PDR Online System

Guidance for Academic Staff



This is a short step-by-step guide to completing PDRs on the online system

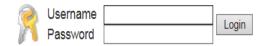
System Login



Loughborough University Login

Enter your username and password

A service has requested you to authenticate yourself. Please enter your username and password in the form be



Login to the system using your university username and password

Help! I don't remember my password.

Without your username and password you cannot authenticate yourself for access to the service. Please contact the IT Service Desk for assistance.

Website maintained by: IT.Services@lboro.ac.uk

System Assistance







Any problems or questions regarding the PDR online system can be submitted using the 'help' function



PDR Help

I'm having a problem with...

-- choose an option --

- my Outputs data
- my SciVal data
- my Research Staff managed
- my funding held
- my funding applications
- my Enterprise funding
- my my.HR learning record
- a technical issue with the Review

Select the relevant option from the dropdown and type your message in the box below

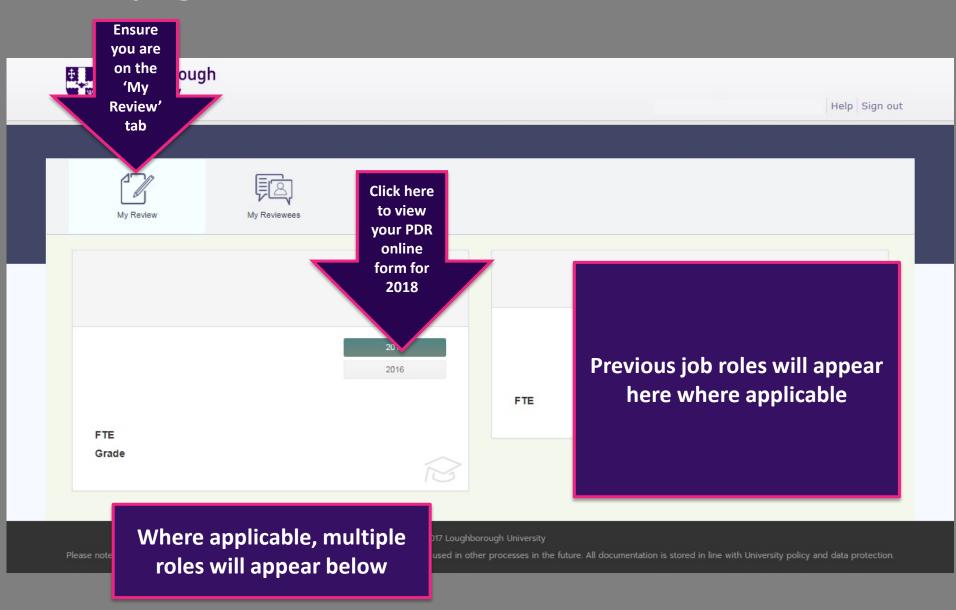
Close

Send

×

Preparation Section - Reviewee

Homepage



Guidance

carefully read through the guidance notes, following the links to the PDR website for further information

Initial

Guidance

Personal Details

Preparation

Review of Past Year

Research

- Research Outputs
- Publication Visiblity
- Research Funding
- Research Supervisions

Teaching

Enterprise

Leadership

- Internal
- External

Guidance

Please see the PDR guidance for further information relating to the PDR process http://www.lboro.ac.uk/internal/pdr/

For help using this PDR online system, please see the guides on the PDR website for Academic Staff and for Professional Services staff.

Please note:

- The form saves automatically
- Your form will NOT be accessible to your reviewer until you click 'Share Prep With Reviewer'
- You can edit your form at any time, until the form is submitted to the Senior Review Group

Work
your
way
through
each
page to
prepare
for your
PDR

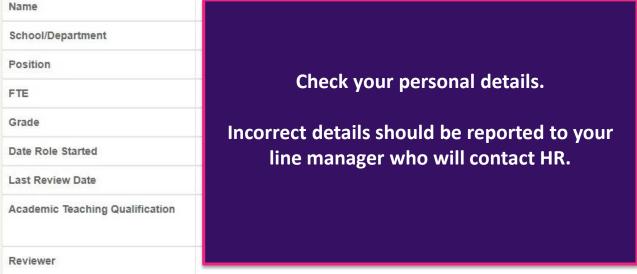
Next

Personal Details



Personal Details

This section is information about your role that is taken from iTrent. If any of this information is incorrect then please discuss it with your line manager, who should then contact HR to ask for updates to be made. Any changes made will take 24 hours to refresh.



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Next

Review of Past Year



Review of Past Year

Category

Objective

Comment

Supported by

Action by when

This section gives you the opportunity to review your PDR Performance and Development objectives over the last 12 months.

Agreed Performance Objectives

Your objectives from your last PDR will appear here. Use the comment box to Review your progress against each objective; highlighting your successes and challenges.

Review of Past Year

Comment

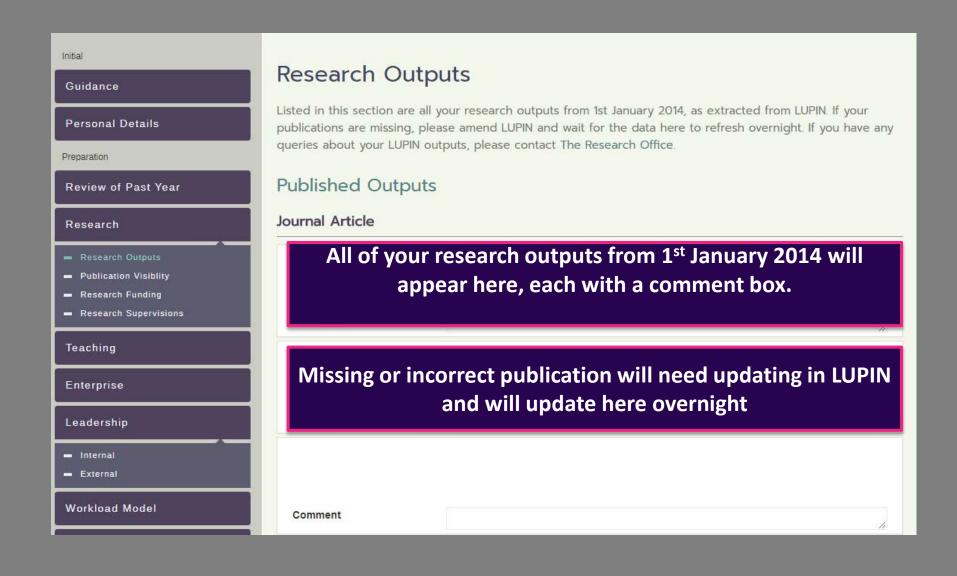
Use this space to record your achievements, progress for this year. Include any changes to your original objectives agreed throughout the year. Remember to highlight any particular successes or challenges you faced in meeting your objectives.

