

Chapter 4

Managing the PRC Meetings - Guidelines for Individuals

In this Chapter you will learn about your PRC meeting including

- How to prepare for the first, mid cycle & cycle end review meetings
- What to expect from the meetings

'If we look for success, we will find and create more successes. On the contrary, if we look for problems, we will find and create more problems'.

4.0 The purpose of the PRC meetings is for both parties to meet and

- discuss, clarify and agree role, key objectives and priorities for the cycle ahead
- discuss resources, risks, supports required
- discuss learning and growth requirements
- discuss how performance will be reviewed at the end of the cycle

4.1 Preparing for the Performance Planning and Personal Development Meeting (Meeting 1)

Ideally the cycle is preceded by a team discussion on the unit's service delivery requirements contained in the current service plan and team skills required for the coming year.

4.1.1 Meeting 1 - Part 1: Performance Planning

In preparation for this meeting you might;

- **Reflect on your own performance** over the last period – what areas did you do well in? What areas did you not do so well in? Can you identify ways you could improve/things that you would do differently again e.g. are there any gaps in the knowledge, skills and/or abilities required to deliver effectively on your objectives? How will you share this with your manager during the meeting? It's important that you put some thought into your skill areas in need of development in advance of the meeting so that they can be discussed and prioritised for the year ahead during the meeting.
- **Complete sections 1.1 and 1.2 of the PRC form**

- **Were you clear on your performance standards** for the last period – and if not, what discussion should you have with your manager this time to ensure clarity in expectations?
- **Consider the workings of your service/unit over the last period – and your contribution to it.** Are there areas that you consider improvements can be made – and if so, how they might they be achieved? How can you contribute to those improvements? How do you plan to address this with your manager during the meeting?
- **Are you clear on your role and priorities for the coming year?** You should consider what you will say when you and your manager are discussing *the Purpose of post* and *Priorities* section of the PRC form
- In the context of the service plan what **do you consider to be your priority areas for the year ahead?** What do you see as the most important objectives to be met? What are the timescales? What are the risks/challenges associated with you meeting/not meeting those objectives? Consider how these can be addressed during the meeting.
- **Spend some time familiarising yourself with the PRC Form and guidelines** on how to complete it (Chapter 5). You will need to complete Sections 1.1 & 1.2 in advance of your first meeting.
- Ensure that you **complete the sections of the form** in enough time so that your manager has adequate time to review them in advance of the meeting
- Make sure you **have access to any documentation that might be relevant to the discussion with your manager.** This will differ from role to role, but it is important that you both have access to any information to be discussed as part of the meeting in advance.

4.1.2 Meeting 1 - Part 2: Personal Development

The purpose of this part of the meeting is for you to review with your manager any development needs, personal or professional, required to achieve performance targets. This will include:

- a review of the knowledge, skills and abilities required in your role
- a review of your current level of development
- service driven CPD or PDP requirements

- statutory/professional requirements where relevant, e.g. Professional Competency Scheme for registered practitioners under the Medical practitioners Act 2007
- identification of any knowledge or skills gaps that might benefit from additional support

In preparation for this part of the meeting you might:

- **Reflect on your strengths** and be able to talk about examples of situations where you demonstrated positive strengths over the previous period. You may learn a lot by exploring a piece of work that went particularly well in the last period e.g. by identifying (1) what actions or behaviours contributed to the success (2) how you and others managed the situation/worked together – this may be very useful in terms of ensuring positive outcomes for similar projects into the future.
- **Consider your achievements** in the past and how you might be able to expand on your strengths and develop your skills further in the year ahead.
- **Reflect on your development needs** and reflect on examples of where your performance may not have met the standard required – what steps can be taken to ensure that it's at an appropriate standard next time?
- **Reflect on any development opportunities** that may present themselves as part of your role/the service plan - is there anything there that you would like to have exposure to for development purposes?

4.2 During the Performance and Personal Development Planning Meeting

What can you expect?

Your manager is encouraged to broadly address the following points as part of the meeting:

- **Briefly review and summarise prior meetings** when performance was discussed and the main points of focus that were agreed as a result of those. This will help to focus the meeting and will give you both an opportunity to reflect on how you have progressed over time
- Provide an **overview of how the unit or department has done overall** in the last period - what went well, and not so well
- What are the **priorities and challenges are for the coming year** (ref the Service Plan).

