The purpose of the Performance Development Discussion (PDD) is to provide an opportunity for reflection and feedback on the previous year, and for the appraisee, in discussion with you as their manager/appraiser, to identify areas of development and support to enable them to achieve their objectives for the following year and any future career aspirations.

The PDD is:

- a positive, constructive, two-way discussion
- a formal overview and an opportunity for you as the manager/appraiser to reflect on the appraisee’s achievements of the previous year
- an opportunity for you and the appraisee to focus on what they will be doing in the coming year
- part of a process to help the appraisee improve their effectiveness and efficiency
- an opportunity for you to discuss the appraisee’s personal, professional and career development
- a chance for the appraisee to discuss any concerns or difficulties they may have with you
The benefits of a PDD are to:

- allow you as their manager/appraiser to acknowledge and give recognition for their achievements
- enable you both to discuss what they have achieved against any previously agreed objectives
- allow you as their manager/appraiser to discuss any future work opportunities
- enable you both to identify strengths, these could then be built upon to improve opportunities for the future
- allow you both to identify, agree and plan training and development needs
- to plan how to address difficulties and problems that the appraisee may have raised

How to prepare for a PDD

Appraisers should:

- agree a meeting date and time with the appraisee, giving as much notice as possible to allow for preparation. A minimum of two weeks’ notice is reasonable. Agree a timeline for delivery of the PDD form.
- book a room for the meeting and ensure there will be no interruptions
- schedule at least 90 minutes for each PDD
- review documentation supplied by the appraisee prior to the meeting (along with other material as relevant, from the Head), including their previously agreed objectives, achievements and any training and development they have completed and whether this has had an impact on their performance.
- consider any further additional activities they have undertaken
- anticipate information which the appraisee may require or questions which may be raised
- review their Performance Development Discussion form
- focus on key areas for discussion and potential questions which may be raised
You may need to refer to the following:
• previous appraisal record
• appraisee’s job description
• appraisee’s training record

Consider how you will behave during the discussion:
• ensure you make the appraisee feel at ease
• listen actively
• don’t interrupt
• consider the appraisee’s point of view
• ask open questions which require detailed answers
• don’t do all the talking – remember it is a two-way discussion
• don’t be afraid of silence
• probe for facts and specific examples rather than opinions or views
• give praise where it is due for specific work

Preparation
Remember: To get the most out of the PDD you should put time aside to reflect back on what the appraisee has achieved and focus forward on what you would like them to achieve. Thorough preparation will enable you as their manager/appraiser and the appraisee to have a really useful discussion.

Content of the PDD
As a manager/appraiser you may wish to use the following suggested agenda:

Performance-focussing on the past
Reflect on their achievements:
• how the appraisee achieved things and the challenges they faced and had to overcome
• how they have performed against any previously set objectives
• review of the training and development undertaken during the period under review, what have been the benefits to the appraisee and what have they done differently as a result
Feedback
Provide and receive feedback:

- give the appraisee the opportunity to review and feedback on their own performance
- review any feedback gathered by the appraisee and then give your feedback on their performance against any previous objectives

Feedback should be constructive, about something that the appraisee has done well, or about something that could be improved/done differently. It should be specific and factual. All feedback whether it is positive or negative must be:
  - factual
  - specific
  - honest
  - supportive

Development-focussing on the future
Agree objectives for the next period. These should be **SMART**:

- Specific
- Measurable
- Achievable
- Relevant
- Timebound (with a timeframe)

Consider the appraisee’s workload when agreeing objectives and discuss this with them. Typically, you should aim for them to have four to six key priorities and a plan of how to achieve them. You, as their manager/appraiser, will need to ensure that they fit in with the departmental objectives you have in place, and in turn link to the University Strategy.

Training and development
Consider all types of relevant training and development activity that will:

- help the appraisee with their current role
- help them achieve their objectives
- help them progress in their career

Remember this could be classroom training or e-learning, it could also be coaching or even buddyng up with someone to understand their role at the University.
Documentation
During the discussion remember to keep making notes about what you talk about and clarify what you as the manager/appraiser have agreed with the appraisee at the end of the meeting. You should also allow time and encourage the appraisee to start to complete the PDD documentation during the discussion.

After the discussion

- the appraisee will need to complete the PDD form. It should reflect the discussion you both had. You need to ensure they have signed the form and sent it through to you within two weeks of the PDD taking place.
- you will then need to review it, add your comments, sign it and send it through to the Head of Department within two weeks.
- the Head of Department will also add comments and sign it, and then return it to you within two weeks.
- you should keep the original document and send a copy through to the appraisee for their own personal records. If they use a computer this may be an electronic copy, if not a paper copy.
- they should keep this record in a safe place. You will need to review their objectives at their next Performance Development Discussion, or earlier at any 1:1 meetings that you have scheduled.
- ensure you send the final document to the departmental secure area.