

Performance Development Review

Staff Handbook

Contents

1. Introduction
2. Aim of the PDR
3. What do I need to do?
4. How do I prepare for my PDR?
5. How do I set and agree my objectives?
6. What are personal development needs?
7. What are West Sussex behaviours?
8. How do I review my performance using evidence and feedback
9. What is a PDR Rating?
10. Final hints and tips
11. Learning & Development



1. Introduction

The PDR staff handbook is intended to be used in conjunction with the PDR learning pathway on the Learning & Development gateway. This handbook provides hints and tips and pointers, reminding staff of the importance of having an efficient and effective PDR discussion.

Not all information regarding PDR's is contained in this handbook however reference is made to other documents if you wish to extend your learning.

2. What's in it for me?

Your PDR is a key element of your performance at work.

It helps you identify clear objectives to support the delivery of your team, business unit and the Future West Sussex vision.

It helps you to:

- Focus your work activity,
- Spend quality time with your manager, discussing your needs and aspirations,
- Recognise and celebrate your achievements,
- Ask for support in working towards your objectives and
- Find ways to progress your personal development needs.

The PDR process applies to all WSCC staff with the exception of those based in Schools, and staff on Teachers terms and conditions, where separate arrangements apply.

Where local performance management arrangements exist to meet specific statutory or professional requirements performance management should continue to operate to these agreed processes, incorporating where relevant additional elements from the PDR process.

3. What do I need to do?

Your PDR responsibilities include:

- Actively prepare for each PDR conversation.
- Review previous years PDR.
- Draft your objectives for the new performance cycle.
- Identify areas of achievement and recognition.
- Identify areas for improvement and potential development.
- Gather evidence and feedback on your performance from peers, colleagues and those you have worked closely with on particular tasks/projects.
- Actively listen and engage in the PDR conversation.
- At the mid-year and year-end discuss propose a self-rating.
- Agree next steps and regular catch ups/one to ones.



4. How to I prepare for my PDR?

When preparing your PDR conversations consider reviewing and recording your performance throughout the year so that you don't forget your achievements or areas for improvement on the day of the PDR conversations.

The following questions will help you to reflect on your performance and give you some structure to the conversation.

- **What went well?**
Reflect on your achievements, what was good about the work you did, were there particular aspects you were really pleased with. What feedback did you get? How well received was the work when you completed it? How did you feel?
- **What went less well?**
Although you may have delivered an outcome, it may not have gone as well as you anticipated. Why was this? What happened? Were there particular incidents or behaviours that prevented you from achieving an excellent outcome?
- **Lessons learnt?**
Reflect on what you learnt from achieving your outcome? Consider how you used your skills, knowledge and behaviours.
- **What would I do differently next time?**
If you could 'start from scratch' what would you do differently? What have you learnt that would make you do things differently and why?



The questions above look simple enough but once you start thinking about them you can really start to 'gather a picture' of your performance and have a full and frank conversation with your manager.

Reflect on both the tasks you are involved in and the positive behaviours you acquired as well as those you can improve on.

A good way of evaluating your behaviour is to review the West Sussex behaviours and ask yourself:

"Which ones do I recognise in myself...good and bad?"

"What examples can I give where I have demonstrated this particular behaviour?"

What behaviours will I need to demonstrate to achieve this objective?"

The WS behaviours state I should build trust with customers and work with them to find the best solutions. What examples can I provide where I have done this well/less well?"

“What behaviours can I improve on and how?”

It is important to be honest with yourself and look at both those behaviours you excel at and those where you may require further development.

Being honest and transparent reduces the risk of you being surprised by a challenge during your PDR discussion.

Self-assessment gives you an opportunity **before** your conversation to think of a solution or development opportunity that may help improve the behaviour/s you demonstrate less well. This shows initiative, engagement and forward thinking.



5. How do I set & agree my objectives?

When drafting your objectives consider the SMART acronym.

Specific – what do you want to achieve

Measurable – How are you going to measure if you have achieved it? They can be performance or date driven (number of, profit of, %age reduction in, approved by, written by)

Achievable – do you think you can achieve the objective and its outcome successfully?

Resources - What resources might you need to achieve the outcome (the right equipment, the right people, the right budget?)

Time bound – What is the 'delivery' date. These can be long or short term.

A good tip is to use 'action' verbs when considering an objective. For example:

Improve	Demonstrate	Administer
Reduce	Complete	Compare
Implement	Regulate	Show
Publish	Set	Remove
Design	Train	Align
Develop	Publish	Determine
Maintain	Identify	Organise

Your PDR is a work in progress.

You are not expected to have a finite objective written down and perfected by the time of the PDR discussion.

You and your manager will work through the objectives together and both of you will come to agreement.



Objectives will undoubtedly change over time due to unforeseen activities and there is ample opportunity to revise and review them throughout the year.

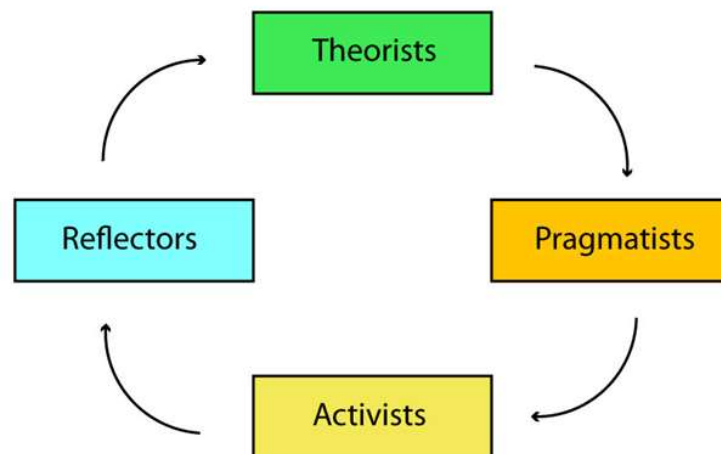
6. What are personal development needs?

