

Performance and Development Review Framework Guidance Pack

for Manager's, Team Leader's & Employees

October 2025

This guidance may be updated following implementation, review, evaluation and feedback of the PDR Framework

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1. INTRODUCTION

Following discussion at our Leadership Forum 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 3.3 provides details of how and when to use this group approach.

At our Leadership Forum events 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. ROLES & RESPONSIBILITIES

Everyone has a key role to play and responsibilities in ensuring the PDR process is as effective as possible not just for the employee and manager, but for the Council too. These are highlighted below:

Managers & Team Leaders

Ensure that a transparent, consistent and objective process is implemented for supporting and addressing Performance at Work

Complete the process without unreasonable delay

Maintain clear lines of communication throughout the process

Employees

To gather evidence to support the PDR Framework on an ongoing basis

To participate in the PDR process to ensure that agreement is reached wherever possible

To demonstrate a positive attitude to working relationships and to work to achieve potential

Engage in open and honest communication

Trades Unions

To support and advise members on the application of the PDR Framework

To accompany members at appropriate stages of the process

To participate in the review of the PDR Framework as appropriate

3. BACKGROUND TO THE PDR PROCESS AT THE COUNCIL

Our Vision for East Dunbartonshire

"Working together to achieve the best with the people of East Dunbartonshire"

Underpinning our Vision is our shared values, these are:

We value

- Excellence
- Partnership
- Our Employees
- Customers
- Innovation

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.

3.1 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 (BIPs) 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 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.

3.2 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).

3.3 Group PDR Form

The Group PDR form can be used to carry out group PDRs for teams where there are several employees undertaking the same role, with the same objectives, 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).

3.4 Competencies

A 'Competency' can be defined as:

“a skill, ability, knowledge or behavioural characteristic that is associated with performance”.

In relation to a job role, a competency is a skill, ability, knowledge or behavioural characteristic that is required to be able to perform within that job role. To be competent within a role is the ability to perform a specific task, action or function that is essential to the performance of the job successfully”.

Competencies will vary across the variety of roles within the council, but there should be a clear link to the areas of the role found within the Role Profile or East Dunbartonshire Shared Values.

As part of this interim arrangement for PDRs, the leadership competencies have been removed from the PDR paperwork. 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.

4. THE REVIEW PROCESS

The Performance Management process involves a course of meetings between an employee and their line manager which will result in the setting of objectives and the identification of development needs that impact on the performance of the organisation and the employee within their role.

As a minimum, Manager's and Team Leaders should agree the individual objectives, review performance against agreed objectives at an interim period with the final outcome and formal paperwork completed annually.

Performance Management is an ongoing process aimed to ensure that the employee has the necessary skills, knowledge and behaviours to ensure effective performance in their role. This should not be a one off event each year but a combination of meetings and communication throughout the year which gives a clear indication of the objectives set and progress towards achieving these.

