



# **Performance Development Review Process & Guiding Principles 2025-2026**

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## 1. Introduction

Performance and Development Review (PDR) is a University wide process to support staff in maximising their career and professional development through meaningful conversations. The PDR process allows contributions to be documented, reviewed and aligned with the high-performance culture which is instrumental to the achievement of the University's strategic ambitions. PDR is a joint process, with the line manager/reviewer supporting and guiding staff to define and attain their objectives, as well as to progress towards appropriate professional and career development ambitions. Whilst PDR can inform other processes where relevant, e.g., Academic Promotion, it is widely recognised that a meaningful PDR discussion is of significance and value to every colleague and their respective line manager.

## 2. Annual Cycle 2025-2026

| Staff Group        | PDR Cycle                  | Performance Review & Objective Setting |
|--------------------|----------------------------|----------------------------------------|
| All Eligible Staff | 1 July 2025 – 30 June 2026 | 16 July – 30 September 2026            |

## 3. The Process

### 3.1 Roles and Responsibilities

The Principal, VP/Heads of College and the Chief Operating Officer have ultimate responsibility for ensuring compliance with the University's PDR Process & Guiding Principles. This includes setting strategic objectives aligned with university strategy, determining the standards required, and identifying/agreeing associated career and personal developmental plans. Further, they are each responsible for ensuring that line managers/reviewers are fully aware and apply a consistent approach across the University.

Prior to the commencement of the PDR cycle, it will be the responsibility of the Principal, VP/Heads of College, and the Chief Operating Officer – in discussion with Heads of Units and the local Heads of People & OD – to produce a clear hierarchy of reviewers/reviewees. It is understood that this hierarchy may require modification as the cycle progresses, and colleagues may leave or join.

### 3.2. Management, Preparation and Oversight

VP/Heads of College and the Chief Operating Officer for University Services are responsible for the integrity of the process and ensuring that a robust and consistent approach is taken. In advance of the PDR round, each VP/Head of College and the Chief Operating Officer will outline their expectations regarding delivery of the strategic aims of their respective business units.

Reviewers should have discussions with their line managers on determining unitary and university priorities to be reflected in individual/team objectives in advance of the annual PDR exercise. It is essential for each reviewer to engage in discussion with their respective line manager on career development and a review of objectives if set/proposed. Line managers are ultimately responsible for ensuring that reviews take place. Implementation will occur through the agreed PDR hierarchy, which will ideally, reflect the line management structure at Unit level. Units should work to ensure that: there are enough trained and competent reviewers

to conduct a sufficient number of reviews to ensure consistency, whilst maintaining a manageable load. Ideally, each reviewer should conduct no more than 12 reviews. Where not acting as reviewers, line managers are responsible for ensuring that nominated reviewers have access to relevant information to carry out the review.

### 3.3 Alignment of Objectives

To ensure the activity of individual staff is aligned to the needs of the University, it is vital that the University defines and communicates its plans appropriately. The University has defined its priorities in [World Changing Glasgow: University for the World](#) supported by College, School and Service strategic implementation plans. This strategy is the key reference point for senior managers in determining School or Service plans and to help establish the desired outcomes required by each area to ensure delivery of these objectives.

The development and communication of these local plans is instrumental to the successful application of the PDR process; translating our high-level strategic objectives into deliverables that are operationally relevant and enable colleagues to understand their potential contribution to the overall purpose of the University. The creation of these local plans will typically include information relating to colleagues and the associated skills and behaviours required to ensure these plans are achievable. [The Glasgow Professional Behavioural Framework](#) serves as a useful tool in determining requirements for professional services and academic areas. It is the role of managers and reviewers to ensure that translation from strategic aims to shorter-term tangible deliverables and milestones are effectively communicated, in order that individual performance, career development plans and objectives are relevant, appropriate and aligned with University ambitions.

### 3.4 Measurement and Performance Monitoring

To support the delivery of the University Strategy, the University uses Planning Dashboards which incorporate College/School/Service Key Performance Indicators (KPIs). This tool enables the University to monitor progress at a strategic level and identify areas of concern. These dashboards also provide a strategic focus for senior managers to cascade information on the development of School/Service plans to provide both clarity and focus.

It is anticipated that CMGs/PSG will develop supporting operational information and systems that enable proactive management of day-to-day activities as well as providing key performance indicators to monitor progress against the desired strategic outcomes.

For Colleges/Schools this may include:

- Undergraduate satisfaction (NSS)
- Assessment and feedback (NSS)
- International FTE
- PGR: Staff Ratio
- Research output quality
- Research income per staff FTE
- Entry tariff

Sound business and management information is a vital component in informing the focus of performance management discussions to enable a tangible review and assessment of performance, aligned with the delivery of objectives.

