



Performance Development Reviews

Introduction

PDRs are a great opportunity to reflect on achievements, focus on personal development, and discuss career aspirations. Jesus College runs an annual PDR cycle, supported by a mid-year review to monitor progress, and regular one-to-ones between a line manager and individual team members.

The performance year is aligned to the financial year, running from 1st August to 31st July.

PDR cycle




1. Annual expectation setting
2. Regular one-to-ones
3. Performance review



College Values

How we behave at work is just as important as the work itself. The PDR process also offers the opportunity to consider how our behaviours reflect and align with the College Values.

Our Values are:

 COMMUNITY	We are friendly and engaged in College life. We demonstrably promote access, embrace diversity and drive inclusion.
 EXCELLENCE	We strive for excellence in everything we do.
 CUSTODIANSHIP	Building a College that future generations can be proud of.



The Behavioural Framework – that sets out the College’s expectations of what this looks like in practice – can be found in Appendix A.

Supporting material

A range of material will be available to support you throughout the PDR cycle. This will include:

- Behavioural Framework
- PDR Toolkit
- Training
 - Goal Setting
 - Appraisal Skills
 - CintraHR



Performance Development Review (PDR) Policy

1. Purpose

- 1.1. The purpose of this policy is to establish a structured framework for performance development reviews that support employees' growth, align individual contributions with the College's goals and Values, and foster a culture of continuous improvement.

2. Scope

- 2.1. This policy applies to all members of the Support Staff community - Grades 2 to 10 - employed on a permanent or fixed-term basis, who have successfully completed their probation period.
- 2.2. For those members of staff who are still within their probation period, the Probation Policy applies.
- 2.3. This policy does not apply to casual or agency workers.

3. Policy Statement

- 3.1. The College is committed to the professional development and success of its employees. The **Performance Development Review (PDR)** process is designed to set meaningful goals, provide constructive feedback, identify opportunities for growth and skill enhancement, and embed the College Values in everything we do. It is a collaborative effort between employees and managers, fostering transparent communication and mutual understanding.

4. Objectives of the PDR process

- 4.1. Align individual performance goals with the College's strategic goals and departmental priorities;
- 4.2. Set clear expectations for standards or performance and behaviours in line with the College's Values;
- 4.3. Ensure employees receive regular, structured feedback on their performance;
- 4.4. Identify professional development opportunities and training needs;
- 4.5. Encourage open dialogue between employees and their line manager;
- 4.6. Recognise achievements while addressing areas for improvement.

5. Process overview

- 5.1. **Setting expectations:** At the beginning of each performance year, and in discussion with their line manager, expectations for what will be delivered, when, and how will be set by for individual members of staff. This will look different for each role in the College, and may be recorded as objectives, departmental goals, team priorities, service standards, competencies, or key performance indicators.
- 5.2. **Values in action:** Individuals' commitment to each of the College Values will also be discussed and recorded, with reference made to the Behavioural Framework (see Appendix A) that sets out the College's expectations for each one.
- 5.3. **Development planning:** A development plan will be identified at the beginning of the year to ensure each member of staff has the right skills, level of competence, and knowledge needed to carry out their role effectively over the forthcoming year and beyond.
- 5.4. **Frequency of review:** Performance development reviews will be conducted on an annual basis, with an interim review carried out at the mid-year point to ensure continuous engagement and progress monitoring.
- 5.5. **Evaluation criteria:** Employees will be assessed based on their performance against the expectations set at the beginning of the year, as well as how they have carried out their role in line with the College Values and Behavioural Framework.



- 5.6. **Regular one-to-ones:** Once expectations have been set, regular one-to-ones should be held between line managers and their team members throughout the year. These meetings allow dedicated time reserved for employees to get what they need from their manager in order to do their job well. One-to-ones may cover both work and non-work related issues, including an individual's wellbeing.
- 5.7. **Employee participation:** Staff are encouraged to actively participate in the review process, and should undertake thoughtful preparation for these discussions by reflecting on their achievements, identifying challenges, and proposing development goals. A self-assessment needs to be completed from all employees ahead of the line manager's appraisal and formal PDR meeting.
- 5.8. **Manager's role:** Managers should also prepare appropriately for these discussions. They are responsible for setting realistic expectations, providing constructive feedback, and supporting employees in their role and personal development. They may wish to seek feedback about their team members from colleagues in other areas of the College in order to provide a full assessment. Line managers should also consider the actions they may also need to pick up to help enable their team members to deliver their goals and objectives.
- 5.9. **Performance ratings:** At the annual PDR meeting, employees should indicate how they believe they have performed by providing a personal performance rating. This will be discussed with their line manager during the PDR meeting. The line manager will give a final performance rating at the end of the process.
- 5.10. **Follow-up actions:** Both parties should agree to support the outcomes as agreed. Line managers may also wish to assess the individual's potential. Actionable outcomes will be documented, and necessary support - including training or development - will be provided to facilitate growth.
- 5.11. **Upward feedback for managers:** Line managers may wish to seek feedback from their team members on how they are managing and leading the team. As well as identifying line manager actions to support and enable an individual's success, line managers may wish to pose specific questions to structure the feedback they are given. This is an optional part of the process, with example questions provided within the toolkit.
- 5.12. **Inclusivity:** All aspects of the PDR process should be conducted in an inclusive and respectful manner that supports fair opportunities for development across all roles and backgrounds.



