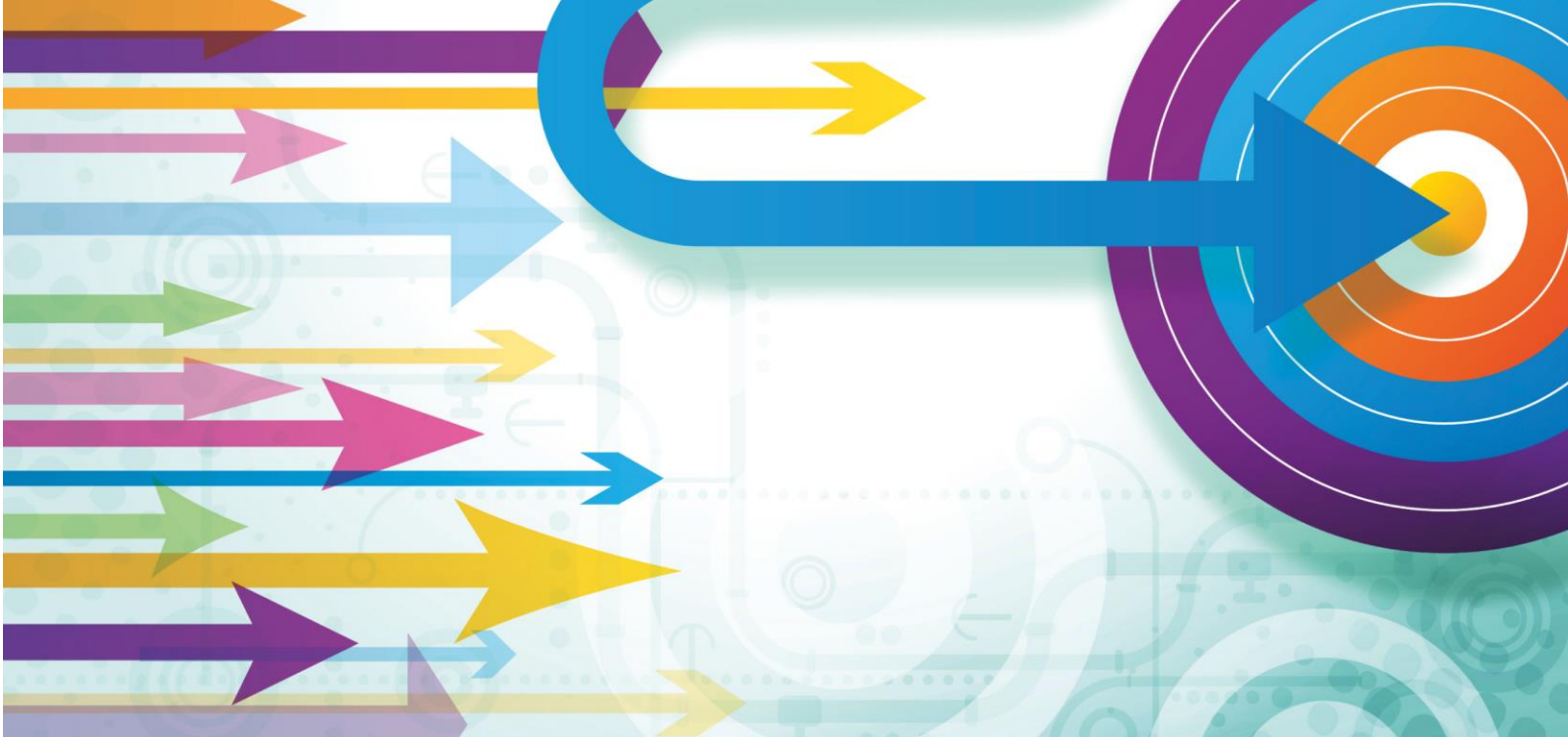# How to…

Complete a Personal Development Review (PDR)

WARWICK

This guide is designed to provide a range of information and tips to support the PDR process. It is aligned to the University's scheme but excludes those employees on clinical terms and conditions who will continue to use their existing framework.

Personal Development Review (PDR) provides a framework to enable all employees to have open and regular conversations with their reviewer about their development, role, contributions, achievements and career aspirations.