### 3.5 Job Families, Role Profiles and Job Descriptions

A critical component of the University's PDR Framework is to ensure that reviews are completed with reference to the appropriate [Job Family Role Profile](#) and job description of each staff member. The former provides an outline of the expectations of the role whilst the job description articulates the duties for which the staff member is responsible. The PDR is also an ideal time to review the Job Description for accuracy. Where significant changes are identified, a separate follow-up discussion should be arranged with local P&OD to take this forward.

The job family structure provides a clear and concise indication of general expectations at each grade level and facilitates a consistent and transparent approach to:

- Job grading
- Performance management and development
- Review and evaluation
- Personal and career planning, development and progression

Role profiles and job descriptions, coupled with the cascading of University objectives, enable objectives/performance standards and development plans to be agreed at an individual and team level, and offer clarity to both line managers and role holders as to expectations relating to ownership of accountabilities and key areas of responsibility.

## 4. Inclusions and Exemptions

The following groups of staff are fully exempt from the PDR process:

- Those on an NHS clinical academic pay scale. They may, however, be required to complete reviews in their capacity as line manager
- Those who are on a contract of less than 0.2FTE (7 hours) per week
- Staff who started from 1 July 2026.

The following staff are required to set objectives only:

- Staff who started between 1 January 2026 and 30 June 2026
- Staff who increased their hours to greater than 0.2FTE (7 hours) per week after 1 January 2026.

### 4.1 Absence

Where there has been a significant period of absence within the PDR year, i.e., long-term sick leave, maternity/adoption/shared parental leave etc., such staff may be exempt from participating in the PDR process, with exemptions to be agreed by the [local People & OD Team](#). If exempt, objectives and development plans should be refreshed and updated on the staff member's return to work to enable future engagement in the process.

### 4.2 Resignation

Where a staff member is due to leave the University during the window when PDR discussions are scheduled to take place, there is no requirement for a formal PDR, however, regular informal review meetings should take place between the line manager and the staff member in accordance with operational needs.

Please raise an enquiry on the [People & OD Helpdesk](#) should you have any queries regarding staff who may be exempt from the process.

## 5. The Review Meeting

The PDR meeting is a face-to-face, two-way discussion between a staff member and their reviewer. The review discussion will essentially focus upon several aspects:

- personal development activities undertaken in the past year
- identification of career development plans for the forthcoming year
- objective setting/performance standards for the forthcoming year
- review of the past year, with reference to any relevant documentation or evidence of achievements and feedback from others
- assessment against the University Values and Glasgow Professional Behavioural Framework
- review of performance during the review period, in relation to duties, responsibilities, accountabilities, achievement of objectives/performance standards
- areas of excellence including contribution to team performance
- areas of performance that could be improved
- factors that influenced performance
- [wellbeing](#): exploration of general wellbeing, and how work has impacted/been impacted by wellbeing throughout the year
- future career intentions, including desire and readiness for promotion regardless of career stage
- where appropriate, progress within the Early Career Development Programme (ECDP).

Objective deadlines should be set in the context of local strategic requirements and therefore may be established during the review period to extend beyond its scope.

The review process should flag individual staff and organisational needs to the reviewer, and if appropriate onwards to the line manager (where different) such as workload distribution, job satisfaction, opportunity for challenge, growth, behavioural competencies and skill enhancement.

The formal review meeting provides the ideal forum for discussion of future career development plans, long term aspirations, or potential retirement, where relevant. Where a staff member indicates they are considering retirement, more detailed discussion can take place around future intentions. Further guidance can be found in the [University's Retirement Guidance](#).

## 6. The Development Plan

A key outcome of the review meeting for all staff should be a development plan aligned with the goals and objectives of the staff member and the University. It will consider existing knowledge and skills, the role and future development needs.

The plan may include:

- areas for development
- how the development will be achieved (e.g., support; workshops; on-the-job training; coaching; mentoring) and
- how progress will be monitored.

The following might be considered when preparing the plan:

- scope for development within current role

- general performance against objectives
- any requirements to enhance or improve behavioural competencies
- the ways in which development could improve performance.
- new skill interests or requirements
- potential ways to gain new knowledge
- short-term and long-term career ambitions and plans.

Although reviewees are primarily responsible for determining and progressing their own plan (aligned with University Strategy) and its implementation, reviewers should provide encouragement, guidance, and support with this process. Applied fairly and consistently the process should reflect Equality and Diversity policies, focusing on individual performance, based on merit alone, cognisant of all equality implications.