Please note for this year only, if no objectives are shown above then in addition to reflecting on your performance you will need to copy and paste your Performance and Development objectives into the box below, commenting on how well you have met them.

Please Note

If you didn't use the PDR online system for your PDR last year OR you if you have changed roles/contracts at the university your objectives will not automatically appear above. You will need to copy and paste any objectives set throughout the year in the comment box at the bottom of this page.

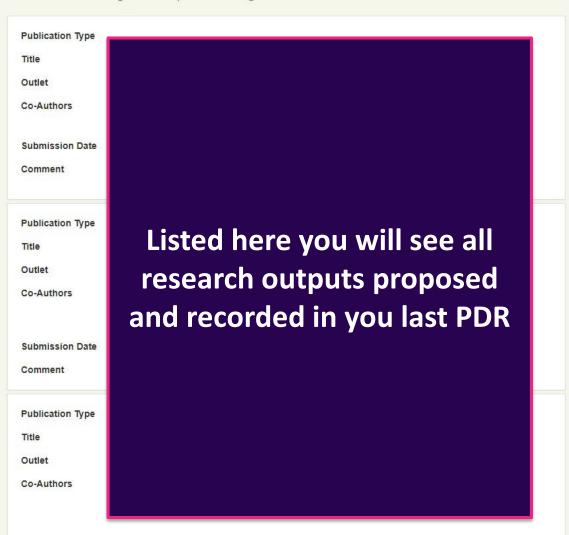
Research Outputs



Research Outputs

Outputs Proposed in Last PDR

Listed in this section are research outputs proposed in your last PDR which you planned to develop over the past 12 months. These are included here to reflect on anticipated research activities between one year and the next but it is recognised that plans do change.



Research Outputs

Outputs Proposed for the Next 12 Months

Please provide research outputs you anticipate submitting in the next 12 months. These are requested to provide a full picture of research activities, actual and planned, over the period of the year, but it is recognised that plans do change.

Publication Type *

Title *

Outlet

Co-Authors

Submission Date

Comment

Here you can propose research outputs for the next 12 months

Add Another

Comment

Please use this space to reflect on your research activities since the last PDR and also your future plans. Future plans might look towards a 3-5 year period but there should be clarity about plans for the coming year, expanding on any aspects of the form that you consider need explanation.

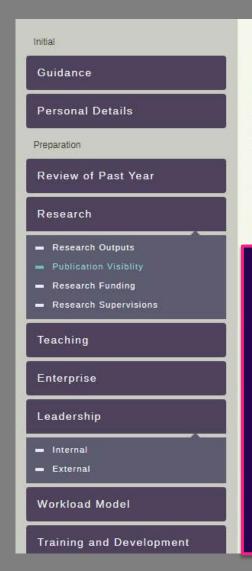
Please Note

If you did not use the PDR online system for your PDR last year OR you if you have changed roles/contracts at the university your proposed research outputs will not automatically appear above.

You will need to copy and paste any proposed research outputs into this comment box.

You may also use this space to reflect on your research activities and your future plans.

Research Publication Visibility



Publication Visiblity

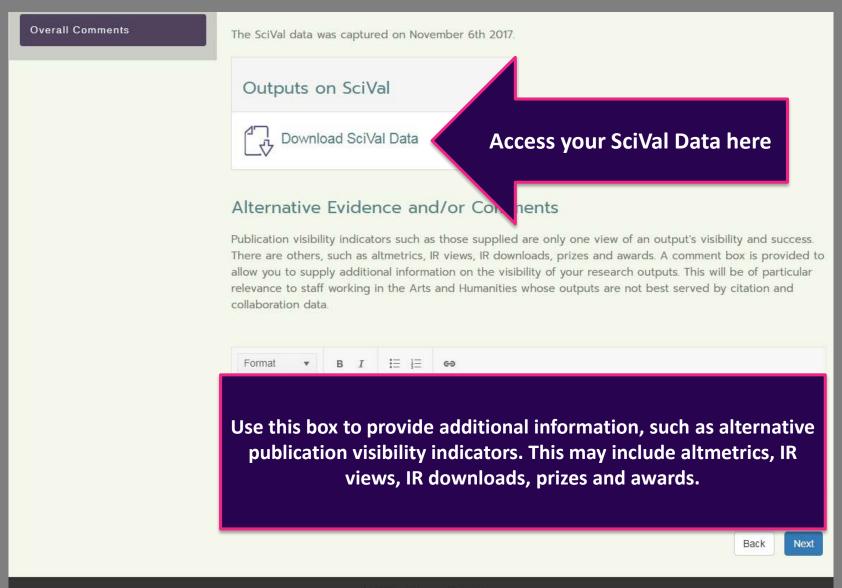
Ensuring your publications are of the highest possible quality and are as visible as possible, enabling others to find, read, and build upon them, is a critical part of the scholarly endeavour. The following data has been supplied to enable you to have a conversation with your Reviewer about your publication strategy. Some guidance on the indicators provided is given below. You are also invited to supply alternative evidence of the visibility and impact of your publications, or provide comments on the indicators, in the text box below. See also the Scholarly Communications website.

