



KEY STEPS IN THE PERFORMANCE & DEVELOPMENT REVIEW (PDRS) PROCESS

[PDRS Policy](#)

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HR launches the annual cycle of reviews via communication with Heads.

1	<p>Clarification of Exemptions</p>	<ul style="list-style-type: none"> • There are a number of exemptions in the application of this policy: <i>local discretion applies</i> <ul style="list-style-type: none"> ○ Staff with less than a 0.5 FTE (less than 50% of a post) ○ Staff with less than a year left on a contract or those who are currently in a Probation/ Probation & Establishment process ○ Staff on long term sick leave ○ Staff on statutory leave or sabbatical leave ○ Staff within one-two years of retirement (exemption only applies to Reviewee status)
2	<p>Clarification of Reviewer- Reviewee Relationships</p> <p><i>Head</i></p>	<ul style="list-style-type: none"> • Do you know who your Reviewer is? Who will be reviewing who in my area? Mapping the reporting lines for PDRS is important first step. Reviews normally follow the reporting line or natural chain of seniority e.g. the School/ Area Manager reviews more junior colleagues, Head of College reviews Head of School. The Reviewer is someone with oversight of the colleagues work. • The Head can nominate another reviewer to assist in the conducting of reviews. This is someone who would naturally be seen in the reviewer role. Sign off authority of budget, allocation of resources etc remains with the Head.
3	<p>Head Briefing to Staff</p> <p><i>Head</i></p>	<ul style="list-style-type: none"> • A marker for a positive experience in PDRS is guidance from the Head on areas of importance for the area. This can provide context for staff to reflect on during preparation of Part 1 of the PDRS Pre-Meeting submission. • The Head reminds staff of the three options for the PDRS meeting (<i>as set out in 4 below</i>) • The Head agrees with staff the most appropriate period in which to conduct reviews within the University's cycle of reviews.
4	<p>Choose one of three Review Options</p>	<ul style="list-style-type: none"> • The PDRS policy allows for three options for the review. The choice lies with the reviewee. <ul style="list-style-type: none"> ○ Option 1: One-to-One between Reviewer and Reviewee ○ Option 2: Inclusion of a colleague for the area in a neutral capacity – mutually agreed. The review is still between Reviewer and Reviewee. The colleague provides context. ○ Option 3: Peer Committee comprising of Reviewer, Reviewee, a colleague sitting in and a colleague from elsewhere in the University of the same staff category and grade. When chosen the Head contacts HR who hold the trained panel. • Choice is reflective of reviewee need and level of stretch looking for. The Peer Committee acts as a default where there is no agreed sign off out of the review meeting. Paperwork is confidential between Reviewer and Reviewee – colleague and Peer Committee member do not have access prior to the meeting.
5	<p>Book your PDR meeting via the e-performance platform and complete Part 1 (Pre-Meeting Reflection)</p>	<ul style="list-style-type: none"> • Log onto the e-performance platform via SSO (using your UCC login details) Login UCC PDRS(simitive.com) • Book your meeting. The system will email your reviewer UCC email and also log it as an action in the system. • Fill in the current cycle's Review Form – Part 1 – Pre: Meeting. And submit at least one week in advance of PDR Meeting. • The Reviewer can come back to the Reviewee prior to the meeting to clarify the content for the meeting – mutual agreement.
6	<p>PDR Meeting</p>	<ul style="list-style-type: none"> • Refer to Guidance on PDR Meeting - virtual meetings • Operates on a Principle of No Surprises • Expect the meeting to last 45 minutes to 1 hour • Meeting covers discussion of reviewee's Part, feedback on performance and agreed focus going forward • Fill in Part 2 (mutual agreement) which is the Record of the meeting – sign and return within 5 working days. • Where non-agreement – reconvene meeting after one week – if no agreement – default to Peer Committee.
7	<p>PDR Reporting</p>	<ul style="list-style-type: none"> • Complete Non- Personalised Summary Report Template, and return to your Head – which rolls up to a non-personalised report of each sub-unit to the Head of College/ Head of Service who in turn returns to the President's Office. • Prioritised training needs returned to HR which will enable HR follow up.