This guide is designed to assist both reviewees and reviewers as they prepare for regular conversations around PDR. The principles, tips and techniques described in the guide apply to those who will continue to use the paper-based form during this PDR window as well as to those using the on-line PDR form. For those who will be using the online PDR form, further information can be accessed through www.warwick.ac.uk/successfactors

The form you are expected to use this year is captured in the table below:

Forms to use this year	
Staff group	**Form to use**
Academic	Academic paper form
Professional Services & CCSG (grades 4-9)	Professional Services & CCSG paper form (grades 4-9)
Professional Services & CCSG (grades 1a–3) or where offered by Line Manager	Professional Services & CCSG paper form (grades 1a–3)
SuccessFactors System Users (as identified locally)	PDR on-line form – see www.warwick.ac.uk/successfactors - look out for local communication re when the on-line form will be available

May 2018

Contents

What is Personal Development Review (PDR)?

PDR is designed to be an open, constructive and positive experience for all.

PDR provides a framework to:

- Guide regular, constructive conversations between reviewees and reviewers in relation to an individual's role, development, contributions, and career aspirations
- Align individual contributions and goals to support the aims of department and the wider University

Core principles of PDR

The underlying principles upon which PDR is based follow good practice in the sector and are set out below.

It is anticipated that review conversations will:

- Provide the opportunity for open, constructive conversations between reviewees and reviewers
- Take place at regular intervals throughout the year, rather than solely on an annual basis
- Be informal but allow for structured conversations that encourage open discussion
- Ensure there are no surprises for reviewee or reviewer by emphasising the need for careful, transparent and timely preparation
- Give equal weight to conversations around development, achievements, contributions, and career aspirations
- Lead to the identification of any essential and viable development needs for the reviewee in the short, medium and longer term
- Clarify agreed work goals
- Ensure that the dignity of both individuals in the PDR conversation are provided for
- Be captured in an appropriate format for ease of future reference

Documentation to support PDR

In addition to those colleagues who will be using the online PDR form this year, three paper-based forms will be available for use, each designed to most appropriately reflect the nature of roles and contexts. These can be downloaded from the main PDR page: https://warwick.ac.uk/services/ldc/personal/pdr

Within each of the documents reviewees are provided with individual sections whereby they may record their comments in preparation for discussions with their reviewer. These sections include:

- A review of achievements and contributions during the past year
- A review of development during the past year
- Future goals for the forthcoming year
- Development and support required for the year ahead
- Future work and career aspirations

Equality, Diversity and Inclusion

The University's commitment to Equality, Diversity and Inclusion (ED&I), contained in the Diversity and Inclusion Policy states that:

The promotion of ED&I concerns all of us and is the responsibility of all members of our community. It is expected that we will all contribute to ensuring that the University of Warwick continues to be a safe, welcoming and productive environment, where there is equality of opportunity, fostered in an environment of mutual respect and dignity.

The concept of diversity encompasses acceptance and respect. It means understanding that each individual is unique, and recognising our individual differences. We understand that simply having diversity in our work force and student body is not enough; we must create an inclusive environment where all people can contribute and reach their full potential.

PDR has a significant role to play in encouraging staff to reach their full potential. The University ensures that all staff are offered equal access to PDR and asks each member of staff to familiarise themselves with the scheme and their individual responsibilities.

The Equality, Diversity and Inclusion team are available if any individual wishes to discuss any issue in relation to Equality Legislation or Protect Characteristics, or an issue with regards to ED&I. The ED&I team have implemented a Disability Framework as well as initiatives relating to Charter Marks to ensure inclusion for all staff.

- Disability Framework – Enables an individual to disclose and discuss the nature of their disability and what support (Reasonable Adjustment) might be appropriate with their Line Manager and HR Advisor

- Athena SWAN Charter Mark - Looks at the gender representation in departments at Warwick. Warwick currently holds a Silver Institutional Athena award, with many departments holding or working towards Bronze or Silver awards.

- Race Equality Charter Mark – This Charter aims to inspire a strategic approach to making cultural and systemic changes that will make a real difference to minority ethnic staff.

- Stonewall Workplace Equality Index – is the definitive benchmarking tool which allows us to measure our progress on lesbian, gay, bi and trans inclusion at Warwick.

If prior to your PDR you wish to discuss any of the above, please contact your HR Link Adviser who will be able to confidentially advise you.

Why does the University use a PDR scheme?

Most organisations, including those in higher education, adopt a PDR framework approach. There are benefits in this approach for individual reviewees, for reviewers and for the University.