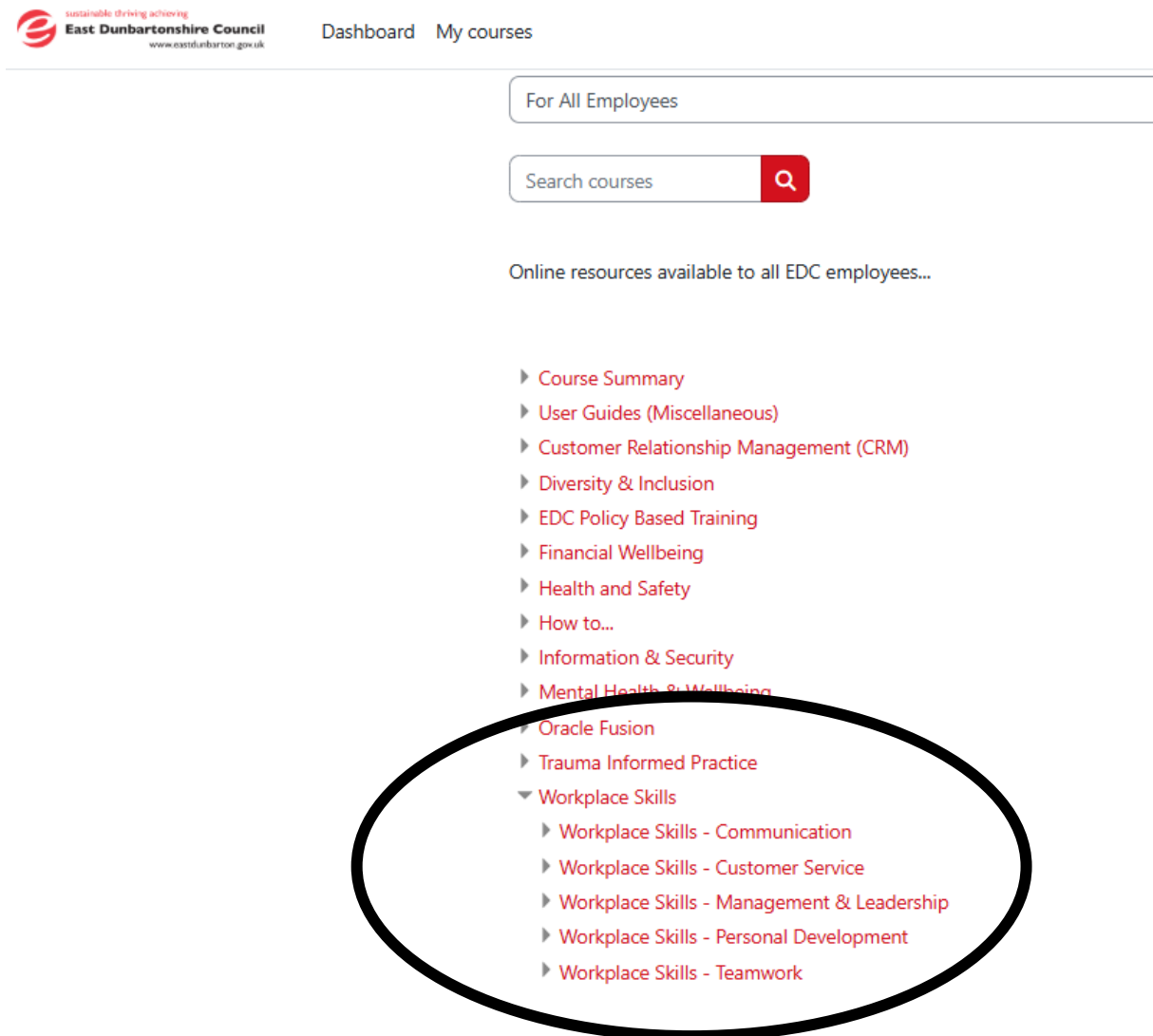
5. SUPPORT ON EDC MOODLE LEARNING HUB

Remember too that on the EDC Moodle Learning Hub there are a range of resources available to support the PDR process, both as the manager and the employee.

Within the Workplace Skills heading, there are 5 further categories, with potentially useful courses for example...

- Communication
- Asking the right questions
- Active Listening
- Motivation & Effective Feedback
- Giving & Receiving Feedback
- Setting Objectives
- Planning your own development

EDC Moodle Course Directory:



6. 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 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.

7. MANAGERS AND TEAM LEADER GUIDANCE

This section is designed to provide managers and team leaders with some helpful hints, tips and guidance on various aspects within the PDR Framework.

Hints and Tips for the PDR Framework	
Do 	Don't 
<ul style="list-style-type: none">• Prepare for meeting the employee• Be open & honest• Tell the employee why you are meeting• Review objectives and make adjustments if necessary• Keep to the agreed meeting time• Use & complete the agreed paperwork• Give the employee a chance to improve by having your 6 monthly meeting• Take account of all evidence, including new evidence raised at the meeting,• Take an objective view when scoring	<ul style="list-style-type: none">• Rush and leave preparation to the last minute• Have your own agenda• Have a meeting with no point to it• Overlook requests for training or adjustments to objectives• Cancel or postpone if not essential• Create your own or complete paperwork in isolation• Leave performance issues to be discussed at the annual PDR meeting• Overlook new information presented and deal with this in an objective and professional manner

7.1 OBJECTIVE SETTING

Managers and Team Leaders should set individual objectives for their employees that are in line with the role, the service and Council needs.

All individual objectives should be 'SMART', to ensure simple and straightforward identification of achievement or not.

Writing Objectives
What is a SMART objective?
<p>All objectives written should be SMART</p> <p>Specific: They describe a specific outcome</p> <p>Measurable: They are linked to a rate, number, percentage or frequency</p> <p>Achievable: with a reasonable amount of effort, they can actually be achieved</p> <p>Relevant: The people involved have the necessary knowledge, authority and skill</p> <p>Time based: they include clearly defined finished and/or start dates</p> <p>SMART objectives should be written in advance of the PDR meeting and discussed and agreed with the employee.</p>

PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK

GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)

7.2 MEETING GUIDANCE

This section provides high level guidance on what managers/team leaders should be preparing and carrying out as part of the PDR Process.

Pre Meeting Guidance		
Pre meeting Action by Manager	Yes / No	Date
Arrange date, time and venue for meeting with employee		
Review paperwork from previous meetings		
Ensure employee has a copy of their current objectives		
Copies of team/service plan available for objective review / setting new objectives		
PDR Meeting Guidance		
The PDR meeting offers the opportunity to review the employee objectives which were set and to gather evidence from the employee in support of them meeting these.		
PDR Meeting Action by Manager	Yes / No	Date
Welcome employee to the meeting and thank them for coming		
Check employee has reviewed their objectives for previous review period		
Outline the format of the meeting		
Reflect on past period, under heading "Look Back"		
Ask employee to begin to outline their evidence supporting their objectives		
Use questions to expand on information and add detail		
Agree on the evidence supplied both from paperwork and new information through conversation and record under "What have you achieved?"		
If progress on objectives isn't satisfactory discuss and record the reasons for this under "What is still outstanding to be achieved?"		
Ask the employee if any support or training is needed		
Ask the employee if they would like to discuss anything in confidence		
Review objectives or set new objectives		
Are the objectives set SMART ?		
Ensuring agreement on these and timescales are clear for achieving these		
Agreement on the summary of the meeting should be recorded using the PDR Paperwork and should be signed by the Manager/Team Leader and the employee on agreement with reference to all of the supporting documentation.		

PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK



GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)

Summarise the procedure following the meeting including: <ul style="list-style-type: none"> • How you will process the information for the meeting • Follow up meetings agreed (date, time & location) • Reinforce support available 		
Thank the employee for their attendance and their hard work in achieving the objectives set		
Post PDR Meeting Guidance		
It is essential that follow up actions are carried out after meeting with the employee. There will be specific actions for both parties and it is essential that meetings are set up for the review cycle to begin again. It is the Manager/Team Leaders responsibility to ensure that all paperwork is completed and sent to their Head of Service within the relevant time scales.		
Action by Manager	Yes / No	Date
Check that all paperwork has been completed		
Give a copy of paperwork to the employee		
Complete PDR Paperwork and record outcomes		
Prepare and make arrangements for next meeting		
Confirm to employee the final PDR outcome		

PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)

8. EMPLOYEE GUIDANCE

This section is designed to provide employees with high level guidance on the PDR Process.

Hints and Tips for the PDR Framework Evidence	
Do 	Don't 
<ul style="list-style-type: none"> Record information on achievements throughout the year Give work examples where you have met all or part of an objective Manage your evidence in a practical way Record your evidence on the paper work provided 	<ul style="list-style-type: none"> Dismiss an achievement that seems irrelevant at the time, it may be important later Be vague in providing your evidence Bring unmanageable amounts of evidence Include actual pieces of work as evidence

Following the Process		
<p>Employees should use the PDR meeting as an opportunity to discuss work objectives with line managers. This should provide an opportunity to:</p> <ul style="list-style-type: none"> Give feedback on the progress in meeting objectives Discuss the opportunities available to you in your current role Discuss your expectations for the future Provide any feedback on ideas for improving the service delivered by your team To have a discussion around the objectives being set for the following year <p>The checklist below provides some key points that as an employee you may want to consider in the PDR process. The evidence you wish to provide should be noted on the PDR Review Form against the objectives set in the last meeting.</p>		
Action by employee	Yes / No	Date
Gathered evidence throughout the year		
All objectives have evidence of how I have met them		
For objectives I haven't met there are valid reasons for the objectives not being met		
My learning & development over the last year is clearly noted		
I am clear on the new objectives which have been set for me		
I feel that I have the skills and abilities to achieve my new objectives		
I have requested the appropriate support/development to meet my objectives		
<p>Important Note During PDR meetings it is the employees' responsibility to provide their manager with evidence to support the objectives being met and how they met them. From there the manager and employee should agree on which of the three ratings applies to that objective. For this reason, it is important that your evidence is clear, concise and relevant.</p>		

**PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK
GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)**

APPENDIX 1

Individual Performance Development Review		
Name	Job Title	
Service Area	Team:	
Review Period:	Initial: Y/N	End of Year: Y/N
Look back:		
What has gone well?		
What has gone not so well?		
What have you achieved?		
What is still outstanding to be achieved?		
Look forward:		
Team Objectives:		
Manager to share & discuss identified team objectives from LOIP/ BIP/ Team Plan		
How will you contribute towards the achievement of this/ these team objectives?		
Personal Objectives:		
What are your objectives/ plans for the next review period?		

**PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK
GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)**

How will you meet these?	
Are there any possible barriers/ restrictions that may impact your achievement of any of these objectives?	
What support, if any, might you need?	
Is there a need for any mandatory/ legislative training?	
Employee's comments	
Manager's comments	
Manager's Signature	Date
Employee Signature	Date

APPENDIX 2

Group Performance Development Review		
Service Area: Team Name: Team member names:		
Review Period:	Initial: Y/N	End of Year: Y/N
Look back:		
What has gone well?		
What has gone not so well?		
What have you achieved?		
What is still outstanding to be achieved?		

**PERFORMANCE & DEVELOPMENT REVIEW FRAMEWORK
GUIDANCE FOR MANAGER'S & TEAM LEADERS (1)**

Look forward:	
Team Objectives:	
Manager to share & discuss identified team objectives from LOIP/ BIP/ Team Plan	
How will you contribute towards the achievement of this/ these team objectives?	
Are there any possible barriers/ restrictions that may impact your achievement of any of these objectives?	
What support, if any, might you need?	
Is there a need for any mandatory/ legislative training?	
Manager's comments	
Name(s) of any team member requesting a 1-2-1 PDR	
Manager's Signature	Date