

# Performance and Development Review (PDR)

The PDR discussion and form should be completed in conjunction with the Guidelines Document <link>.

Reviewee's name	
Reviewee's Job Title	
Reviewer's name	
Reviewer's job title	
Date of PDR meeting	

## Section 1: Performance against Management Competencies\* (If the Reviewee is not a manager of staff, please go to Section 2)

\*This Section applies to all managers who are contracted to manage staff.

*Please refer to Section 1 (Page 8) of the Guidance Notes for further information regarding Management Competencies.*

4 = Exceeds expectations	3 = Meets expectations	2 = Meets some expectations	1 = Performance is unacceptable	NR = No rating/no opportunity to demonstrate
--------------------------	------------------------	-----------------------------	---------------------------------	--

Management Competency	Rating	Strengths/Achievements	Development Areas
<b>Deliver High Performance</b>			
Managing and developing self			
Managing Resources			
Managing Projects			
Managing Customers			
<b>Manage and Develop People</b>			
Developing People			
Managing Individual Performance			
Managing Team Performance			

<b>Lead, inspire and motivate</b>			
Communicating Effectively			
Gaining Commitment			
Strategic Leadership			
Community Leadership			
<b>Build Relationships to Achieve Results</b>			
Managing Relationships			
Managing Conflict			
<b>Champion Continuous Improvement</b>			
Improving Results			
Challenging the 'Status Quo'			
Solving Problems			
Encouraging Creativity			

## Section 2: Review of previous objectives, targets and standards

Refer to previous set objectives, targets and standards by referring to team, service or other plans, the management competency assessment (where appropriate) and previous PDRs. It is important that Reviewers and Reviewees provide evidence of achievement and comment on whether the objectives were met, partly met or not met.

*Please refer to Section 2 (page 9) of the Guidance Notes.*

Objective	Evidence of achievement /comments	Met, partly met or not met?

## Section 2a: Evaluation of the impact of learning activities

If the Reviewee has taken part in any learning and development activities since the previous PDR Review, please discuss and record the impact of the learning activity on the Reviewee's ability to achieve objectives and the quality of service delivery.

*Please refer to Section 2a (page 9) of the Guidance Notes.*

Learning and Development Activity	Impact	Comments

## Section 3: Set objectives, targets and standards for the forthcoming period

Discuss and agree what the (SMARTER) objectives, targets and standards are that need to be achieved during the next review period.

*Refer to Section 3 (Page 9) of the Guidance Notes.*

Objective	Measure of success (How will we know when it is achieved?)	When?	How will this objective be evaluated & reviewed?

## Section 4: Performance against Organisational Values

Discuss the organisational values in the context of the Reviewee's job role.

*Please refer to Section 4 (page 10) of the Guidance Notes.*

Value	Comments
<ul style="list-style-type: none"> <li>• A focus on the people of Leicestershire</li> <li>• Being positive</li> <li>• The desire to achieve results</li> <li>• Flexibility</li> <li>• Co-operation</li> <li>• Speaking up</li> </ul>	

## Section 5: Development Planning

Please refer to the objectives set for the forthcoming year and Learning Pathways in order to discuss development requirements.

Please refer to *Section 5 (Page 11) of the Guidance Notes*.

Job Specific Development needs	What will this learning achieve?	When?	Low / Medium / High	Who is responsible?

Developmental / Aspirational needs	What will this learning achieve?	When?	Low / Medium / High	Who is responsible?

## Section 6: Performance Summary

Summarise individual performance and contribution to overall service delivery during the period.

Refer to *Section 6 (Page 12) of the Guidance Notes*.

Reviewer's comments on performance	Reviewee's comments on performance

Reviewee's Signature	
Date	

Reviewer's Signature	
Date	

**Please ensure that the date of this PDR is recorded on the Oracle Self Service section for Managers under 'PDR Tracking'**

Date of PDR review	
--------------------	--

## Section 7: PDR Interim Review Discussion

Please refer to Section 7 (Page 13) of the Guidance Notes.

Reviewer's name	
Reviewer's job title	
Date of review meeting	

**Please ensure that the date of this PDR Review is recorded on the Oracle Self Service section for Managers under 'PDR Tracking'**

Summarise the interim review discussion in relation to the annual PDR.

Please use additional pages as required.

## Section 7a: Evaluation of the impact of learning activities

If the Reviewee has taken part in any learning and development activities since the previous PDR, please discuss and record the impact of the learning activity on the Reviewee's ability to achieve objectives and the quality of service delivery.

Please refer to Section 7a (page 13) of the Guidance Notes.

Learning and Development Activity	Impact	Comments