Publication Visibility Indicators

Here you will find information on the PDR publication visibility indicators for 2018/19.

Some members of RT&E staff are provided with a list of all the outputs allocated to them in the SciVal citation benchmarking tool for the years 2014-18 Information is provided for each output to enable you to have a detailed conversation about your publication strategy.

Research Publication Visibility





Research Funding

Listed in this section will be all current research grants held in an Agresso J code for which you are acknowledged as PI or Co-I. Please note that the award values do not include any third party income. Details of consultancy activity is included in the subsequent Enterprise section.

Current Funding Held

Here you will see current research grants held in an Agresso J code for which you are acknowledged as PI or C-I.

Any queries in terms of research funding should be reported to the Research Office

minorpar myesugator

Applications for Funding

This section will include any submitted research funding applications which have been approved by your School through the Agresso Costing Tool since 1st August 2015, including any which have been unsuccessful.

Pre-Award Reference	Application Date	
Funder	Type of application	
Loughborough Total	Total Value	
Anticipated Start Date	Anticipated End Date	
Lead Principal		

Here you will see all submitted research funding applications (including unsuccessful applications) which have been approved by your school through the Agresso Costing Tool since 1 August 2015

Funding Plans Proposed in Last PDR

This section displays the funding plans you submitted in your last PDR.

Proposed Title

Funding Body

Total Value (£)

Value to Department (£)

Role

Co-Applicants

Percent of Time

Submission Date

Comment

Listed here you will see all funding plans recorded in your last PDR

Please note

If you did not use the PDR online system for your PDR last year OR you if you have changed roles/contracts at the university your proposed funding plans will not automatically appear above.

You will need to copy and paste any proposed funding plans into the comment box at the bottom of this page.

Applications for Funding Intended for the Next 12 Months

Please provide details of research funding you anticipate submitting in the next 12 months. These are requested to provide a full picture of research activities, actual and planned, over the period of the year, but it is recognised that plans do change.

Proposed Title *

Funding Body *

Total Value (£)

Value to Department (£)

Role

Co-Applicants

Percent of Time

Submission Date

Comment

Here you can add the applications for funding you plan on submitting over the next 12 months

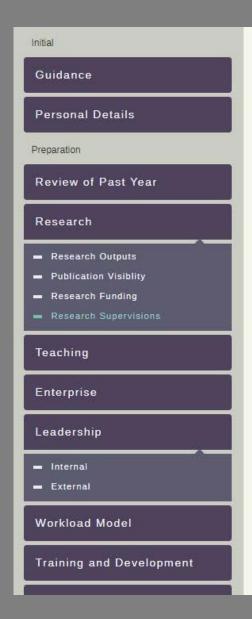
Add Another

Comments

Please use this space to comment on your funding plans from last year. You may also wish to include details of any other funding or support for your activities not listed above.

Use this box to reflect on your funding plans from last year, and detail anything missing from above

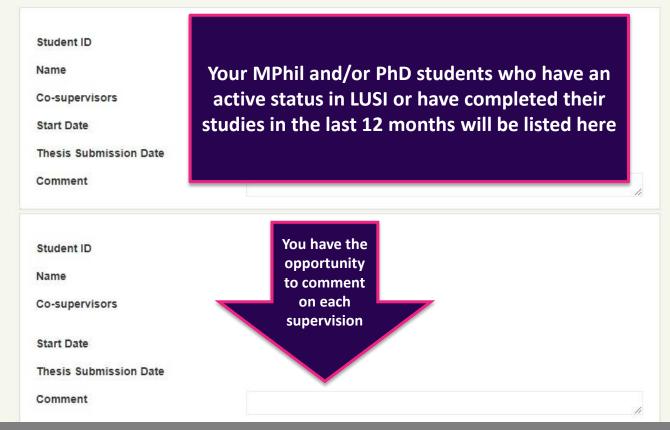
Research Supervisions



Research Supervisions

Research Student Supervision

Listed here are MPhil or PhD students for whom you are indicated as a supervisor and who have an active status in LUSI, and in additional any that have completed their studies in the last 12 months.



Research Supervisions

Research Associate Staff Managed

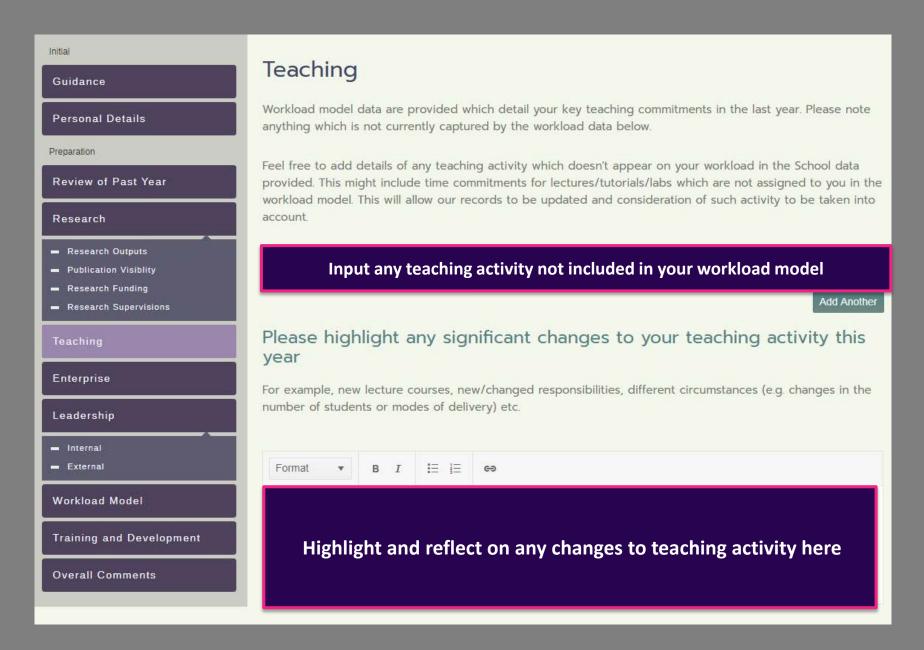
Where applicable, research staff you manage will appear here. If any are incorrect you will need to contact HR

Any Additional Comments

Please use this space if you wish to make any further comments on your supervisions.

