



University
of Exeter

PDR Reviewer Training for Reviewers of Research Staff

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Be clear about the purpose

Check-in

- *Time to pause and reflect*
- *How are they? How has the year been?*
- *Their wellbeing topics*

Performance

As appropriate for role, reviewing and planning forward:

- *discuss research grants,*
- *Projects,*
- *PGRs (as appropriate)*
- *Publications*

Development

- *Address challenges and gaps*
- *Take advantage of opportunities*
- *Getting to next career stage – do they need further help from someone else?*

Review

- *Signpost other services and support*
- *Do they need a mentor to help with things you can't*
- *Determine actions going forward which will help to achieve the identified goals*

Record

- *Identify any wellbeing matters that need more attention*
- *identify and note achievements and challenges*
- *identify and note plans to develop and progress, use opportunities, deliver outcomes*



Set everyone up for a good review

Prepare your reviewees

- Set the scene with your reviewers (*why do PDRs, what's your approach, timelines, who does what and when*)
- Ask reviewees to gather data and examples and identify key things they want to talk about
- Let each one know what in particular you want to talk about, given what you know about their priorities, issues, opportunities
- Have an agenda

Prepare yourself

- Build empathy, get to know them and their work
- Be informed (about them, the Dept, The Faculty, The University, the bigger picture)
- Triangulate with others if you need to

Schedule time

- Enough time to be valuable, not rushed or overlong
- At a time to suit you both



Use a coaching style



Non-Directive



Directive

Level of reviewee understanding, learning and insight



Use the GROW model

G Goals – clarity, useful objectives

R Reality – honesty, examples

Don't avoid difficult topics; listen & ask questions; support them.
Might need to get HoD involved. Might need to signpost other services

O Options – and consequences

W Will – gain commitment

Agree a milestone checkpoint to look at progress



Be solution focused

We tend to start with

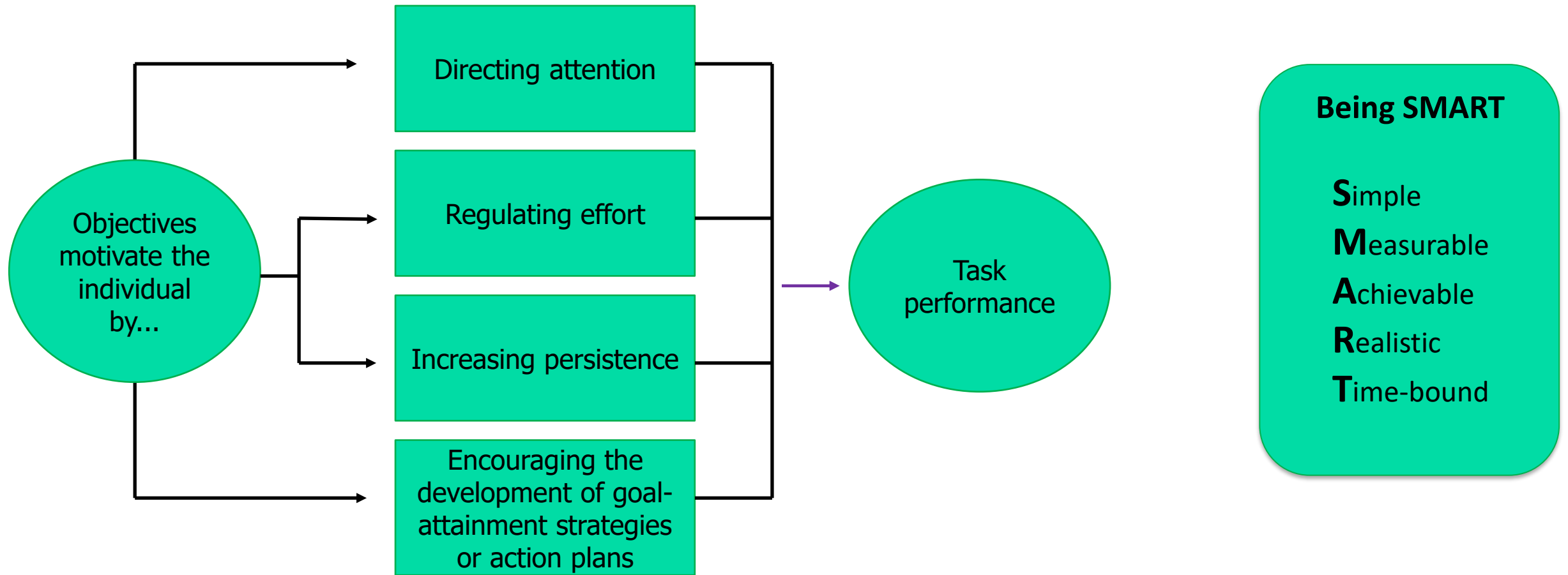
What's wrong
What needs fixing
Unknowns
Deficits and weaknesses

We can choose to start with

What's wanted/needed
What's working
Knowns
Resources and strengths



Help identify useful objectives



Advise, guide or refer

Know your limits

Offer your advice and guidance when you can

Refer to other help

When you don't know maybe someone else will

There are loads of useful resources – what are the most useful?



[Exeter Academic](#) (probation, promotion, development, role profiles)

[Early Career Researcher Development](#)

[Research Toolkit](#)

[Staff Wellbeing](#)

[Leadership development](#)

Mentoring support is available

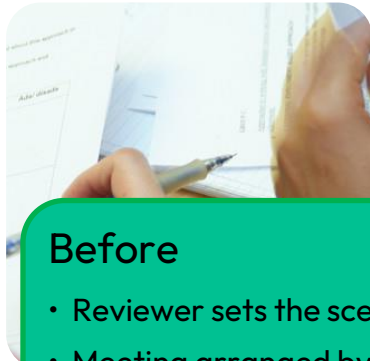
Use the One Step Beyond scheme or whatever is set up in your area of work



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Summary and timeline

March-May



Before

- Reviewer sets the scene
- Meeting arranged by reviewee
- PDR form completed by reviewee
- Agree timing and who does what



June-September



PDR meeting

- Put Reviewee at ease
- Use a coaching style
- Work through reviewee's agenda
- Advise/guide/refer



All year round



Follow – up

- Check on progress with actions
- Arrange regular catch-ups
- Keep conversation going
- **December PDR catch-up**

