

Review Phase Checklist

Use this checklist to ensure that you have fulfilled your responsibilities in the Review phase of PDR:

Before the conversation

<input type="checkbox"/>	Regular review and feedback conversations conducted throughout the review period to ensure that there are no surprises for you or the staff member during the review conversation.
<input type="checkbox"/>	PDR Review conversation time and place agreed – allow sufficient time to conduct the meeting in a focused, but relaxed way and choose a private and comfortable venue with no interruptions; conducive to discussion, but not too informal.
<input type="checkbox"/>	Staff member has been made aware, at least two weeks before the meeting, of the purpose and agenda for the conversation and how they should prepare for it.
<input type="checkbox"/>	Relevant documentation and evidence / performance ‘data’ in relation to the staff member’s achievement against work and development objectives gathered.
<input type="checkbox"/>	Thought given to and notes made on each of the sections for discussion with the staff member.
<input type="checkbox"/>	Pitfalls and challenges that could jeopardise the success of the Review conversation identified.
<input type="checkbox"/>	Thought given to and notes taken on workload modelling (<i>Academic Staff only</i>).

Documentation and Follow-up

<input type="checkbox"/>	Formal, interactive Review conversation held and documented (consider ways to reduce process administration that are suitable for your area).
<input type="checkbox"/>	Documentation completed and signed by all – copies for you and the staff member to be used as a basis for ongoing discussions.
<input type="checkbox"/>	Follow-up discussion times and possible milestone conversations scheduled.
<input type="checkbox"/>	Staff development support / resources made available as agreed with the staff member.
<input type="checkbox"/>	Milestones, follow-up conversation activities diarised.
<input type="checkbox"/>	Documentation stored in an accessible and secure location.
<input type="checkbox"/>	Copy of the documentation made available to Head of School / Unit as appropriate.
<input type="checkbox"/>	Implications of the review on aspects such as development needs, career planning, promotion and succession planning considered and actioned.
<input type="checkbox"/>	Report to Head of School or Unit on completion of the PDR process.
<input type="checkbox"/>	Feedback to Human Resources on suggestions for improvements and or support for the process submitted.

Review Conversation Planning Template

Please use the Review Conversation Framework below to prepare for an actual Review conversation that you will be conducting in the future.

Discussion Points	Preparation Notes
<p><i>Set the Scene</i></p> <p>Open and set the tone:</p> <ul style="list-style-type: none"> • state the purpose and importance / value of the conversation. • stress that the staff member's input is invaluable and that it is planned as an interactive conversation. • give an overview of the points that will be discussed. • demonstrate a relaxed, attentive and positive approach and a willingness to spend time to listen and support the staff member. 	
<p><i>Gain their perspective on</i></p> <p><u>Key Successes</u></p> <ul style="list-style-type: none"> • Ask about, listen attentively and acknowledge their view of their main achievements / strengths / performance and development highlights / progress made during the period under review. • Give specific, positive feedback on your view of their key achievements / key contribution / progress in the period under review (SBI feedback). <p><u>Key challenges</u></p> <ul style="list-style-type: none"> <input type="checkbox"/> Ask about, listen attentively and acknowledge their high-level view of the main challenges and difficulties experienced during the period under review - recognise factors that may be beyond the staff member's control. 	

Discussion Points	Preparation Notes
<p><i>Give feedback and discuss</i></p> <p><u>Work and Development Objectives</u></p> <ul style="list-style-type: none"> • Discuss and give the staff member feedback on their progress against each agreed work objective using supporting examples, observations, and performance data. • Identify objectives that have been achieved, the reasons and impact of this. Discuss ways in which their achievements / key strengths can be shared / leveraged / extended. • Identify objectives that have not been achieved and discuss reasons and impact of this. • Discuss any difference in views between you. Explore what the differences are, why they exist and any difference in evidence presented. • Where needed, re-confirm objectives and performance standards and use a coaching approach to support the achievement of these objectives in the future (GROW). • Comment on work allocation (Academic Staff only). • Discuss and give feedback on the staff member's progress against their personal development plan. 	
<p><i>Ask for Feedback</i></p> <ul style="list-style-type: none"> • Invite the staff member to provide feedback on any relevant workplace issues they might wish to raise. Ask for feedback on how they have experienced your role as supervisor. • Listen to and thank the staff member for their feedback. 	