

**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  
 Non line manager PDR users

<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>

<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 - 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 3 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 4 – 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 5 - 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 6- 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.