Use this space to reflect or make on further comments on your supervisions over the last 12 months

Teaching



Teaching - continued

Good Practice in Learning and Teaching

Please reflect on how you have ensured good practice in learning and teaching in each of the following three areas, including evidence of good practice where appropriate. You are encouraged to refer to the University's Framework for Good Practice in Teaching and Learning and the UK Professional Standards Framework.



Use the four boxes below this to comment on how you have ensured good practice in:

- Learning and teaching
- Curriculum design, delivery, development and education
- Student engagement, support and development
- Professional learning and career development

The links above should be used to refer to the University's Framework for Good Practice in Teaching and Learning, and the UK Professional Standards Framework

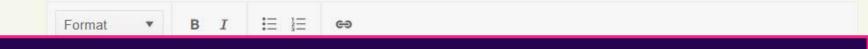
Curriculum Design, Delivery, Development and Evaluation



Teaching - continued

Are there any particular examples of innovation and/or successful best practice which you would like to highlight?

Include in this section any awards for teaching related activities, or any teaching and learning grants you are involved in (applications made and ongoing activity).



Use this space for details of any awards for teaching related activities, or teaching and learning grants you are involved in

Back



Enterprise – Impact and Partnerships



Impact & Partnerships

Partnerships

List external partners and the nature of the activity with them. Partnerships can include commercial and non-commercial organisations - but only include formal connections here. Include any collaboration that benefits your enterprise, research and/or teaching activities, and explain how you have liaised with the organisation (s). If you are planning to develop any new partnerships over the coming year, please also mention this in brief (you may wish to say with whom, why, what you hope to achieve, and indicate what support if any you may need from your School and/or the Enterprise Office to make the partnership a success).

Use this space to:

- List external partners
- Include any collaboration that benefits your enterprise, research and/or teaching activities, explaining how you have liaised with the organisation
- Briefly describe any partnerships you are planning to develop over the coming year

Enterprise – Impact and Partnerships

Workload Model

Training and Development

Overall Comments

Activities in Impact Tracker

Listed below are any projects that you are currently associated with in the Vertigo Ventures Impact Tracker (VVIT), as project owner/PI, or where you are listed as a collaborator on other staff members projects. Not all academic staff will be using or be expected to use VVIT, depending on career stage and system roll-out in each School. If you are unsure please check with your ADE, ADR or PDR reviewer.

This information has been extracted to aid discussions between reviewers/reviewees around impact projects, case studies and in consideration of what stage along the impact pathway you might be (Inputs, Activities, Outcomes, Impact).

Listed here you will see projects you are associated with in the Vertigo Ventures Impact Tracker (VVIT). Should you make any amendments in VVIT, please note these will take 24 hours to appear here

*A super project is an umbrella project encompassing several projects

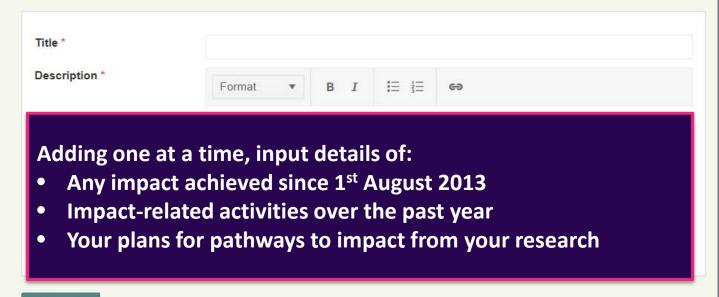
Enterprise - Impact and Partnerships



Impact

Add Another

Summarise any impact achieved since 1 August 2013, any impact-related activities over the past year and your plans for pathways to impact from your research. Impact can arise at any point during the research process, so you can include impact that has emerged from projects completed in previous years. Include any examples of income, sponsorship, recognition, awards, patents, licenses, or other distinct outcomes that have arisen. Importantly, include any measurable evidence that change has taken place in response to your research - this may be economic, environmental, social or technological change. Describe the nature of that change (impact), who has benefited, and to what extent. Refer to your Associate Dean (Enterprise) for advice, or access this site for useful resources on impact: http://www.fasttrackimpact.com

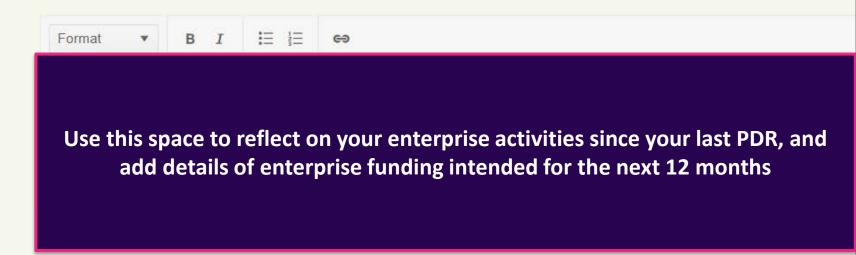


Enterprise – Impact and Partnerships

Enterprise Self Reflection

Please use this space to reflect on your enterprise activities since the last PDR and also your plans for the coming year, expanding on any aspects of the form that you consider need explanation.

Please also add details of enterprise funding intended for the next 12 months.



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Enterprise – Funding

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- Research Supervisions

Teaching

Enterprise

Enterprise Funding

Enterprise Funding Held

This listing includes all funding received via Enterprise Projects Groups and other mechanisms within the Enterprise Office.

