input field labeled 'Manager Comments' with a 'Max 2000 characters' limit. At the bottom, there is an 'Exit' button.

PDR Meeting

Remember, the online PDR form must be completed for the actual PDR meeting to discuss the details with your manager. In preparation for your meeting click the **Printer** icon to view the full online review and click **Print** for a hard copy format to take with you to your PDR meeting.

At this stage, please do not submit the online PDR form. Click **Exit**.



The screenshot shows a web interface for a Performance Development Review (PDR). At the top, it displays 'Post Training Officer (ICT)', 'Review Start Date 15/05/2013', and 'Review End Date 20/05/2013'. There is a printer icon in the top right corner. Below this is a navigation bar with 'Previous', 'Submit PDR', and 'Next' buttons. The main content area contains the text: 'Are you sure you want to close and submit this review?' followed by 'If yes, please click the Submit button' and a 'Submit' button. An 'Exit' button is located in the bottom right corner of the form area.

Submit PDR

(After the PDR meeting)

Once you've completed your PDR meeting with your manager and the objectives and outcomes have been agreed, return to the online form, make any changes if necessary and **submit** the online PDR for authorisation. An approval request email notification will be sent to your manager. Your manager will be required to complete their sections of the online PDR form. It is the responsibility of your manager to agree statements to be made with you at your PDR meeting. You can review them online following the final authorisation.

Update Objectives

Your monthly one-to-one meetings are an opportunity to track the progress of your PDR objectives. You'll be able to update the status of your objectives at your next review.

1. Click to **Open** the new online PDR

Current Reviews		
Post	Period	Status
Training Officer (ICT)	18/06/2013 - 18/07/2013	Open

Past reviews		
Post	Period	Status
Training Officer (ICT)	15/05/2013 - 20/05/2013	Authorised

Back

2. To update an objective as complete, change the **Emp Status** to **Complete** and use the **Employee Comments** field to provide a brief explanation on the completion. Ensure the **Carry Forward** option is deselected.
3. If an objective has not been met, use the **Emp Status** field to set the objective to either **Not Started**, **Partial** or **To be Actioned** as appropriate and use the **Employee Comments** field to provide a brief explanation. Select the **Carry Forward** option.

Update all objectives and click **Save Changes**.

Post Training Officer (ICT) Review Start Date 23/05/2013 Review End Date 23/06/2013

Previous * Objectives Next Add New Help

Write your objectives for the coming year in line with your team plan. Identify at least 5 objectives for your current role.

Objectives must be **SMART** - Specific, Measureable, Achievable, Realistic and within Timescales.

Title:

Description: Max 2000 characters

Completed Date:

Emp Status: Date:

Employee Comments: Max 2000 characters

Mgr Status: Date:

Manager Comments: Max 2000 characters

Carry Forward:

Exit Save Changes

Appendix 1: PDR Process