6. PDR timeline

6.1. The PDR cycle should align to the following timeline:

Stage of process	What is required	Timing
Setting expectations (beginning of the year)	Goals should be set at the beginning of the performance year. Managers should meet with individual team members to discuss priorities and agree what tasks will be completed over the next 12-month period.	Throughout August. This discussion may be held at the same time as the end-of-year performance development review. Goals should be set and submitted by mid-September.
Regular one-to-ones (ongoing)	One-to-ones should be held regularly between an individual and their line manager at appropriate intervals depending on their role.	e.g. Monthly
Performance development review (mid-year)	Managers should meet with individual team members to review performance over the first half of the year, and discuss progress against expectations set, including the College Values and behaviours. Team members should complete their self-assessment in advance of the PDR meeting. Adjustments to objectives / expectations should be made where required.	Throughout February. Forms to be completed and submitted by mid-March.
Performance development review (end-of-year)	Managers should meet with individual team members to review performance over the past 12 months, and review progress against goals set at the beginning of the year. Personal and manager performance ratings should be discussed and a final rating given. Team members should complete their self-assessment in advance of the PDR meeting.	Throughout August. Completed forms, including both manager and employee comments and final performance ratings, to be submitted by mid-September.



7. Performance ratings

7.1. Five ratings will be available in order to evaluate and manage performance effectively. These are:

- **Exceeding expectations**
- **Performing well**
- **Meeting expectations**
- **Opportunity to improve**
- **Not performing**

7.2. These ratings will be used for both the individual self-assessment and the line manager's rating.

7.3. Line managers should consider how high performing individuals are nurtured and encouraged so that their achievements don't go unnoticed.

7.4. In the event of a disagreement between a line manager and their team member on the performance rating, both parties should engage in a respectful, evidence-based discussion to explore the reasons behind the differing perspectives. Support from HR or an appropriate third party can be sought if needed. The final outcome should be fair, transparent, and aligned with performance criteria.

7.5. Where an individual is not meeting the expected standards of performance, an appropriate development plan or Performance Action Plan should be put in place. Line managers should contact HR to discuss next steps.

8. Managing performance

8.1. The outcome of the formal meetings should not be a surprise to the employee, and discussions about an individual's performance should be clearly documented.

8.2. If an individual is performing exceptionally well, positive feedback should be timely and not left until the end of the year. Positive feedback should also be reinforced in the formal meeting and formally recorded.

8.3. Managers may wish to recognise those who have gone above and beyond through one of the College's recognition schemes.

8.4. Similarly, any concerns about an individual's performance should be addressed as they arise, ideally through the regularly scheduled one-to-one meetings. Line managers should ensure any performance-related discussions – including any concerns about an individual's performance or development – are clearly documented to support the performance management process.

8.5. If an individual's performance, at any time during the year, falls below an acceptable standard, this should be addressed as soon as possible. Line managers may wish to discuss their concerns with HR to identify whether a formal performance management process needs to be put in place.

9. Confidentiality and Fairness

9.1. All performance development reviews must be conducted fairly and objectively, ensuring confidentiality of personal evaluations and discussions.

10. Policy Review

10.1. This policy will be reviewed regularly to ensure its effectiveness and relevance. Changes may be implemented as necessary to align with organizational needs and best practices.

Jesus College Values and Behavioural Framework

Community We are friendly and engaged in College life. We demonstrably promote access, embrace diversity and drive inclusion.	Excellence We strive for excellence in everything we do.	Custodianship Building a College that future generations can be proud of.
Everyone		
<ul style="list-style-type: none"> • Be friendly – say hello and be kind • Treat everyone as individuals and acknowledge difference • Break down silos – share information across departments and seek common ground • Be respectful of each other through all your interactions, including tone • Demonstrate that you value the contribution made by others • Collaborate to find solutions – avoid blame and believe the best in each other • Recognise the value of face-to-face interactions to make progress and resolve problems • Respect boundaries of knowledge and responsibilities of other teams 	<ul style="list-style-type: none"> • Always do your best • Deliver what you commit to – take responsibility and be accountable • Look for solutions, be positive and helpful • Lift the team's performance up – encourage others and recognise success • Provide constructive feedback and be open to receiving feedback • Share the success of others • Demonstrate empathy 	<ul style="list-style-type: none"> • Demonstrate awareness and care for the College environment, buildings, and reputation • Uphold the best of our traditions and take pride in the history we are making • Participate actively in College life • Unite across teams and departments behind our shared purpose, and take our collective responsibilities seriously • Embrace opportunities to learn from past experiences • Identify sustainable solutions, not just quick fixes
Managers		
<ul style="list-style-type: none"> • Champion inclusion • Show humility • Be available and accessible • Resolve conflict with fairness • Demonstrate shared responsibility • Communicate clearly, and explain why as well as why not • Listen to others, especially those who might not normally speak up 	<ul style="list-style-type: none"> • Lead by example • Take ownership and be accountable • Show humility • Provide and support opportunities for growth • Encourage creativity and empower others • Recognise effort as well as achievements • Embrace failure as an opportunity to learn 	<ul style="list-style-type: none"> • Champion sustainability • Lead and collaborate for the whole organisation, not just your own team • Lead for the future College and not just today's College • Help your team to understand their contribution to the whole