

**This template should initially be filled in by the individual and then be updated following discussions with the line manager**

PERFORMANCE AND DEVELOPMENT REVIEW				
Name		Payroll Number		Job Title
Line Manager		Year		Date of start of year PDR

**SECTION 1 – GOALS (SMART)**

The start of the year is the opportunity to discuss expectations and agree goals for the coming year. It is very much a two-way process, with colleagues drafting their proposals before the PDR meeting, and the line manager reviewing as part of their meeting preparation. Further information to help you complete the form is available via the following [link](#)

GOAL 1 (max 5)	
<b>Be specific - What</b> do I need to achieve (link to strategy/ service /team goals)	
<b>Measurable - WHAT</b> actions will I take to deliver my goal? What will successful performance look like? (Detail key milestones)	
<b>Achievable – What</b> will help me achieve my goal (what support is needed)	
<b>Relevant /realistic</b> (refer to team / service goal / personal /professional goal)	
<b>Timebound - due by:</b>	
<b>Goal status - MID YEAR REVIEW: What is the status of this goal? Review and reset goals (if needed) and discuss and agree with the line manager</b>	<b>Date</b>
<b>Goal status - END OF YEAR: SUMMARY of performance – did I achieve my goal? Discuss and agree with your manager.</b>	<b>Date</b>

<b>GOAL 2 (max 5)</b>	
<b>Be specific - What</b> do I need to achieve (link to strategy/ service /team goals)	
<b>Measurable - WHAT</b> actions will I take to deliver my goal? What will successful performance look like? (Detail key milestones)	
<b>Achievable – What</b> will help me achieve my goal (what support is needed)	
<b>Relevant /realistic</b> (refer to team / service goal / personal /professional goal)	
<b>Timebound - due by:</b>	
<b>Goal status - MID YEAR REVIEW: What is the status of this goal? Review and reset goals (if needed) and discuss and agree with the line manager</b>	
	<b>Date</b>
<b>Goal Status - END OF YEAR: SUMMARY of performance – did I achieve my goal? Discuss and agree with your manager.</b>	
	<b>Date</b>
<b>GOAL 3 (max 5)</b>	
<b>Be specific - What</b> do I need to achieve (link to strategy/ service /team goals)	
<b>Measurable - WHAT</b> actions will I take to deliver my goal? What will successful performance look like? (Detail key milestones)	
<b>Achievable – What</b> will help me achieve my goal (what support is needed)	

PDR template

Line Manager – Grade 13 and below

<b>Relevant /realistic</b> (refer to team / service goal / personal /professional goal)	
<b>Timebound</b> - due by:	
<b>Goal status - MID YEAR REVIEW: What is the status of this goal? Review and reset goals (if needed) and discuss and agree with the line manager</b>	<b>Date</b>
<b>Goal status - END OF YEAR: SUMMARY of performance – did I achieve my goal? Discuss and agree with your manager.</b>	<b>Date</b>
<b>GOAL 4 (max 5)</b>	
<b>Be specific - What</b> do I need to achieve (link to strategy/ service /team goals)	
<b>Measurable - WHAT</b> actions will I take to deliver my goal? What will successful performance look like? (Detail key milestones)	
<b>Achievable – What</b> will help me achieve my goal (what support is needed)	
<b>Relevant /realistic</b> (refer to team / service goal / personal /professional goal)	
<b>Timebound</b> - due by:	
<b>Goal status - MID YEAR REVIEW: What is the status of this goal? Review and reset goals (if needed) and discuss and agree with the line manager</b>	<b>Date</b>
<b>Goal status - END OF YEAR: SUMMARY of performance – did I achieve my goal? Discuss and agree with your manager.</b>	<b>Date</b>

PDR template

Line Manager – Grade 13 and below

<b>GOAL 5 (max 5)</b>	
<b>Be specific - What</b> do I need to achieve (link to strategy/ service /team goals)	
<b>Measurable - WHAT</b> actions will I take to deliver my goal? What will successful performance look like? (Detail key milestones)	
<b>Achievable – What</b> will help me achieve my goal (what support is needed)	
<b>Relevant /realistic</b> (refer to team / service goal / personal /professional goal)	
<b>Timebound – due by:</b>	
<b>Goal status - MID YEAR REVIEW: What is the status of this goal? Review and reset goals (if needed) and discuss and agree with the line manager</b>	<b>Date</b>
<b>Goal status - END OF YEAR: SUMMARY of performance – did I achieve my goal? Discuss and agree with your manager.</b>	<b>Date</b>

## SECTION 2 – COMPETENCY FRAMEWORK

### HOW will I deliver my goals?

The [competency framework](#) describes which behaviours are required, valued, and recognised within the Council. It identifies 3 behaviours - **Delivering results**, **Leading and working through others** and **Shaping the future** with nine competencies aligned to these behaviours.