Listed here you will see all funding received via Enterprise Projects Groups and other mechanisms within the Enterprise Office

Enterprise Funding Plans Proposed in Last PDR

This section displays the funding plans you submitted in your last PDR.

Listed here you will see funding plans from your last PDR.

Enterprise – Funding



Applications for Enterprise Funding Intended for the Next 12 Months

Please provide details of enterprise funding applications that you anticipate submitting in the next 12 months. These are requested to provide a full picture of enterprise activities, actual and planned, over the period of the year, but it is recognised that plans do change. For more information on Enterprise at Loughborough University please see http://www.lboro.ac.uk/services/enterprise/

Proposed Title *

Funding Body *

Total Value (£)

Value to Department (£)

Role

Co-Applicants

Percent of Time

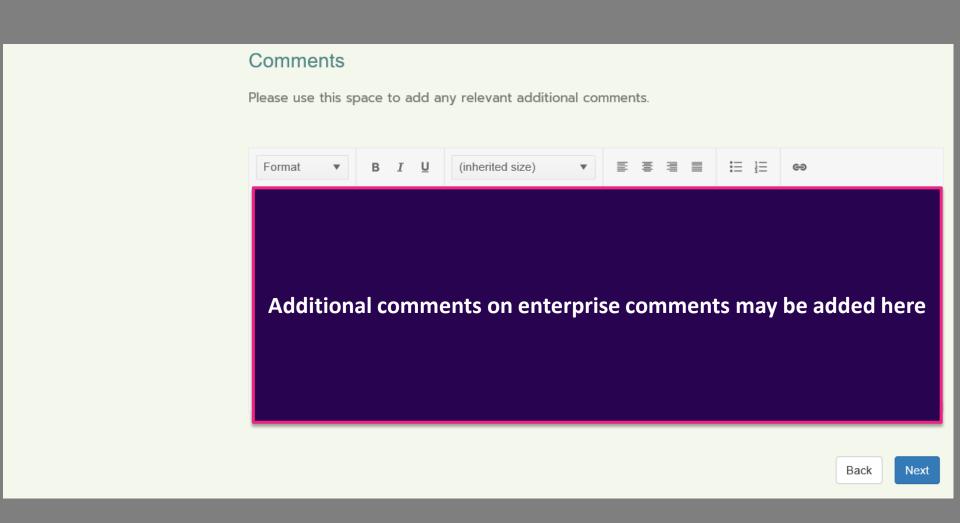
Submission Date

Comment

Here you can add details of all enterprise funding applications you intend submitting in the next 12 months

Add Another

Enterprise – Funding



Leadership - Internal



Leadership, Management and/or Collegiality

Use this section to reflect on your substantive leadership, management and collegiality roles and activities across your School and the University. Some roles may be clearly identified in your School workload model, others may not. You may be more familiar with a management role being known as an administrative role in your school.

For Reputation and Influence (Esteem) and substantive roles held externally, please see the external leadership section.

Substantive roles not referenced through the Workload Model (WLM)

Add roles one by one

Add Another

Self Reflection

This is a summary of your reflections on your leadership, management and/or collegiality within the School, or more broadly across the University. Your reflections may include things that you have learnt or developed in this area in the last 12 months or things that you feel would help you develop further. For this section it may be useful for you to complete the online Loughborough Leadership Framework, which is a self-assessment development tool aimed at helping you reflect on this area of your leadership attributes.

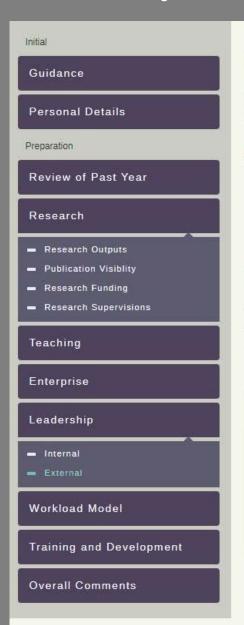
Format ▼ B I 🗄 🛱 😝

Reflect on your leadership, management and/or collegiality within the school and the university

Back

Vext

Leadership - External



External

In this section you are given the opportunity to reflect on any leadership or other substantive roles you hold which are external to the University.

Substantive or Leadership Roles Held Externally

Add external roles one by one

Add Another

Back

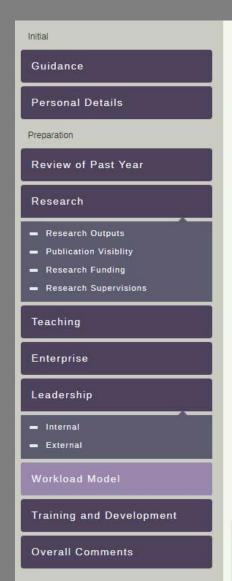
Next

Reputation and Influence (Esteem)

Please use this section to record other activities, invitations or awards that highlight your current reputation and influence outside the University, indicating whether they are at national or international level. This does not need to be limited to new indicators from the past year.



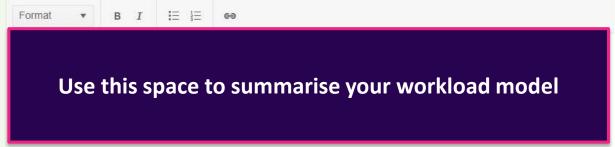
Workload Model



Workload Model

A summary of your Workload should be provided by your own School offline from this system, and is therefore a reflection of your workload as recognised by your own Senior Management Team (SMT).

