

Parental leave 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 <ul style="list-style-type: none">- 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

Staff on parental leave still participate in the PDR process. Reviewers assess the staff member's performance during the months that they worked over the review period; and ideally development opportunities are discussed prior to the staff member starting parental leave.

The underlying principle is that employees **should not** be disadvantaged by taking parental leave. Reviewers can manage this on a case-by-case basis.

Principles

The sections of the PDR form which review outcomes and establish the overall assessment of performance (**section A** and **B**) should be completed prior to the staff member starting their parental leave, whatever the time of the year. Development opportunities can also be discussed at this time **section D**).

The following principles apply:

Going on parental leave	If staff member has worked three months in the current review year (November – October) and not available between August and October, review takes place prior to going on parental leave.
Returning from parental leave	If a staff member has/will work at least three months in current review year (November – October) and is available between August and October, review takes place as normal.
Insufficient time for review	The rating from the previous year is applicable.

There is always a review for staff on Parental Leave as part of the normal review process.

Exceptional Circumstances

In exceptional circumstances, there is provision for an individual salary review outside the PDR process. A memo explaining the reasons for the individual salary review should be signed by the Divisional Head and forwarded to the Director of Human Resources for approval.

Any salary increase would be backdated to 1 February. The process should be applied flexibly to suit the circumstances. Please see the examples below.

Please email HR.PDR@otago.ac.nz if you have any questions.

Examples

1. Parental leave from 1 March until 31 August

- A PDR discussion to review outcomes and establish an overall assessment of performance is completed in February. Development opportunities may also be discussed.
- In September / October, another PDR discussion takes place where the PDR form from the February discussion is reviewed, and expected outcomes and development opportunities for the next 12 months are also included.
- A salary review is to be considered as part of the PDR process.

2. Parental leave from 1 July until 30 June the following year

- A PDR discussion reviewing performance is completed in June before the parental leave commences. Development opportunities can also be discussed.
- A salary review is to be considered part of the PDR process and implemented on 1 February the following year if appropriate.
- In early July, after the parental leave, expectations should be clarified, and goals set. Development opportunities can also be discussed.
- In late October, the PDR discussion takes place considering the review period from July until late October. A salary review is to be considered as part of the PDR process.

3. Parental leave from 15 October until 14 October the following year

- The PDR process will have been completed and any salary increase will be effective from the 1 February the following year.
- On return to work, the PDR process will nearly be complete, and there will be no performance to review. It may be appropriate in these circumstances to plan an individual salary review outside the normal process.
- The Head of Department estimates a salary increase based on previous performance levels in the notes field on the PDR application (if applicable).
- In late October, expectations are clarified, goals set and an appropriate date for the PDR discussion agreed. The date should allow a few months for the staff member to demonstrate their level of performance. The PDR discussion should be completed on the agreed date.
- A memo explaining the reasons for the individual salary review, detailing the salary increase outcome and highlighting any change from the estimation (and the reasons) should be signed by the Divisional Head and forwarded to the Director of Human Resources.
- Any approved salary increase will be effective on the 1 February after the staff member returned to work.