The purpose of this guide is to provide you with a complete overview on how to complete and assess your team’s PDR forms.

Review Period (i.e. the period you make your assessment upon): **1 June 2019 to 30 June 2020**
PDR Form available for completion: **July to September 2020**

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All Year

- Active conversations with employees to discuss progress

**July to September: Annual Review**

- Discuss individual performance with Senior Management and agree indicative assessment ratings
- Set up review meetings
- Launch form in the PDR Portal
  - Review overall progress against each objective
  - Meet and discuss progress with employee;
  - Provide notification of PDR assessment rating;
  - Discuss and agree objectives for next PDR year.
- Update form with final assessment
  - Add commentary as required

**Checklist: Have you…?**

- Set up your review meetings?
- Reviewed assessment forms prior to the review meeting?
- Considered final assessment rating prior to the review meeting?
- Updated the assessment with your comments and completed the sign-off?

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Can be done either prior to formal review of the finalised form or after depending on knowledge of the reviewee’s ongoing performance garnered during active conversations.
### Reviewing the Self Assessment Form

<table>
<thead>
<tr>
<th>Section</th>
<th>Points for consideration</th>
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<tbody>
<tr>
<td>Review of Performance</td>
<td>• How well has the reviewee delivered against their objectives in conjunction with delivering day to day tasks;</td>
</tr>
<tr>
<td></td>
<td>• How has the reviewee delivered against the University values;</td>
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<tr>
<td></td>
<td>• Has the objectives been delivered within the timescales set;</td>
</tr>
<tr>
<td></td>
<td>• What has been the impact of the results achieved;</td>
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<tr>
<td></td>
<td>• How have they performed against their job description, job family, and for those in the R&amp;T job family: Academic Promotion Criteria, Professorial Zone Descriptors and Russell Group benchmark data?</td>
</tr>
<tr>
<td>CPD/Career Planning</td>
<td>• What further development is required in order to meet the team’s strategic plans and objectives and support their career development;</td>
</tr>
<tr>
<td></td>
<td>• Have they applied the skills to their overall career development/progression;</td>
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<tr>
<td></td>
<td>• Is there any specific University led training which could assist in their career development/progression, e.g. mentoring;</td>
</tr>
<tr>
<td></td>
<td>• Is there formal CPD required;</td>
</tr>
<tr>
<td></td>
<td>• How can you support the reviewee's CPD/career development?</td>
</tr>
<tr>
<td>Final Rating</td>
<td>• Use the Performance Assessment Levels to consider which has the best overall fit;</td>
</tr>
<tr>
<td></td>
<td>• Ensure that you can justify your rating with specific examples;</td>
</tr>
<tr>
<td></td>
<td>• Must be discussed that the Review Meeting</td>
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</table>
The Review Meeting

The review meeting is a face-to-face two way discussion between Reviewee and line manager (reviewer) to:

- Review and discuss development including future career aspirations
- Review and assess the previous year’s performance;
- Discuss areas of excellence and areas for development;
- Discuss feedback from other areas;
- Set objectives

Prior to the meeting you should:

- Review and reflect upon the completed PDR form and consider how you initially assess the performance considering:
  - Key points (achievements/accomplishments/challenges) you wish to focus on,
  - Obtaining feedback from multiple sources
- Plan for the next review period considering:
  - Objectives required in order to support the delivery of the team’s strategic plan,
  - Development opportunities in the delivery of the team’s strategic plan
Feedback is intended to be constructive in order to enable the reviewees to further their development. You should:

- **Focus on job performance:**
  - Describe areas of effective performance,
  - The way in which objectives were accomplished or approached;
  - Focus on specific areas in an evaluative way.

- **Provide Balanced Feedback:**
  - Provide and equal balance of feedback, both positive and negative;
  - Recognise key aspects of job performance that have been performed well along with opportunities for improvement

- **Focus on self assessment and a solution based approach:**
  - Encourage the reviewee to assess what they have done well and what they could have done better;
  - Focus on reaching mutually agreed solution planning for future success

- **Encourage two-way feedback:**
  - Ask open questions to explore areas of relevance;
  - Provide opportunities to outline ways in which the reviewer can assist and support the reviewee in effective performance in the role.
The Review Meeting: Challenging Conversations

Reluctant Participant:

• Prepare in advance ensuring common understanding of expectations prior to the meeting;
• Ask open questions in a friendly manner, e.g. “Tell me how you approached X, Y, Z;”
• Provide specific examples to help the reviewee understand their strengths and opportunities for improvement

Unfocused Participant:

• Encourage participation, e.g. “In a few words/give me two examples,”
• Keep the conversation moving, e.g. “now that we’ve discussed X, let’s talk about Y.”
Objective Setting