The University's [Athena Swan Action Plan](#) encourages staff to discuss a development plan with their Head of School/Line Manager/Reviewer or Head of Service to facilitate their future potential for promotion/career development. Women typically spend longer at the same grade before being promoted than men: this is particularly pronounced at the Grade 10 promotion point. In the case of staff performing strongly at Grade 9 who have been at this grade for more than seven years, reviewers are encouraged to explore with them in the context of their development objectives for the forthcoming year any actions, support or interventions that might initiate or further prepare an effective case for promotion in the future.

## **7. Early Career Development Programme (ECDP)**

It is advised that those reviewing ECDP colleagues make themselves familiar with the [Early Career Development Programme](#) and the [Academic Promotions](#) process and [Criteria](#), prior to carrying out the PDR review.

For ECDP participants, it is especially important that regular progress reviews and monitoring takes place to support individuals to achieve promotion within the ECDP timescales. The PDR is a key mechanism for reviewing participant progress, allowing participants the opportunity to reflect on their current performance and achievements. It also offers the opportunity to evaluate progress towards the reviewee's academic promotion criteria and individual timescales on the ECDP programme. Mindful of the need for work-life balance and employee wellbeing, the reviewer should provide guidance, advice and support to the participant, including in relation to relevant development opportunities, where appropriate. Through the ECDP Quality Assurance process, Heads of School should be aware of trends identified by the reviewer in order that ongoing line management support can be provided to programme participants.

Performance ratings are required for all ECDP participants and will be discussed during the review and recorded on the PDR form, as detailed in section 8.

## **8. Performance Outcome Assessments – Early Career Development Programme & University of Glasgow Singapore**

Performance ratings are only required for participants of the Early Career Development Programme (ECDP), and staff employed at University of Glasgow Singapore.

The full PDR process should be undertaken openly and transparently. Reviewers should make an informed decision on the overall performance assessment descriptor that most appropriately describes the level of performance.

Performance outcomes will be informed by general contribution, achievement of in-year objectives and overall performance in the post.

Reference to Job Description, Job Family role profiles, academic promotion criteria, and Russell Group Benchmark data should assist in informing the decision-making process regarding individual performance assessment outcomes. Furthermore, assessment against ECDP timescales, standards, and anticipated impact will be critical in making an accurate assessment.

The performance summary should be accompanied by a performance outcome assessment that is based on the following indicators and descriptions. The descriptors are critical in ensuring that PDR outcomes are applied in a fair and consistent fashion. Reviewers should ensure they fully discuss the rationale for the rating, during the PDR discussion.

|                                                                                                                                                                                                                                                                                                             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Exceptional Contribution</b>                                                                                                                                                                                                                                                                             |
| Consistently exceeds expectations relative to role/grade, as evidenced by delivery against objectives to an exceptional standard. In addition, the staff member may have significantly contributed to activities outside the normal scope of their role and/or successfully overcome particular challenges. |
| <b>Strong Contribution</b>                                                                                                                                                                                                                                                                                  |
| Overall performance in the role is strong, demonstrated through strong delivery of objectives and progress against development plans. Performance has been within the normal requirements of the role with some elements above expectations.                                                                |
| <b>Inconsistent Performance</b>                                                                                                                                                                                                                                                                             |
| Overall performance in the role is variable, and some key objectives may not have been delivered to the required standard. Expectations are met in some, but not all essential areas of responsibility and further development is required.                                                                 |
| <b>Improved Performance Required (IPR)</b>                                                                                                                                                                                                                                                                  |
| Performance is significantly below expectations of the role. Insufficient progress has been made towards the achievement of objectives and standards and demonstrates areas of repeated inconsistent performance or where significant improvement and/or personal development is required.                  |

It is anticipated that the 'Strong Contribution' outcome will be applicable to a large proportion of eligible staff groups. At all outcome levels it is expected that the reviewer, through quality dialogue with each reviewee, will provide sound and constructive feedback relating to progress, development goals/needs and level of performance.

It is important that the reviewer discusses, recognises and documents where each reviewee has fully met the requirements for the role and level, demonstrated through the achievement of desired outcomes and objectives and appropriate progress on ECDP. This assessment should recognise areas where the reviewee has demonstrated over-achievement indicative of exceptional performance, by the fact that some objectives may have been delivered to a standard over and above those expected for the role and level and general achievements are beyond those realised for the role, as well as areas where potential improvements could be made.