Summary

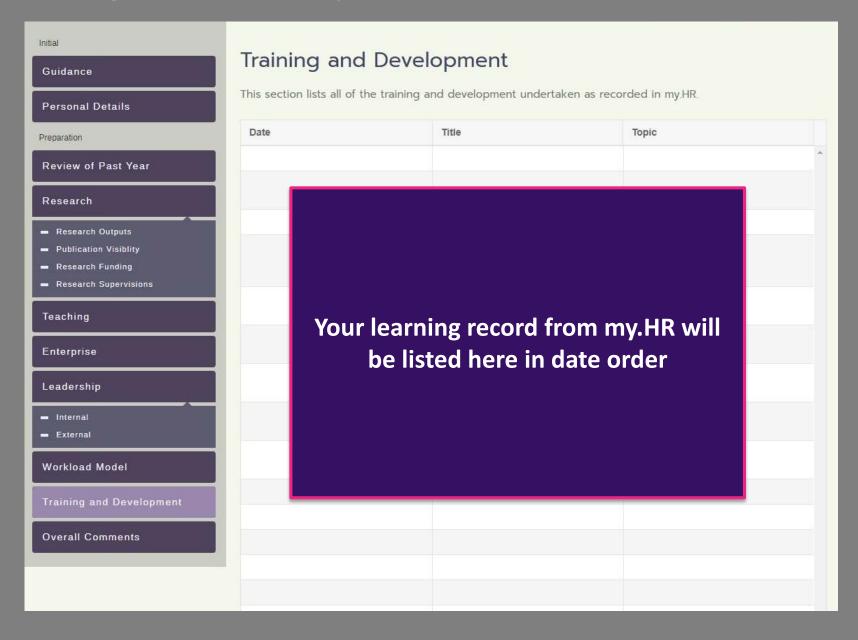


Comment

The workload summary presents the balance of the activities that comprise your total workload for the year. You should reflect on the activities that comprise your workload and may comment on the balance between these activities and/or the total workload for the year. You may also wish to comment on significant activities that affect the overall shape of your workload, such as fellowships, significant administration loads or exceptional activities that have or may impact your workload.

Use this space to reflect on the activities that comprise your workload and comments on the balance between these activities and/or the total workload for the year

Training and Development



Training and Development

Additional Learning and Development

If you have undertaken any development activities not listed above then please include these in the space below. You can also add additional training into my.HR to ensure your personal learning record is accurate. This will update every 24 hours.



This box can be used for any development which is not listed above

Proposed Development Activities

Please use this space to suggest any development activities which you think will be relevant to your role over the coming 12 months.

This box can be used to suggest any development activities you might undertake over the next 12

months.

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Next

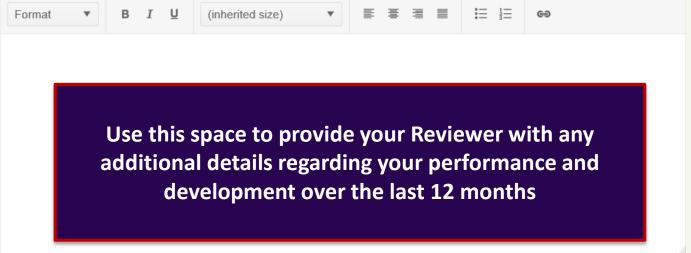
Overall Comments



Overall Comments

This is an opportunity to add any additional information that you feel is relevant to your performance and/or development. This information may be useful in reviewing your past objectives or thinking about your future objectives.

Comment

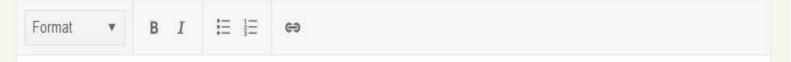


Overall Comments

Proposed Objectives

Please use this space to suggest what objectives you might try to achieve next year. Future objectives will need to be agreed with your reviewer in both performance and development so it is helpful to give this consideration prior to your PDR.

Proposed Objectives

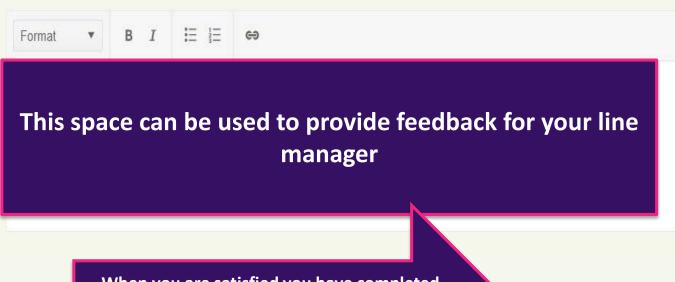


Use this space to suggest potential performance and development objectives for the next 12 months

Overall Comments

Line Manager Feedback

If you have any feedback for your line manager please enter it below.



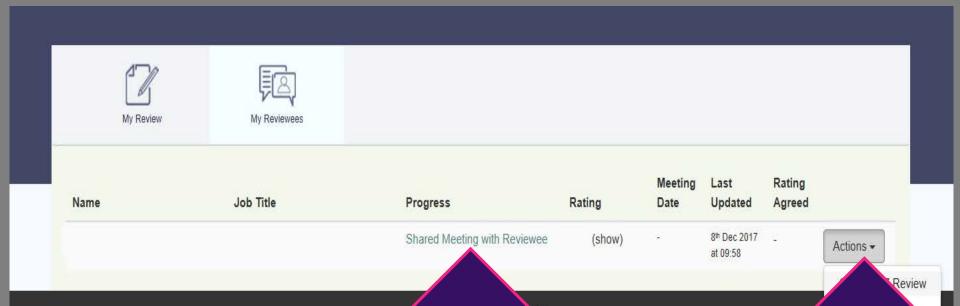
When you are satisfied you have completed your preparation work, click this button to share with your Reviewer.

This will trigger an email to notify them.

Share Prep With Reviewer

Meeting Record Section - Reviewer

Reviewers only



Check that
your
Reviewee
has
completed
their
preparation

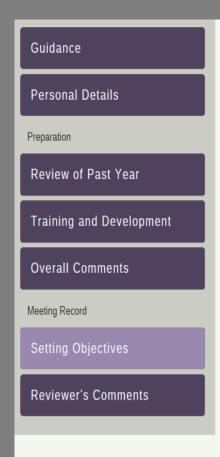
Select 'open 2018 review' from the drop down to view the Reviewee's preparation. Where applicable you will also be able to view the 2017 PDR.

