

|  |  |
| --- | --- |
| Employee Name | Click or tap here to enter text. |
| Job Title | Click or tap here to enter text. |
| Department | Click or tap here to enter text. |
| Name of Appraiser | Click or tap here to enter text. |
| Job Title | Click or tap here to enter text. |
| Date of Review | [Publish Date] |

Personal Development Review

Review Document

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1. Overview

Treetops recognises the need to evaluate the performance of each of our employee’s, to value their contribution and to develop them to meet their full potential. The Performance and Development Review (PDR) process is a valuable tool in helping us to do this.

Your performance in your role will be considered in relation to four key areas:

a. The core elements of your role as linked to your job description

b. Operational development objectives

c. Assessment of performance in behavioural values

d. Personal development

Depending in the focus of your role, one or other of these areas may take a higher focus when considering your performance. This will be clearly indicated to you by your line manager when setting out your objectives.

If for any reason you do not agree with the outcome of your PDR then, in the first instance, please raise this with the person who has carried out your review. If this discussion fails to find resolution to your issues and you wish to appeal your PDR, then please contact the HR Administrator who will give guidance on appealing any issues not resolved through the Grievance Procedure.

2. Accuracy of Job Description

You have been sent a copy of the Job Description for your role.

a. Can you confirm that your job description accurate? **Yes** [ ]  **No** [ ]

b. If no, can you detail below areas of your role not shown in your job description so that they can be considered as part of this PDR:

|  |  |
| --- | --- |
| Elements of role not reflected or incorrect on Job Description | Comments |
|  |  |
|  |  |
|  |  |

3. Performance against Job Description (Core Responsibilities)

|  |  |  |
| --- | --- | --- |
| Comments/detail/agreed action | Agreed Timescales | Outcome |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

4. Performance against last year’s objectives

|  |  |  |  |
| --- | --- | --- | --- |
| Objective | Comments/detail/agreed action | Agreed Timescales | Outcome |
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5. Objectives for the next 12 months

Details of Outcome required / progress agreed – Must be measurable quantitively or by time achieved.

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| --- | --- | --- |
| Description of Objective | Comments/detail/agreed action | Agreed timescale / date |
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6. Behavioural Values

The following identifies behaviours which are related to our Treetops values and are essential if we are to maintain and build upon Treetops’ unique culture and levels of engagement.

Please read the Behavioural Framework document, discuss the following questions and then complete the matrix below.

a) How do you contribute to Treetops values in the performance of your role?

b) Are there any values that you could contribute more to? How?

c) Which behaviours do you excel at in the performance of your role?

d) Which behaviours could you develop further in the performance of your role?

|  |  |  |  |
| --- | --- | --- | --- |
|  | Exceeds Standard | MeetsStandard | Requires Improvement |
| Customer Focus |[ ] [ ] [ ]
| Effective Communication |[ ] [ ] [ ]
| Co-operation |[ ] [ ] [ ]
| Pursuit of Excellence |[ ] [ ] [ ]
| Change Orientation |[ ] [ ] [ ]
| Leadership (mgmnt grades) |[ ] [ ] [ ]

7. Review of Progress Against last year’s Training and Development Plan

Review progress against last year’s Development Plan as recorded in previous PDR (carry forward anything outstanding if appropriate).

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| --- | --- | --- |
| Area of Development/Training | Completed  | Comments |
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|  |  |  |
|  |  |  |
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8. Training & Development plan agreed for next 12 months

Any areas of development identified through the PDR process should be recorded below. These should be as specific as possible and can be carried forward items from the development plan discussed during this performance & development review. All training must fit in with the overall strategic aims of the organisation.

NB: Identified training may be subject to financial constraints as determined by the Chief Executive.

|  |  |  |
| --- | --- | --- |
| Area of Development | Agreed progress / achievement to be made and details of related support or tools to be provided / utilised | Agreed timescales |
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9. Discussion on other issues raised in the self-assessment

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|  |

a) Appraiser’s comments:

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| --- |
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|  |  |
| --- | --- |
| Name: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |

b) Appraisee’s comments:

|  |
| --- |
|  |

|  |  |
| --- | --- |
| Name: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |

c) Countersigning signature:

|  |  |
| --- | --- |
| Name: |  |

|  |  |  |  |
| --- | --- | --- | --- |
| Signature: |  | Date: |  |