Personal development needs are areas of work, including skills, knowledge or behaviours that you need to learn to be able to achieve your objectives. You may not know what personal development you will need when drafting your objectives as these may only become apparent when you are actively engaged in your work and you encounter a particular issue that you may need assistance with. This development could be in the form of a new skill, a particular piece of knowledge you do not have or a behaviour that does not come naturally to you.

There are many ways in which you can acquire new learning. These include;

- Classroom based courses
- On-line learning
- Reading material
- Mentoring
- Coaching
- Work shadowing
- Speaking with individuals who have expert knowledge on particular issues

We all learn differently and you will have the opportunity to discuss the best learning intervention for you with your manager. Why not try the **learning style questionnaire** that can be found on the PDR learning pathway on the learning & development gateway.



Personal Development Plans

A personal development plan (PDP) is just another name for an action plan, only this one refers specifically to your aspirations regarding your personal development. A PDP allows you to set your own personal targets and find the best way to achieve them. Further information of personal development planning can be found on the PDR learning pathway on the learning & development gateway.

7. What are West Sussex Behaviours?

The West Sussex behaviours are an essential part of the PDR conversation. It is not just **what** you are doing but also **how** you are doing it. The behaviours apply to all WSCC employees and there is an expectation that they are demonstrated in a positive way.

It is useful, prior to your PDR conversations to look through each of them and rate yourself accordingly. Think of examples of where you may have excelled at a particular behaviour and other times when you have not demonstrated the positive behaviour as required.

A full description of the West Sussex behaviours can be found on the staff intranet – The Point.

8. How do I review my performance using evidence and feedback?

As well as taking responsibility for gathering your own feedback, your manager will ask you to request feedback from those you work closely with. Feedback can help to evidence a particular piece of work you have done really well and can also highlight areas for improvement.

There is a PDR feedback form you can use. Alternatively you can send an email requesting feedback on a particular subject or piece of work.

When asking for feedback:

- Be clear on why you are asking for it.
- Be precise – what do you want them to feedback on (a particular skill, knowledge or behaviour)
- Encourage the individual to offer positive and less positive feedback. Ask for evidence or examples.



Once you have received the feedback:

- Reflect on what has been written or said.
- Don't feel you have to agree with it...however be honest with yourself.
- Think forward and identify the solution. Our own behaviour is the only thing we can control. It is important to think about what 'you' can do to improve a situation.

9. What is a PDR rating?

Before your mid-year and year-end review you will be asked to rate your own performance. The ratings are shown below.

1 Unacceptable Performance	Failed to meet key objectives and demonstrated negative behaviours. Overall performance is significantly below required standard.
2 Some improvement required in performance	Met only some of the objectives (or partially achieved against objectives) and demonstrated some positive behaviours. Overall performance does not meet the required standard.
3 Good performance	Met all objectives and consistently demonstrated positive behaviours. Overall performance is good.
4 Strong Performance	Met all and exceeded most objectives and frequently role modelled positive behaviours. Overall performance is strong.
5 Exceptional Performance	Exceeded all objectives and delivered significant additional work tasks. Consistently role modelled positive behaviours. Overall performance is exceptional.

Whilst preparing for these meetings give some thought to the rating you would give yourself. This does not have to be an exact science but base your self-rating on:

- Delivery of your objectives and the measures you put in place for a successful outcome.
- The way in which you have demonstrated the behaviours.
- Lessons learnt and achievement of your development needs.
- Evidence and feedback you have gathered during the delivery of your objectives.
- Additional duties you have taken on over and above your objectives and daily work activities.

Your manager may propose a different rating and the PDR conversation will be an opportunity for you to discuss this.

The end-year review will establish your overall rating and will go through a consistency rating process to ensure the rating is fair and balanced.

If you do not agree with your overall rating you will need to speak with your line manager and express your reasons for your disagreement.

10. Final hints and tips

Here are some final hints and tips to help you 'own' your PDR and ensure you make the most of your PDR conversation.

- Communicate effectively
- Listen actively
- Remain objective and open to ideas
- Think solution not problem
- Ask questions
- Challenge assumptions
- Offer feedback
- Take notes
- Keep focused - the PDR is about you and not your manager or other colleagues.
- Share your ideas and aspirations
- Communicate your own target
- Be honest about your performance and behaviours
- Agree next steps



There are plenty of information guides and additional learning opportunities on the **PDR learning pathway** to help you make the most of your Performance Development Review.

11. PDR Learning & Development

A PDR learning pathway has been set up on the WSCC Learning & Development Gateway to assist you with additional opportunities to develop your PDR skills, knowledge and behaviours.

Various topics include:

Questioning & listening skills
Setting Objectives
Expressing yourself
Active body language
Giving & receiving feedback
Communication skills
Planning your own development
Learning styles questionnaire
Assertiveness skills and techniques



The difference between performance and excellent performance often comes down to not what you do but how you do it.

Anon