Setting Objectives (Performance)

Reviewers only

Details of the

objective are





Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

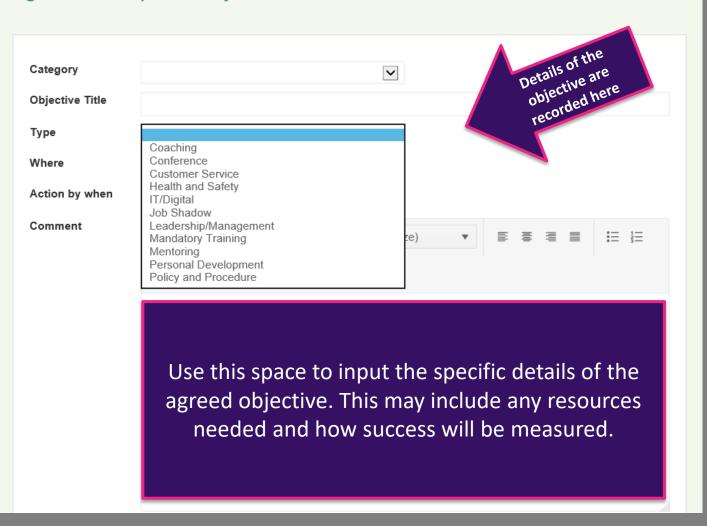
Agreed Performance Objectives

recorded here Category **~** Performance **Objective Title** Action by when Comment <u>=</u> = Format B I

Use this space to input a description of the agreed objective. This may include and resources needed and how performance will be measured.

Add Another

Agreed Development Objectives



Reviewers only



Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

Discussion Summary



Use this space to summarise the PDR meeting, including the rationale behind the recommended performance assessment rating.

Use the calendar to input the date of the meeting

PDR Meeting Date

Please enter the date on which the PDR discussion took place.



Reviewers only

Select recommended rating from drop down menu

Recommended Performanting

Recommend exceeds expectations

Recommend meets expectations

Recommend does not meet expectations

N/A - started position since 1st October

Please enter at least one development and performance objective, meeting notes, meeting date and a rating (and supporting statement if recommending exceeds exceeds) before sharing.

Share Meeting Record with Reviewee

Check through the objectives, discussion

Check through the objectives, discussion

Summary and recommended performance

Summary and recommended performance

This button to share with your

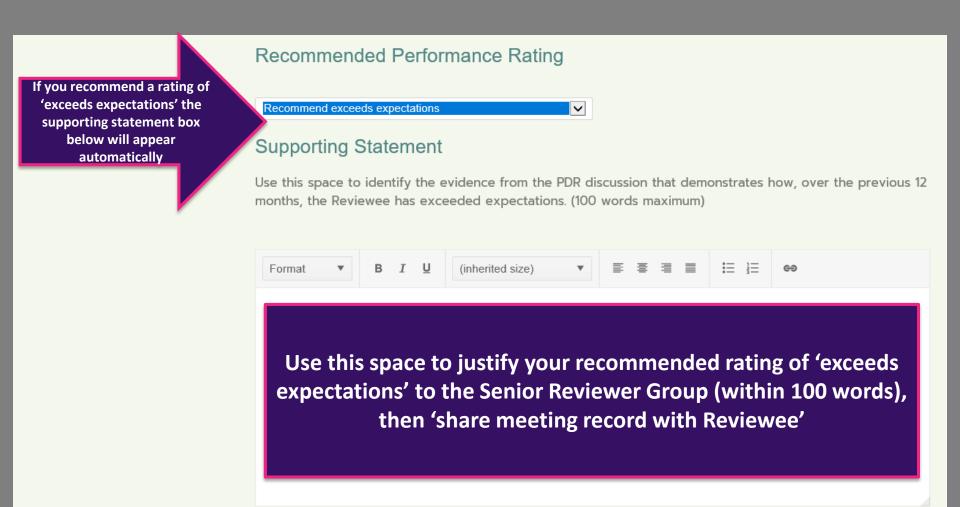
To share with your

Tating then click this button to share with your

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This will trigger an email to notify

Them.



PDR Agreement - Reviewee

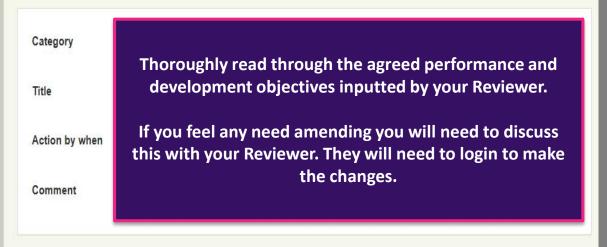
Reviewees only

Initial Guidance Personal Details Preparation Review of Past Year Training and Development **Overall Comments** Meeting Record Setting Objectives Reviewer's Comments PDR Agreement

Setting Objectives

This is a summary of the PDR conversation. Use the spaces to list the agreed performance and development objectives identified for the forthcoming year. Remember to ensure that all objectives are SMART - Specific, Measurable, Achievable, Relevant, Timed.

Agreed Performance Objectives



Agreed Development Objectives

Category	[Nothing entered]
Title	

Reviewees only

Initial Guidance Personal Details Preparation Review of Past Year Training and Development **Overall Comments** Meeting Record **Setting Objectives Reviewer's Comments** PDR Agreement

Reviewer's Comments

Please use this space to summarise the discussion that took place during the PDR meeting, with reasons to explain the recommended rating. Please note that, whilst the PDR conversation is confidential, the documentation is not and may be used in the future for other processes, such as Reward Review.

Discussion Summary

[Nothing entered]

PDR Meeting Date

Please enter the date on which the PDR discussion took place.

