

Performance and Development Review

This is simplified PDR form can be used for Professional Services colleagues to guide your PDR conversations.

While it is helpful to dedicate some time to have an annual review, conversations about these topics should be held regularly throughout the year – this document is a reference document that can be used to record and inform your conversations, highlighting particular points as required. It can be stored on the reviewee’s local drive with sharing permission given to the reviewee.

For information, advice and training about conducting PDR conversations please visit [PDRs | Learning and Development | University of Exeter](https://www.exeter.ac.uk/staff/learning-and-development/pdrs/) . The PDR Booklets for Reviewers and Reviewees are a great place to start when thinking about your PDR. In addition to the information on these PDR pages colleagues are encouraged to read through the differential impact information for [**Professional Services** colleagues](https://www.exeter.ac.uk/departments/inclusion/visionandpolicies/psimpacts/)to better understand the effects of the pandemic on careers.

This template can be adjusted to suit local needs as agreed between reviewer and reviewee. A more detailed, longer, template is available under the Reviewee column on the ‘[Training, Guidance, Records](https://www.exeter.ac.uk/staff/learning-and-development/pdrs/)’ tab on the PDR webpages, which guides colleagues through the PDR conversation.

Reviewers and reviewees may also wish to visit the [Exeter Professional pages](http://www.exeter.ac.uk/staff/exeterprofessional/) which contain information about Academic careers.

## Your details

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| --- | --- | --- | --- | --- |
| Name of reviewee: |  | Period covered by review (ie previous 12 months) | From: |  |
| To: |  |

## Signatures (once review agreed)

Reviewee: Date:

Reviewer: Date:

(Add reviewers as needed depending on the role – eg in a matrix or joint management situation)

# Career aspirations and plans

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| **Area discussed** | **Key points raised** | **Action points** |
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| --- | --- | --- |
| **Area discussed** | **Key points raised** | **Action points** |
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# Workload and resources

# Wellbeing (Please consider the five Positive Working Environment pillars below)

Pay, benefits, rewards and recognition

Development

Relationships

Physical environment

Work

Mental
and physical health

Having a balance between the efforts we make and the pay, benefits and rewards recognition we receive.

Developing professionally and personally.

Building positive relationships with each other and the University. This includes communication, values / ethics / morals, sense of community.

Working in a safe and stimulating physical environment.

Managing our work in a healthy way. This includes work demands, work patterns, resources, role purpose and change management.

Looking after our mental and physical health. This includes awareness, support and
self-care.

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| **Area discussed** | **Key points raised** | **Action points** |
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# Last year’s objectives

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| **Area discussed** | **Key points raised** | **Action points** |
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# This year’s objectives

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| **Objective** | **Comments** | **Action points** |
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# Development areas identified (including confirmation of mandatory training completion)

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| **Development** | **Resources needed – time, money etc** | **Action points – who will take this forward?** |
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# Priority action points from this discussion

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| **Priority action** | **Who is taking action** | **Milestone/deadline for completion** |
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