

PDRF – Your Responsibilities

Aim

The aim of PDR is for you and your manager to have regular and meaningful conversations throughout the year about agreeing your goals and being clear on what is expected of you; taking the opportunity to discuss your performance and behaviours and building on your strengths and identifying any areas for development in a structured way.

To get the most out of PDR it's important to build up trust in the discussions by means of mutual openness and honesty and for both parties to fully participate in PDR.

Your responsibilities – in summary

Employee	Manager
<ul style="list-style-type: none">• Meet with your manager to agree your objectives for the year and be clear about what is expected of you.• Schedule monthly and year end performance discussions with your manager. The year-end meeting should take place in April/May.• Gather feedback on your performance throughout the year – both your strengths and areas for development.• Discuss the behaviours framework; get a feel for what they mean in your role and how you can demonstrate them.• Prepare for your meetings by visiting the intranet which explains the process and offers a toolkit of resources.• Review your development needs and agree a plan with your manager.• Actively participate in your monthly and year end discussions with your manager.• After your meetings, update your PDRF record and agree the record with your manager. This important step to ensure that you gather your evidence base throughout the year and forms your official record of performance.	<ul style="list-style-type: none">• Be prepared and hold regular and one to one meetings with your direct reports.• Explain Council, Directorate and Service objectives and how the employee contributes to service outcomes in their role.• Be clear about what is expected of the employee in their role and ensure this is accurately documented in the PDR template.• Discuss the behaviours framework and agree how this will be measured against individual goals; help to explain what they mean and how this can be demonstrated.• Agree a plan for learning and development activities.• Provide regular and on-going feedback on performance and development throughout the year.• Review performance using the agreed goals and PDRF and propose provisional ratings at year end following your discussions with the employee.

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Goal Setting

For most employees objectives will come from a combination of Council, Directorate and Departments plans, your role responsibilities and personal objectives that relate to your development goals.

What preparation should I do for discussing my objectives with my Manager?

As an individual you should consider:

- How well you are performing the requirements of your role (this will have been included in your year-end discussion)
- What are the team / department goals / strategy?
- What can you do to help deliver these?
- What can you do to make Solihull MBC a great place to work?
- What external factors exist?
- What strengths and skills do you bring to your work?
- What other projects / initiatives would you like to get involved in?

Capture your initial thoughts and use these as a base for your discussions with your manager.

What preparation should my manager do?

Your manager will help you to put appropriate objectives in place by:

- Ensuring you understand the key priorities and accountabilities of your role.
- Explaining how you can contribute to the team / department goals and broader strategy
- Explaining what that looks like in terms of behaviours you need to demonstrate to deliver your objectives.
- Describing other projects / initiatives to which you might be interested in contributing
- Ensuring your objectives are SMART (Specific, Measurable, Agreed, Realistic and Timebound) and reflect the right balance.
- Ensuring that you agree times to review your progress against your PDRF plan.

When setting your objectives you and your manager need to be as specific as possible about the outcomes, activities, deadlines and behaviours you will focus on to deliver the objective as well as agreeing an appropriate way to measure this success that you will both recognise.

Reviewing Performance

When you sit down with your manager, you will discuss progress against your objectives along with your ideas and aspirations for development and training. Remember, it is your opportunity to discuss your performance and development, to ask questions and seek support. It is your meeting.

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Monthly One to One Meeting

Make the most of your one to ones meeting during the year, the primary focus being on discussing your progress against your objectives, your achievements and development to keep things on track.

The monthly meeting should build up a picture of **how** you are achieving your objectives, as well as **what** you are achieving including where applicable any actions and improvements that are necessary to get your performance back on track.

In advance of your meeting you should think about and be prepared to discuss what you have progressed since your last meeting and feedback on any agreed actions for which you are responsible.

Year End Review Meeting

What should I do to prepare for my year-end review meeting?

The housekeeping:

- Plan in the appropriate time to hold your Year End Review – usually April / May
- Start preparing in good time.
- Find a quiet and private location
- Gather your evidence and one to one notes

Using information from your one to ones think about the following areas as guidance in your preparation:

- The past year: review your performance
 - What goals and objectives you have achieved during the year
 - Where have you had success and where have you done less well?
 - What was in your control / outside of your control?
- Your objectives:
 - How have these objectives contributed to the Lives not Services agenda?
 - Are the demands in line with the results achieved?
 - What duties could have been developed further?
 - Are your knowledge, skills and experience utilised in your work?
- Your behaviours :
 - How have your behaviours contributed to the Lives not Services agenda?
 - How have you adopted the behaviours in the delivery of your objectives?
 - How has this helped you to perform your job to the best of your abilities?
 - How have you contributed to the working environment

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- Feedback:
 - What do your colleagues and customers say about you?
 - How have you used this feedback?
 - What are your strengths and weaknesses?
- Development
 - How have you developed your skills, experience and knowledge?
 - What goals do you want to set for your development next year?

Conducting the year-end review meeting

The aim of the meeting is not only to review performance over the past year, but is also to provide an opportunity to develop your relationship with one another.

Your manager will be responsible for leading and steering the discussion and setting a relaxed and natural atmosphere. They will encourage you to be open and fully participate in the discussions and will want to hear your own review of how you have performed against your objectives and what you have achieved.

This may include exploring with you:

- What do you see as the highlights / successes / achievements from the year and how does this align to your objectives?
- How you have contributed in terms of behaviours?
- How you have progressed your development?
- Feedback from colleagues and customers
- What ideas you have for development next year and your aspirations?

At the end of the meeting think - did all the important points come up in the discussion, is there anything you need to add or obtain more information about?

After completing the review this should be written up as a joint summary in your Annual Review Summary and define any actions to feed into your goal setting meeting.

Your Development Plan

When putting together your Personal Development Plan, these are some of the things to consider:

- **Question** – What capabilities will be required to carry out the job and how do I want to develop in the future?
- **Understand** – What capabilities you have and the gaps between this and what you are looking to achieve?
- **Planning** – Identify what training, learning and development resources and opportunities are available to you and how can you develop measurable goals?
- **Review** – how will you measure your achievements and track your progress against your goals?

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Consider the wide range of learning methods:

- **On-the-job training**
Basic or general on-the-job training, typically learning through observing and/or being assisted by a colleague with more experience of performing a task.
- **In-house development programmes**
This covers a very diverse range of learning interventions that are longer-term, broader and/or of a higher level than basic on-the-job training.
- **Coaching and mentoring**
Coaching and mentoring are development techniques based on the use of one-to-one discussions to enhance an individual's skills, knowledge or work performance – often for the current job, but also to support career transitions.
- **Job rotation, secondment and shadowing**
This can be a very effective way of learning and practicing new skills.
- **Action learning and learning projects**
Action learning is a method of collaborative learning where a small group of learners (an 'action learning set') meet regularly to reflect on real work issues. Its basic philosophy is that the most effective learning takes place when individuals are faced with a real problem to solve.
- **E-learning**
This involves the use of learning materials delivered electronically.
- **Blended and 'bite-size' learning**
Certain forms of learning work best together (for example, e-learning is often more effective when blended with more formal types of learning) in a technique that has become known as 'blended learning'.
- **Knowledge management**
This involves gathering teams together at the end of projects to review how they have worked and to record 'lessons learned'. These events allow for participants to learn better ways of working together, or improve processes.

The choice of learning methods for each need identified will depend on several factors including:

- the nature and degree of priority of the learning needs
- evaluation of the effectiveness of previous learning and development interventions
- costs and budgets available
- learner preference

Look at the Training and Development section on the Intranet for more information.