Management Band PDR Guidelines

Full Guide | Professional Staff

Updated June 2022

Review Period

The PDR review period is from November to October the following year. A minimum of three full months' work is required. A standard year may look as follows:

Dates	Detail
01 November	Review year starts
November to August	Progress Updates

01 August – 31 October	Formal End of Year Review commences
	    - Performance reviewed
	    - Goals and development objectives
	    - Salary review recommendations (if eligible)

31 October	Review year ends. Department head recommend outcomes for Divisional Review
15 November	Divisional Head approves final outcomes and salary increases
01 December	Letters generated for staff with approved salary increases
01 February	Salary increases applied

Guidelines

- Prepare for the PDR by reviewing your achievements over the previous year and consider what you had planned to achieve during the current reporting period.
- During your PDR discussion, you will be expected to outline your achievements, provide evidence/specific examples and discuss your performance and future development.
- The outcomes of the meeting will be recorded on the Management Band PDR Form.
- Management Band roles, including advisor positions, are leadership roles. The holders are individually accountable for their results, how well their area(s) operates, and the manner in which they perform their role.
- **NOTE:** The PDR Competency **_Leadership and People Management_** is a compulsory competency when making an overall assessment.

Assessment

Your performance will be assessed on:

- How the current years outcomes have been achieved and how you have applied your skills, knowledge and behaviours. At this level the expectation is high and the set outcomes are appropriately challenging. They require evidence of a corresponding level of performance reflected in the competencies.
- Your achievement of the requirements of the position as outlined in your previous PDR, business plans, and the position description.
- How you assess against the PDR competencies (using 360 degree and other feedback mechanisms)
- How you have progressed in meeting development goals set for the previous 12 months.
- How you have supported other areas/departments/teams across the University

Set Expected Outcomes, Future planning, and Development

You and your reviewer will set expected outcomes and development goals for the following year.

- Goals, objectives or expected outcomes are you keen to work towards for the upcoming year (and beyond).
- Alignment with division / department team priorities and University strategies is encouraged (e.g. University Strategic Direction, Māori Strategic Framework, Pacific Strategic Framework and Sustainability Strategic Framework).
- Alignment with our shared values Respect, Integrity, Curiosity and Community.
- Development opportunities to support you to achieve these objectives.
- Career aspirations and opportunities for career growth.

Make sure that these are SMART (i.e. Specific, Measurable, Agreed, Realistic, and achieved within a set Timeframe).

Impact of unexpected circumstances

Reviewers should consider the impact of unexpected events/circumstances that may impact a staff member's ability to achieve expected outcomes (e.g. impact of COVID-19, natural disasters etc.). These considerations should be noted when finalising outcomes.

Additionally, reviewers should also consider how staff may have acted above and beyond to support and contribute during these same situations. This should also be considered when finalising individual performance outcomes.

Salary Review

Current Management Band Ranges can be found here: https://www.otago.ac.nz/humanresources/working-at-otago/salaries-and-payments/pay-scales/

Salaries will be reviewed using the following criteria:

Current Salary Scale Position	Overall Assessment	Options
Any Level	Requires improvement	No progression
Any Level	Not Started	No progression
Any Level	Not Assessed	No Progression
Any Level	Working Satisfactorily	No Progression
Minimum to the Scale Midpoint	Fully Competent	Eligible for an increase up to $2000. This cannot exceed Scale Midpoint.
	Exceeds expectations	Eligible for an increase up to $2000.
	Outstanding	Eligible for an increase up to $2000.
Movement from the Minimum past the Scale Midpoint	Fully Competent	No progression
	Exceeds expectations	Eligible for an increase up to $2000.
	Outstanding	Eligible for an increase up to $2000.
Scale Midpoint to Merit Range Midpoint	Fully Competent	No progression
	Exceeds expectations	Eligible for an increase up to $2000. Cannot exceed Merit Range Midpoint.
	Outstanding	Eligible for an increase up to $2000.
Movement from Scale Midpoint past the Merit Range Midpoint	Fully Competent	No progression
	Exceeds expectations	No progression
	Outstanding	Eligible for an increase up to $2000.
Merit Range midpoint to Maximum	Fully Competent	No progression
	Exceeds expectations	No progression
	Outstanding	Eligible for an increase up to $2000. Cannot exceed the Maximum

The performance expectation both in terms of outcomes and competencies will increase from the bottom of the salary range to the top of the salary range

If the reviewer believes that the staff member has been remunerated appropriately, considering the staff member's current salary and performance level, their salary will remain at its current level.

Salary Increase Limits

Salary increases can be recommended for up to **$2,000**. Increases above this amount are rare and requires a written recommendation from Division Head and approval from the Vice-Chancellor.

Salary increases cannot exceed the maximum of the band.

Salary decisions will be confirmed in writing. The letter will be prepared on 01 December. All salary increases that result from this process will be effective from 01 February the following year.

If there are any concerns with the process or the outcomes, please talk with your manager, Human Resources or email hr.pdr@otago.ac.nz for more information. You can also refer to the main PDR Guidelines located on the PDR web page for more information.