- **Discuss the performance management process** and how both of you will meet your responsibilities contained in the process
- Discuss the **importance and validity of ongoing two way feedback** and agree to have (potentially) unpleasant conversations if situation demands it
- Your manager may discuss with you what **motivates you in your role, what you particularly like about your job and what aspects you dislike or find particularly challenging**. This will provide a useful backdrop/context against which to review your performance and will also give your manager information in relation to potential future work responsibilities, development opportunities and developmental requirements.
- **Discuss your role** and what service driven accountabilities and responsibilities your manager would like you to do for the next period
- **Agree and discuss** these accountabilities and responsibilities in more detail; agreeing the specific objectives, performance standards, timescales, budget and other resources available, any potential obstacles and how they might be overcome
- As you progress through this meeting you should classify and enter these objectives into the relevant sections of the **Action Plan** on the PRC Form.
- Complete sections 1.3 and 1.5 of the PRC form

The objectives selected should reflect a mix of personal effort and input as well as personal output indicators and agreed performance standards. Objectives and performance outcomes need to be realistic and achievable but at the same time they should be challenging and serve to raise the standard of service provided. See Objective Setting in Appendix 4.

4.3 Preparation for the Mid-Cycle Review Meeting (Meeting 2)

The mid-cycle review facilitates a discussion between the manager and the individual on the:

- the status of objectives (complete, on target, delayed)
- barriers to progress (if applicable)
- timescales (pending, cancelled or otherwise revised)
- any risks to achieving/not achieving the objectives
- resources used and/or required

- training and development or other support needs

Complete sections 2.1 and 2.2 of the PC form and make available to your manager in advance of the meeting. There should be no surprises for you or your manager at this meeting if the liaison and feedback channels were open between you post Meeting 1.

4.4 Conducting the Mid-Cycle Review (Meeting 2)

What can you expect?

Your manager may open this meeting with a quick update on organisation/unit/team priorities/changes in priority since you last met.

She/he will continue with a review of progress made in the last period and discuss and agree actions to address any issues arising/agree approach to dealing with new priorities/challenges that have arisen since. You can amend your Action Plan on the PRC Form to reflect any changes agreed.

4.5 Preparing for the Cycle End Performance Review & Developmental Evaluation Meeting (Meeting 3)

This end of cycle meeting is an opportunity for you to formally review your achievements and development over the previous 12 months with your manager. As we know, performance reviews are most productive when they are a collaborative process, both parties have prepared for the meeting and there have been ongoing performance discussions and feedback exchanges during the year. There should be 'no surprises' for you at this review – any issues that arose should have been addressed as they happen during the year

Preparation:

- Ensure that you know well in advance the date, time and venue for the meeting
- You should have completed, and submitted to your manager, Sections 3.1 of the PRC Form so that they have an opportunity to reflect on it in advance of the meeting,

4.6 Conducting the Cycle End Performance Review & Developmental Evaluation Meeting (Meeting 3)

What can you expect?

This is the formal review of your achievements and development over the previous 12 months. Your manager will encourage you to discuss those aspects of your work that worked particularly well over the last period and will encourage you to reflect on what enabled the successful outcome. The idea is to find out about what things are working well and why, so that you/the organisation can do more of it. Of course, the discussion may also focus on aspects of work that did not work well in an attempt to identify the factors that effected performance. (See Chapter 6, Feedback and Engagement).

Your manager is encouraged to broadly address the following points as part of the meeting:

- **Agree the agenda**
- **Review the progress on objectives since the last meeting.** You and your manager are both encouraged to reflect on **specific examples** of good performance or underperformance, and the impact of that on your work
- You/your manager may wish to **explore in more detail the reason for the good performance or underperformance** e.g. was it to do with your skill/ability, your knowledge of the job, your motivation/interest in the job, your confidence levels or were there extraneous factors contributing to the underperformance.
- Your manager may also wish to discuss “**stretch and grow**” **objectives** with you. These will provide you with further opportunities for development e.g. getting involved in a new project, job rotation, leading a new team, new responsibilities etc.
- It is **important that you understand** when and where you were perceived to have achieved or underperformed and the impact of that on the task at hand/team/unit/wider organisational objectives. It is important that you agree with your manager how any underperformance can be improved upon.
- **Learning and Growth needs** will also be discussed and this is an opportunity for you to identify specific learning and growth needs that can be addressed in the following year.

You may wish to provide feedback to your manager on how the communication/working relationship between you may be enhanced. It is important that you plan how you are going to approach this conversation in advance of the meeting.

At the end of the meeting:

- Agree a summary of the main points discussed and the actions agreed
- Establish the immediate next steps
- Agree the time and date of the any follow up activities

If it is a case that you are found to be continuously underperforming, despite having received additional support/development, you may be required to participate in a Performance Improvement Process (PIP). There is more on this in Chapter 7