

PDR 2018 to 2019: Frequently Asked Questions

Section 1: Eligibility

1. Who is eligible to complete a PDR review (exemptions)?

The following categories are **fully** exempt from the process:

- Those on a NHS clinical academic pay scale;
- Individuals who are on a contract of less than 0.2FTE;
- Those who have been on leave for the entire review period.

The following categories are only eligible to **set objectives only**:

- Individuals who started on or after 1 January 2019;
- Individuals who increased their hours from 0.2FTE after 1 January 2019

Section 2: Assessment

1. How will I be assessed if I have only been here for part of the PDR year – e.g. those on maternity/parental/long term sick leave?

Your final rating should be assessed as though you would have maintained the same performance level if you had been here for the full period. Objectives should be pro-rated to take into account that you have been here for only part of the year.

2. What happens if I am promoted to a new grade during the assessment period?

You will still need to complete a performance assessment.

3. What happens if I change line manager during or after the assessment period?

Both your current and previous line manager should agree your overall performance rating.

4. What happens if my line manager is unable to complete my assessment?

If they are on long-term sick and therefore unable to complete this, their line manager will take over this responsibility.

5. Who will complete my assessment if my line manager has left?

Ideally your line manager should provide your new line manager or HR with an indicative rating prior to leaving. As this is not always possible, the next level up will be responsible for providing you with your rating.

6. What if I don't agree with my final assessment?

You should raise this with your line manager in order to understand their rationale and thereafter your local HR team will be able to advise.

Section 3: Payment Award

1. Who is eligible for payment?

All those who meet the pre-requisite performance criteria will be eligible for payment unless they are exempt as detailed below.

Exclusions:

- Those employed on the Research & Teaching family who were promoted in the most recent academic promotion round; including in-year successful fast track applications;
- Professional Services staff who were Regraded and those who received an in-year salary uplift between 1 July 2018 and 30 June 2019;
- Those staff not employed on University terms and conditions which include:
 - Marie Curie Fellows
 - MRC pay scale
- Those who leave the University prior to the payment date.

2. What happens if I leave before payment is made?

You will not be eligible for payment.

3. How will payment be calculated if I have two different assessment levels?

Payment will be pro-rated accordingly to the School/Service in which you meet the payment assessment criteria:

For example:

0.5 FTE School of Maths: Exceptional

0.25 FTE: School of Physics: Strong

0.25 FTE: School of Geographical and Life Sciences: Strong

School of Maths FTE payment is £1,000

Payment is calculated as follows: $£1,000 \times 0.5 = £500$

Nb. Payment is only made on Exceptional ratings.

4. If eligible for payment when can I expect it?

Payment dates will be published during the review period.

5. I am in receipt of a market/recruitment/retention supplement, will this also be reviewed at this time?

No, this will be reviewed in accordance with the [Market Supplement Policy](#).

6. I am on a zero hours contract, am I eligible for payment and if so, how will my payment be determined?

This will be calculated on the basis of the number of hours you worked during the assessment period as a percentage of the FTE for your grade.

For example:

You are a grade 5 and on spine point 18.

FTE Salary: £23,334

Basic rate payments received during assessment period: £11,247

FTE equals: £11,667/£23,334 = 0.5 FTE
 FTE award: £500
 You will receive: £500 X 0.5 = £250

7. If payment is percentage based what is this calculated on?

This is calculated on your base salary only.

Section 4: Rewarding Contribution

1. How does PDR differ from Rewarding Contribution?

PDR is a multi-faceted process which aims to:

- Discuss future development needs
- Discuss career progression, including promotion aspirations;
- Assess performance over a sustained period of time, recognising that objectives may be split over a number of years
- Set new objectives;

Performance outcomes are informed by general contribution, achievement of in-year objectives and overall performance in the post over the review period. Rewarding Contribution is a mechanism to provide a monetary reward in recognition of the contribution an individual has made. The contribution recognises both Sustained and Strong Contribution:

Sustained Contribution

Accelerated incremental progression is the award of an additional increment within the normal pay range or within the contribution range for the grade and is applied to recognise sustained contribution over and above the normal expectations of the role.

Strong Contribution

Non-consolidated awards can be an appropriate form of acknowledgement when staff have worked over and above their role to support a one-off task or project that is finite by nature.

In both these instances, nominations are made by Heads of School/Directors of Research Institute/Directors of Professional Services/Heads of Service.

2. How do I differentiate between making a one-off award or a sustained contribution?

PDR Rating	One-off Award	Sustained Contribution*
Exceptional	Recognises consistently exceeding objectives	Recognises continued and consistent contribution, i.e. over a number of years and consistently exceeding objectives
Strong	Recognises working over and above their role to support a one-off task/project which is finite in nature.	Overwhelming evidence of sustained strong contribution, i.e. over a number of years

* Only awarded following prior agreement as outlined in Rewarding Contribution.

Employees **will not** be eligible to receive **both** a one-off award and a sustained contribution.

Section 5: Timetable

3. What is the timetable for completion?

The PDR process timeline is as follows:

Staff Groups	PDR Cycle	Online PDR forms available
All Staff	1 July 2018 – 30 June 2019	Mid-July – 30 September 2019