

PDR Guidance for People Managers

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Key messages

The main objective of this guidance is to provide:

- Guidance to people managers on completing a PDR with team members.

Does this guidance relate to me?

This guidance is aimed at all people managers.

Table of Contents

1. Introduction	2
2. The ICO PDR Process	2
3. Values	3
4. Before the PDR Discussion	3

5. During the PDR Discussion.....	4
6. After the PDR Discussion.....	6
Feedback on this document	6
Version history	6

1. Introduction

- 1.1 The Personal Development Review (PDR) is a tool to help you focus the efforts of your team, support development needs and recognise achievements.
- 1.2 The PDR is an opportunity for you to:
- Spend quality time with your team member, discussing their work objectives, goals, development needs and aspirations
 - Recognise and celebrate their achievements
 - Focus work activity and effort through agreed objectives
- 1.3 We also recommend frequent 1-2-1 conversations between you and your team member, and that you keep the PDR objectives updated at those meetings. This way it's a living document that reflects what they're currently working on.

[Back to the top](#)

2. The ICO PDR Process

- 2.1 The PDR form is online, in Workday. The process includes:
- An initial meeting in April-May, to review past performance and set objectives in line with business and departmental plans.
 - A six-monthly review, to update objectives, capture progress and discuss development needs.
 - Regular 1-1's, during which the objectives should be kept updated.

[Back to the top](#)

3. ICO Values

3.1. The PDR looks at what you do as well as how you do it, in line with our values. The [values toolkit](#) on IRIS will help you to consider how you demonstrate our values through your work and where there may be opportunities for development.

[Back to the top](#)

4. Before the PDR Discussion

4.1. You should review:

- Your team member's job description
- The team/ departmental business plan
- The ICO values

4.2 You should prepare to discuss:

- How they've performed against their previously agreed objectives
- How they've demonstrated the values
- Development and support needs
- Future objectives

4.3 Your team member will complete a self-evaluation, which you should review before you meet for the PDR discussion.

[Back to the top](#)

5. During the PDR discussion

5.1 The PDR covers 6 main areas:

- Review of Previous Period
- Feedback
- Personal Development Plan
- Objectives
- Additional Manager Evaluation
- Sign off

Review

- 5.2 The process begins with a self-evaluation. Your team member should think about how they've performed against their objectives, requirements of their role as per their job description and the values.
- 5.3 This is the part of the form that looks at past performance; how they have contributed to the goals of the team, what they are proud of and what perhaps hasn't gone so well?
- 5.4 When thinking about how they've demonstrated the values in their work, they should come up with some specific examples.
- 5.5 In workday, people can give and receive feedback throughout the year.
- 5.6 You'll be notified when your team member receives feedback, and any received during the review period before the PDR window opens will be displayed in this section of the form when you have your next review.

Personal Development Plan

- 5.7 Everyone should have a personal development plan. This isn't necessarily about career progression, it may be about developing skills to meet the changing needs of their existing role.

- 5.8 Your team member should create this plan, with your support. It's important that you review this regularly and provide the opportunities needed for development.

Objectives

- 5.9 This purpose of this part of the form is to review progress against previous objectives and set new objectives for the coming period.
- 5.10 Setting objectives will ensure that everyone in your team knows exactly what they personally need to do for the ICO to achieve its goals.
- 5.11 Objectives should be discussed and agreed as part of the PDR discussion and added to the form during the meeting or later by your team member.
- 5.12 All objectives need to link to one of the four enduring objectives. One of the objectives needs to be an EDI objective, linking to our [EDI action plan](#).
- 5.13 All people managers will also have a set management objective in their form, to recognise the work that goes into this important part of their role and support development if needed.

Additional Manager Evaluation

- 5.14 Once your team member has completed their self-evaluation, the form will be sent to you.
- 5.15 Before you add your own comments, you have the option to send the form to another manager for their evaluation. This might be appropriate if they have changed manager part-way through the year, or if they work in a matrix way, doing work for another manager.
- 5.16 As their line manager, you will sign off the fully completed form.

Sign off

5.17 Once you (and additional manager if applicable) have added your comments, the form goes back to your team member for final comment and sign off.

5.18 It then goes back to you for your comments and final sign off. Please make sure all of these process steps are complete by the end of the PDR window.

[Back to the top](#)

6 After the PDR Discussion

6.1 The objectives remain live for your team member to use throughout the year. Updating it regularly will capture progress and save time preparing for the next annual review.

6.2 There will also be a formal six monthly review, when you'll be asked to review progress against the values, objectives and personal development plan. This review follows the same process as above without the option for an additional manager evaluation. Instead, feedback from other managers should be encouraged through the feedback function in workday.

Feedback on this document

If you have any feedback on this document, please [click this link](#) to provide it.

[Back to the top](#)

Version history

Version	Changes Made	Date	Made by
1.0	[Insert text]	[XX/XX/XXXX]	[Insert name]

[Back to the top](#)