Our full SMART Objective Guide is available online, and below is a summary of the key points:

Objectives should be SMART

• **Specific:**
  - Should be sufficiently detailed and precise to be clearly understood by you;
  - Should not be ambiguous – targets and their importance are clear

• **Measurable:**
  - Must have a measurable and verifiable outcome to show how well the objective has been achieved, this can be through:
    - **Quantity** – e.g. completion rates, costs
    - **Quality** – e.g. levels of accuracy or a defined measurable standard
  - Consider how it will be indicated if the objective has been achieved and what mechanisms are required to measure results

• **Aligned/Achievable:**
  - Should be aligned to the strategic plans and objectives of the Service/School/RI and appropriate for your role and grade;
  - Should take into account as to the timeframe and resources required to achieve these
  - Within your capabilities but challenging

• **Relevant:**
  - Within the remit for your role and grade, yet challenging to in order provide room for development;
  - Consider the impact if the objective wasn’t achieved in relation to the team/School/Service/College/RI;

• **Time Bound:**
  - To be delivered within a specific timeframe – sometimes this may be over a period of a few months or even years
## Objective Setting: Examples

<table>
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<tr>
<th>Job Family</th>
<th>Example</th>
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| **Management, Professional & Administrative (MPA)** | • To effectively and efficiently take the lead on organising the logistics for the annual Staff Administrators Conference scheduled for dd/mm/yy by achieving a score of 4 out of 5 on average from customers on the feedback form.  
  • To review the school’s filing systems and make recommendations for improvements to Line Manager by mm/yy with agreed implementation of recommendations by dd/mm/yy. |
| **Operational** | • Create a comprehensive information pack for all Residencies students as to the services/facilities/clubs available in the SRS as part of their accommodation package by dd/mm/yy.  
  • Provide a catering food offer that delivers “healthy choices” throughout all hospitality outlets to work towards gaining “Healthy Living Award” by end of mm/yy. |
| **Research & Teaching** | • To have led publications of xx papers of quality likely to be judged 3* or 4* in the REF in suitable/appropriate journals by dd/mm/yy.  
  • To have written as PI (or co-I), with distinctive contribution) research grant applications of a value exceeding the Russell Group median award value of your discipline and have submitted these by dd/mm/yy.  
  • (Teaching): To complete the preparation of and publish a major undergraduate textbook in X by mm/yy.  
  • Improve student engagement in course A by introducing Y innovation and evidence improvement through improved student feedback and attainment by mm/yy. |
| **Technical & Specialist** | • To set up a process to inform and update a data base recording the service’s use of substances hazardous to health under COSHH regulations by dd/mm/yy.  
  • Ensure all laboratory equipment in building X passes equipment maintenance testing and produce and up-to-date inventory by dd/mm/yy. |
| **Performance Standards (Grades 1-3 only)** | • Describe the conditions that must exist before the performance can be rated Strong and may be defined for repetitive and routine tasks, for example:  
  • To provide cleaning services to achieve 85% standard in visual quality monitoring;  
  • To ensure all student enquiries are dealt with within x days  
  • To ensure mail is delivered to schools by x time each day |
<table>
<thead>
<tr>
<th>Assessment Level</th>
<th>Criteria</th>
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<tbody>
<tr>
<td>Exceptional Contribution</td>
<td>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.</td>
</tr>
<tr>
<td>Strong Contribution</td>
<td>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.</td>
</tr>
<tr>
<td>Inconsistent Performance</td>
<td>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.</td>
</tr>
<tr>
<td>Improved Performance Required</td>
<td>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.</td>
</tr>
</tbody>
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The Glasgow Professional

PASSIONATE
We are:
- Creative, curious and deeply committed to the pursuit and sharing of knowledge.
- Dedicated to our students, actively seeking to develop their skills, knowledge, understanding and sense of citizenship.
- Ambitious, adventurous and confident, with the courage to accept and balance the risk of failure with reward in pursuit of progress.

PROFESSIONAL
We are committed to:
- Striving for excellence in everything we do, undertaking our work with the pride and care, and offering the very best service to our students, customers, partners and colleagues.
- Embracing diversity and difference and treating colleagues, students, visitors and others with respect.
- Sharing our work openly and actively, seeking out opportunities to collaborate without local and international partners.

PROGRESSIVE
We believe that:
- We have a social and environmental responsibility to undertake our work in an ethical and sustainable manner.
- Studying at our University should be possible for anyone with the necessary talent, commitment and potential, regardless of background or belief.
- We should use our work to benefit and enhance Glasgow, the West of Scotland and the global community wherever possible.