

Annex B – Draft Performance & Development Management Form – Notes on the use of form sections

1. SECTION A: INDIVIDUAL DETAILS. This section is mostly self explanatory. The individual completes the detail themselves.
2. SECTION B: CONTEXT. The context of the PDM form links the corporate tasks and office or section objectives with those of the individual.
3. Job purpose is the detail of the role and the general purpose of the job. This is the place for the line manager and the individual to outline and agree the ongoing job objectives that do not need (or yet need) specific, detailed key objectives attributed to them. Some areas may be expanded upon later in the annual PDM cycle, as other key objectives are completed.
4. SECTION C: INDIVIDUAL KEY OBJECTIVES. The line manager and the individual identify and agree the detail of key objectives that the individual needs to meet over the reporting period.
5. The key objectives will be drawn up using the SMART method: Specific; Measurable; Agreed; Realistic & Time-Bound.
6. The first sub-section is for the objective heading and its specific details. It is here that the line manager and the individual will agree the parameters of the objective.
7. The second sub-section 'Milestone(s)' should set out the measurable parts of each objective and correlating 'Target date(s)' and 'Date achieved' ensure that these are time-bound. The milestones and the target dates should be realistic to give the individual the opportunity to meet the overall objective.
8. The 'Development needs' and the 'Development method' sub-sections are embedded into the key objective so that there is a direct link between the objective and the development required to ensure the objective is achievable. These two sub-sections (and section E) effectively constitute what was previously the individual's Personal Development Plan (PDP).
9. The final sub-section 'Key objective comments' is where both the individual and the line manager have the opportunity to: make general comments; point out any alterations to the objective; provide an update to the progress of the objective and finally to review the objective and lessons learnt once it has been finalised.
10. SECTION D: OVERALL PERFORMANCE. The final section is slightly different from the previous ASR system. With the performance

management system being divorced from the performance-related pay system, there is no requirement for formal box-markings to describe individual performance. As there is no link to pay, it is expected that self-assessment and feedback in this section will become more open and honest.

11. In the first sub-section, individuals should provide a summary of their perceptions of their performance over the period covered. They should aim to also identify any development needs that still remain to assist them in excelling in their role.
12. In the second sub-section, the line manager should provide a summary of performance for the reporting period. Again, with no link to reward processes, feedback in this section should be open, honest and constructive. The performance box markings have been removed, so the manager must indicate here if performance is below the required standard. If this is the case, there will be *pro forma* wording in the guidance.
13. The final sub-section is for the Countersigning Manager to comment on the entire process and the individual's performance, but only at the end of the reporting year.
14. SECTION E: DEVELOPING FOR THE FUTURE. This section covers development needs that may not be directly linked to individual key objectives in section C.