Select one competency from each of the 3 behaviours to focus on for the year.

Behaviours	1) Delivering results	2) Leading and working through others	3) Shaping the future
<b>Competencies</b>	Resident and outcome focused	Collaborative leadership	Strategic perspective
	Delivering high performance	Influencing and engaging across our networks	Intelligent decision making
	Learning through delivery	Politically astute	Changing and improving

Refer to **Competency Framework - Lead and Manage Others** for description of behaviours and competencies, including detail of 'below', 'meets' and 'exceeds' expectations

<b>1) Behaviour – Delivering Results</b>	
Select one of competency. Consider your strengths? What are your development priorities? What can help you deliver your goal?	
<b>Which competency?</b> (Resident and outcome focused, Delivering high performance and Learning through delivery)	
How will you demonstrate this competency?	
<b>Mid-Year Review</b>	
<b>END OF YEAR: SUMMARY</b> How have you used this competency to deliver?	

<b>2) Behaviour – Leading and working through others</b>
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Select one of competency. Consider your strengths? What are your development priorities? What can help you deliver your goal?	
<b>Which competency?</b> (Collaborative leadership, Influencing and engaging across our networks or politically astute)	
How will you demonstrate this competency?	
Mid -Year review:	
<b>END OF YEAR: SUMMARY</b> How have you used this competency to deliver?	

<b>3) Behaviour – Shaping the future</b>	
Select one of competency. Consider your strengths? What are your development priorities? What can help you deliver your goal?	
<b>Which competency?</b> (Strategic perspective, Intelligent decision making or Changing and Improving)	
How will you demonstrate this competency?	
Mid-Year review	
<b>END OF YEAR: SUMMARY</b> How have you used this competency to deliver?	

### SECTION 3 - CAREER ASPIRATIONS

This section covers discussions with your line managers about short and long-term career aspirations.

<b>What would you like to achieve in your career in next 12-18 months?</b>		
<b>Discuss and agree with your manager what you would like from your career longer- term here</b>		
<b>Aspirations</b>		<b>Please tick one of options</b>
	Develop in current role	
	Aspiring to change role/direction	
	Develop to higher grade in 12-18 months	
	Develop to a higher grade in 18 months -3 years	

### SECTION 4 PERSONAL DEVELOPMENT

This section should be used as a live document. The individual should progress actions, actively review and share progress with their Line Manager. Refer to the [Development Discussions Guide](#) for further information

<b>Development Priority</b> What is the development need?	<b>Development Activity</b> How are you going to develop in this area?	<b>Support</b> What support is required and by whom?	<b>Success criteria</b> How will you know you have achieved this?	<b>Target Date</b>	<b>Status</b> (no started/ in progress / complete)



### SECTION 5 – FEEDBACK

It's important to gather feedback throughout the year, which is often based around our behaviours, HOW we work. Feedback is an important part of development. Feedback is also useful for the end of year review and provides additional information to support the discussion. Refer to our [Manager's Guide to Feedback](#) for further information.

<b>Feedback from key stakeholders</b>		
<b>What do you see me as doing when I am at my best?</b>		
Date	Who	Feedback
<b>What do you believe could be my 'Achilles heel' (that could prevent me from reaching my potential?)</b>		
Date	Who	Feedback
<b>Summary of what I will do differently because of this feedback</b>		

### **SECTION 6 - MID YEAR REVIEW**

You have taken stock of progress made towards goals and have considered any realignments in Section 1.  
For example, maybe a goal has been completed so another could be added, or the direction of a goal has been changed.

Please provide summary comments now that goals, competencies, career aspirations and development activities and feedback have been discussed and agreed with line manager.

### SECTION 7- END OF YEAR REVIEW

The purpose of the end of year review is to consider all sections of the PDR and reflect on your performance throughout the year including review of goals, competencies, career aspirations, personal development plan and feedback from others. This section should provide you with the opportunity to create an overall summary of how you feel the year went.

<b>END OF YEAR REVIEW SUMMARY</b>		
	<b>Comments</b>	<b>Date</b>
<b>My summary</b>		
<b>Line Manager's summary</b>		

Copy of the form to be stored in HR Files (EDRM) and be used as a working document throughout the PDR year.