## 8.1 Performance Concerns

An Improved Performance Required outcome will normally only be applicable where a staff member has previously been involved in discussion about their level of performance. This may have involved local People & OD support and:

- a previous discussion between the line manager and a reviewee as part of the normal management feedback processes (one-to-one meetings) or a previous

inconsistent performance assessment

- objectives having been set for the required areas of performance improvement with a jointly agreed plan for their implementation
- the reviewee having been given a realistic opportunity to have made some impact upon the required improvement objectives.

The criteria outlined above should be carefully followed where the level of performance justifies an IPR outcome.

On completion of the annual exercise with performance assessment outcomes applied, each School should review the distribution of these outcomes to ensure consistency and appropriateness.

## 9. Reviewer Summary

Following the PDR discussion, the reviewer should summarise their assessment of the reviewee's performance and development during the review period, along with agreed focus areas for the year ahead.

In addition, reviewers will be asked to consider three separate statements. Each statement should be assessed independently. Where a statement applies to the reviewee, the reviewer should select the corresponding checkbox. Where a statement does not apply, no selection should be made. Reviewers may select more than one statement where appropriate. The reviewer should clearly explain the rationale for any statement selections during the PDR discussion and record this in the reviewer narrative.

Colleagues participating in the Early Career Development Programme and those based at University of Glasgow Singapore will retain the performance assessment outcome options as detailed in Section 8. As a result, Statement 1 does not apply to these colleagues. However, reviewers should still consider whether Statement 2 and/or 3 applies.

### 1. **The reviewee is maintaining or exceeding the expectations of the role.**

This should be selected when the colleague is performing at or above the expectations of their current role. In making this assessment, the reviewer should draw on a range of sources, which will typically include delivery against agreed PDR objectives, the job description, and relevant Job Family Profiles or Academic Grade/Zone criteria.

### 2. **The reviewee would benefit from additional support, guidance or development to enable further progression.**

This should be selected as part of an early intervention approach where additional support, guidance, and/or development would be beneficial in helping the colleague meet current and/or future expectations and aspirations.

### 3. **The reviewer may wish to recommend that the Head of School/Service reviews the completed form.**

This should be selected to highlight performance that significantly exceeds expectations, or where a reviewee would benefit from additional support or development that may require further consideration or involvement from the Head of School/Service, as appropriate.

## Reviewee Feedback

The University is committed to ensuring all employees have a meaningful discussion about their performance, development and career aspirations during their PDR conversation. To provide University leaders with high-level feedback on the PDR experience in their areas, reviewees will

be asked to indicate whether they have had a constructive PDR conversation. This data will be collated by People & Organisational Development, with anonymised and aggregated feedback reported to senior leaders at a unitary level.

Separately, if colleagues wish to discuss their PDR experience further, it is recommended that they do so initially with their reviewer directly. If necessary, they may also discuss their experience with their line manager (if different from the reviewer), the next level of management within the organisational hierarchy, or by raising an enquiry on the [People & OD Helpdesk](#).

## Resources and Training

A suite of resources is available to both reviewees and reviewers on the [PDR Webpages](#). They include practical guidance such as how to create SMART objectives, and links to relevant supplementary information on University Strategy, Values etc.

Details of further development opportunities is available via the [Organisational Development](#) webpages.

## 10. Equality and Diversity

The Performance Development Review process will operate fairly and consistently reflecting the University's Equality and Diversity policies. It will focus on reviewing individual performance in the past year, based on merit alone. It will also take into consideration the development needs of the reviewee for the forthcoming year, reflecting the University's strategic goals in objective setting, and addressing any skills gaps. Further information is available on the [Equality & Diversity](#) webpages.

## 11. Data Protection

All PDR forms and associated documentation will be treated in the strictest confidence by all participants in the process. Please note that completed forms are accessible to those within the line management hierarchy and to the relevant People & OD teams who may, on occasion, review forms to ensure consistency in application and practice. For ECDP participants, completed forms may also be accessible to select local senior managers as part of the Quality Assurance process and to facilitate the provision of appropriate support. Further detail can be found on the [Staff Privacy Notice](#). PDR content may be used to inform other processes linked to Promotion, Regrading and Rewarding Contribution.

| <b>Document Control</b>    |                                                                       |
|----------------------------|-----------------------------------------------------------------------|
| <b>Policy name</b>         | Performance Development Review Process & Guiding Principles 2025-2026 |
| <b>Implementation date</b> | July 2026                                                             |
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| <b>Next review</b>         | July 2027                                                             |
| <b>Owner</b>               | Central People & OD – Performance and Reward                          |
| <b>Drafted by</b>          | Director of Performance and Reward                                    |