Check that your
Reviewer's discussion
summary and PDR
meeting date are
correct

05/01/2018

Recommended Performance Rating

Your recommended rating will appear here

Back

Next

PDR Agreement

Reviewees only



PDR Agreement

Please complete this section before submitting the PDR form to be reviewed by the Senior Review Group. You are able to continue to edit the form at any point until you click "Submit".

Reviewee

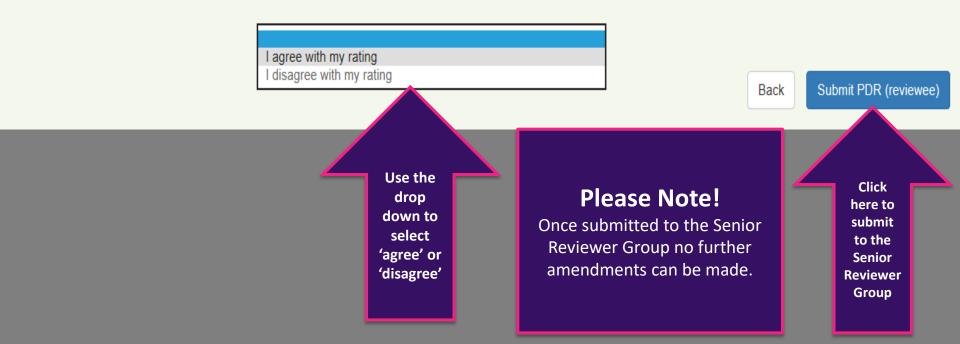
Please use the space provided to make any comments you have regarding your recommended performance rating.



This space can be used if you wish to make any comments in terms of your recommended performance assessment rating

I agree with the recommended rating

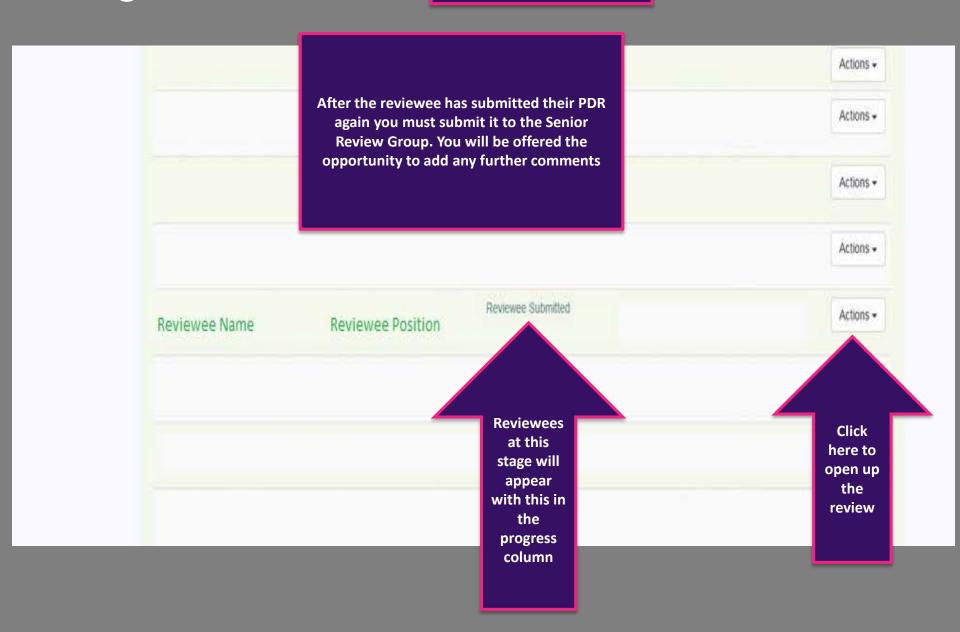
If you agree with your rating please select "agree" from the dropdown box below. If you do not agree please use the comments box to state the reasons why you are in disagreement with your recommended rating and select "disagree" from the dropdown.

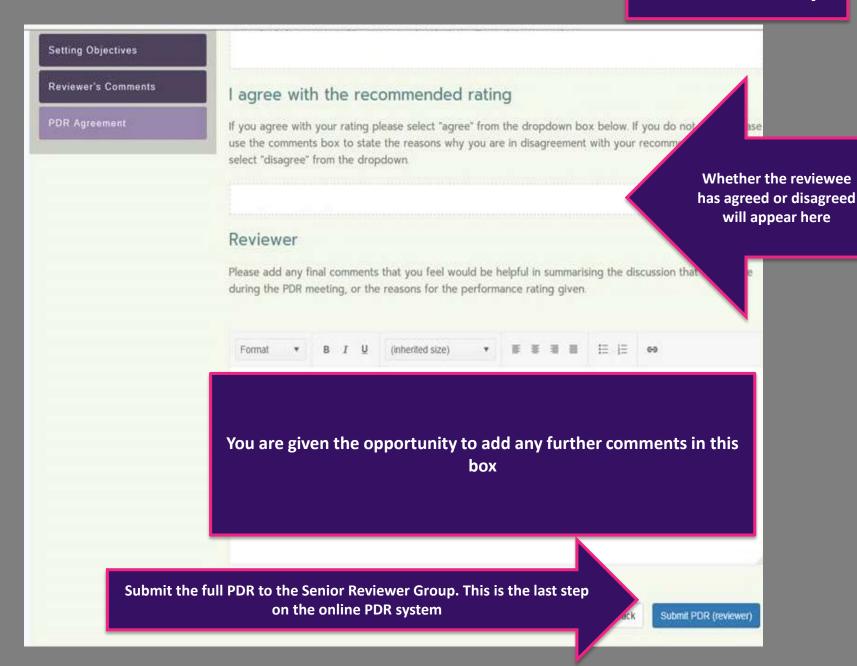


PDR Agreement - Reviewer

PDR Agreement

Reviewers only









Inspiring Winners Since 1909