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Personal Development Review

Guidance for Managers

All the information you need to conduct a successful Personal Development Review (PDR).

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# A PDR and How to Do It

The performance development review is a discussion between an employee and their supervisor. They assess the employee's performance over the last, recognise achievements and talk through areas for employee’s development and improvement. When included as part of the continuous performance management process the review becomes an excellent period of reflection for both the employee and manager and gives employees the chance to plan for their future development.

## Preparation

Give a clear framework for the review timeline and the deadlines employees need to meet, well ahead of the review period. Publish the self-assessment document content along with your timeline so that your team member has a chance to prepare. If they're aware of what's involved they can properly plan their time to get the most out of the review discussion. Their self-assessment is just as important as the manager's assessment.

Read your employees' self-assessments well ahead of time and make notes for the meeting. There is nothing more demotivating than a manager who doesn't prepare. You need to be encouraging and engaging, especially when intervening on poor performance.

As much as possible stick to the agreed date and time of your review. Rescheduling sends the message that you've got more important things to do than focus on your employee.

Have all of the day-to-day data - your aligned goals, performance measures and 121 meetings to hand to give both employees and yourself the space to focus on the overall employee contribution.

## Conducting the Review

The importance of the employee self-assessment can't be overemphasised. When that self-assessment is taken into account it's much easier for the employee to deliver a balanced reflection of their performance. Your job is then to provide coaching and suggestions from your own experience to help the employee develop themselves.

Your employee should be speaking more than half the time. The performance review meeting is their time to reflect on their progress and give you feedback on where you can support them. Encourage employees to open up with open-ended questions. Keep the meeting tone conversational.

Goal-based questions are an essential part of the performance evaluation to reflect on what was planned, what was achieved and where things went off track. So long as you have your Goal process defined with regular 121s, the review time doesn't require a lengthy discussion of each individual goal. You should rather focus broadly on whether the goals were too easy or too difficult, what coaching is needed to drive more development and if the context of the goals are clear and relevant for the organisation. You can use your review time to set new objectives for the next year and celebrate achievement.

Be open and honest. Everyone knows inherently what their own strengths and weaknesses are. Being allowed to openly acknowledge what has to be improved without fearing punishment promotes trust between the employee and manager. Be upfront with your criticism and get to the point of what needs to be done to improve it. Your goal is to build trust and that requires honesty.

Use the performance review to determine what action needs to be taken to improve performance. It's no good saying an employee has been underperforming without defining measures to improve it. Determine an employee's training needs, outline specific changes they should be making and provide developmental support from your own experience.

Address training and development requirements. Be aware of what the Hospice can offer in terms of training and development. Even if there aren't formal courses there are plenty of internal resources that can help your employee grow. Think back to your own experience of what worked for you to guide your employee in their self-development.

Agree goals and feedback processes. This will cover your continuous performance management cycle throughout the year. You need to establish regular 121s on goal progress and feedback.

Ideally everyone should be displaying the company values in their approach to work. It's important to be clear that you're reviewing how those behaviours are demonstrated, not what is inherent to someone's personality. What are the actual actions an employee took that showed leadership, for instance? What are some actions they can start doing to encourage better communication? The competencies framework works well both on performance and potential and pulls out where people are strongest and where more development is needed.

Compensation and promotion should not be a part of the review discussion.

## Mistakes To Look Out For

Long, irrelevant review questions!

Managers avoid raising difficult topics with their employees. You can see that an employee has a need for improvement. You know it and they know it, but when looking at the last review this was never raised. This can completely undermine the credibility of future performance management.

Responses are generic and nonspecific. From both the employee and the manager side, this probably means your review questions are not targeted enough. When the review form is relevant and specific to the individual's development, the outcome will be detailed, specific and personal to the individual

The reviewer is not the employee's direct supervisor. For an effective review process to target specific improvements the reviewing manager needs to have a deep knowledge of the employee's day to day duties and responsibilities.