

Leadership Information Pack

Revised Performance Development Review Forms

(PDR)

2025-2026

Revised Performance Development Review

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1. Introduction

Following discussion at our Leadership Forums in 2024 and feedback received from line managers, we have revised the Performance Development Review (PDR) form with an aim to simplify the process for both individuals and managers.

We have also produced a Group PDR form, following feedback from our Leadership Forum discussions. Section 2 below provides details of how and when to use this group approach.

At our Leadership Forum events last year we also shared that we are replacing our iTrent HR and Payroll system over the coming year with the new Oracle Fusion HCM system.

There will be further developments of the PDR process in 2026/27, once the new HR and Payroll system is live and as we roll out new features, and details of that will be shared as they are developed.

2. Background to the PDR process at the Council

Whilst regular meetings are taking place between employees and managers in relation to objectives and performance, the formal recording of Performance Development Reviews (PDRs) on iTrent across many service areas is low.

Feedback received, and specifically discussions at our Leadership Forums last year, highlighted that the PDR paperwork was lengthy, time consuming, and not always relevant, particularly for larger teams.

We have therefore developed streamlined forms to capture performance and development information, but in a simplified way, which will be easier for both managers and employees to complete during PDR discussions.

The individual form is attached at Appendix 1 and the group form at Appendix 2.

2.1 HGIOS and BIPs informing the PDR Process

Our PDR process here in East Dunbartonshire flows from the Council's Local Outcome Improvement Plan (LOIP) which outlines the strategic priorities for the Council and

Community Planning Partners, the Business & Improvement Plans which outline the strategic priorities for each Executive Officer's strategic portfolio for each year, the Team Plans for service areas within each BIP and the Council's HGIOS Performance Reporting which details the achievements and focus for each strategic portfolio.

Our year-end 'How Good is our Service' (HGIOS) reports for 2024/25 have been prepared and are in the process of being considered by the current round of Committees (Place, Neighbourhood & Corporate Assets on 8 May; Education on 15 May; and Policy & Resources on 22 May). Executive Officers are also preparing Business & Improvement Plans (BIPs) with their Management Teams, which will be presented to Council in June.

Our BIPs inform our Team Plans for the year ahead and having prioritised our team objectives from our finalised BIPs, these Team Plans should inform our PDR conversations and individual objective setting.

With the publication of our 2024/25 HGIOS Reports and the development of our BIPS, it is therefore the appropriate time to be carrying out PDR conversations with our teams to close off objectives and achievements from 2024/25 and to look ahead to priorities and objective setting for 2025/26.

2.2 PDR Principles

The longstanding Council PDR principles continue, and these include:

- Transparent and effective lines of communication between line manager and employee
- Aligning PDR conversations to HGIOS reporting, Business Improvement Planning and Team Plans
- Ensuring that objectives are relevant, meaningful and have appropriate timescales
- Ensuring that skills development and training requirements are considered to support employees in carrying out their roles.

The new paperwork is simplified and includes a section looking back at the previous year for recording performance and achievements, followed by a section looking forward to the coming year aligned to Team Plans and BIPs. The looking forward section includes the opportunity to capture objectives in relation to the whole team and also individual objectives (see Appendix 1).

2.3 Group PDR Form

As advised in the introduction, and following feedback from our Leadership Forum, we have also developed a Group PDR form that can be used to carry out group PDRs for teams where there are several employees undertaking the same role and with the same line manager.

ALL employees that have had a group PDR for their role should have the opportunity to also have an individual PDR if they or their line manager feel this is appropriate.

This Group PDR form is attached at Appendix 2 and includes an opportunity to record collective group objectives as well as recording whether any of the group members would

also like an individual PDR in which case the form at Appendix 1 should also be completed (with the team objectives being transferred over from the group form).

2.4 Leadership Competencies

As part of this interim arrangement for PDRs, the leadership competencies have been removed from the PDR paperwork for 2025. This will enable us to review and refresh these as part of the further PDR development that will follow once the new HR and Payroll system has been implemented.

The revised forms for 2025 will be published on the Employee Zone this week and are also attached at Appendix 1 and Appendix 2 at the end of this Leadership Information Pack.

3. Next Steps and Actions

All line managers, if not yet done so, should now schedule and conduct PDR conversations with their team members and ensure these conversations are recorded on the new 2025 forms.

If managers have already begun this process using the old paperwork, this can still be uploaded to iTrent. However, going forward, the new simplified forms should be used and uploaded.

We offer PDR training for line managers, anyone who would like to book onto “Conducting Meaningful PDRs” training should email peopledevelopment@eastdunbarton.gov.uk and this can be arranged.

Once PDRs have been completed the line manager should log this on iTrent so that completed PDRs can be reported in line with corporate performance indicators.

Please note, that as indicated above, if you are completing a group PDR form for one of your teams, that should be recorded on each individual team member’s iTrent record so that the PDR performance indicator truly reflects the number of PDRs that have been carried out.

Please see the iTrent guide below of how to attach a PDR to iTrent.



Attaching PDRs to
iTrent.docx

4. Summary

In summary, please can all line managers now schedule and carry out PDR conversations for 2025/26 and upload the paperwork to iTrent.

Any queries in relation to the updated form and process, please email HR Business Partners at businesspartnerteam@eastdunbarton.gov.uk

Thank you in advance for your efforts to carry out PDRs for your team for 2025/26 with this updated approach.

Thank you

Angela

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Appendices

Appendix 1



PDR Review
Individual Paperwork

Appendix 2



PDR Review GROUP
paperwork 2025.docx