Benefits for reviewees

PDR provides every reviewee with the opportunity to:

- Take time out to discuss their role and development, career aspirations and any support required
- Review how their development has supported their contribution and impact
- Discuss their achievements and contributions
- Connect individual goals and aspirations for the coming year to the aims of the department and the wider University
- Maintain a record of the conversation and a personal development plan

Benefits for reviewers

PDR provides reviewers with the opportunity to:

- Spend time with individuals to discuss their roles, development, achievements and contributions and aspirations
- Recognise achievements, contributions and review the impact of development through constructive conversations
- Prioritise and plan development needs for the individual and the department
- Ensure that their teams and reports understand agreed goals and aspirations that collectively contribute to the aims of the department and the wider University
- Hear feedback and generate suggestions for enhancing the work of the individual, team or wider University department

Benefits for the University

The University believes that in implementing a PDR scheme it:

- Provides all employees with a voice and a role in the achievements and future development of the University
- Optimises the impact and value of a range of development opportunities to equip employees appropriately for their roles, both now and for the future
- Provides a framework for the consistent review and recognition of development, achievements and contributions
- Ensures clear and effective communication of departmental aims and strategic objectives through regular two way conversations
- Increases reviewee engagement and motivation
- Provides a framework to enable the alignment of goals with those at a team/departmental/University level

PDR frequency

It is anticipated that conversations around PDR will take place on a regular basis throughout the year as part of good working practice. A PDR conversation should take place between May and July of each calendar year as a minimum requirement.

Goal ratings

From 2018, colleagues who work in Professional Services and CCSG and who are using the grade 4-9 form are being encouraged to capture a 'rating' against individual goals. The purpose of this is to provide an objective and consistent approach to discussing the degree to which each goal has been achieved.

Good practice recommends that when goals are discussed and agreed that they are defined in terms of 'what good looks like'. The SMART model (explained more fully with examples on page 13) provides a useful framework to capture such deliverables.

During PDR conversations the Reviewer and Reviewee will be able to compare and discuss 'actual' deliverables against the 'stated' deliverables, selecting the most appropriate rating from the descriptors below to define achievements against each goal. (see page 13)

Goal rating descriptors
* Above expectation - one or more of the agreed deliverables or SMART criteria for **this goal** have been exceeded, and in so doing this provides additional benefit to the team/department
* Meets expectation - **this goal** has been achieved in line with the agreed deliverables or SMART criteria
* Below expectation - one or more of the agreed deliverables or SMART criteria for **this goal** have not been met

When discussing goal ratings you may wish to consider any extenuating circumstances relating to goal achievement and/or instances where priorities may have changed and or new goals introduced.

Where deliverables were not initially specified, you may decide that is not possible to rate this goal and aim to ensure that for all future goals, deliverables are specified in line with the SMART criteria. (page 13)

Roles and responsibilities

Typically, 2 people are involved in the PDR conversation, the reviewee and the reviewer. Occasionally, input may be sought from others with whom the reviewee works closely. Please consider any local arrangements relating to this.

Prior to the discussion, the reviewee reflects on and records their development, achievements and contributions during the period, and an overall summary in preparation for the PDR conversation. Reviewees may also wish to draft thoughts on their future development and goals for discussion in the PDR meeting.

Reviewees then forward the document to their reviewer (5 days before the PDR meeting) to enable reviewers to prepare.

The REVIEWER
The reviewer is the person facilitating the PDR conversation. In many cases this will be the reviewee's line manager. In some cases however (including academic departments), where leaders and managers are managing large groups of staff, Head of Departments can share review meetings among a number of appropriate reviewers. In these cases, reviewees will be informed beforehand as to who will be their reviewer, being someone from their department appointed by the Head of Department. The reviewer may in these situations ask for additional input

from other colleagues who have worked closely with the reviewee to obtain helpful feedback prior to the PDR conversation.

In a rare circumstance where there is a disagreement, the reviewer's line manager or a third party can be asked to be involved in the PDR. Please speak with your HR Adviser if required.

Planning and preparation
1. Agree a date and time for the review meeting, allowing enough time for preparation (usually 2 weeks) and a time for the meeting
2. Refresh your memory of the PDR process and skills. The Moodle and support materials on the PDR website provide some useful guidelines on this.
3. If this is your first PDR conversation with this reviewee, talk through the purpose and process with them and ensure they know you are committed to having a constructive, useful discussion
4. Ensure the reviewee has the appropriate form to complete and has the opportunity to ask any questions
5. Based on the reviewee's previous PDR documentation, consider their development, achievements and contributions during the period. If appropriate gain additional input from other colleagues who have worked closely with the reviewee to obtain helpful feedback prior to the PDR conversation.
6. Consider future work goals for the individual, seeking input from more senior managers and individuals as necessary in order to predict future requirements and changes
7. Complete your part of the PDR documentation as appropriate or access the online PDR through www.warwick.ac.uk/successfactors
8. Anticipate any potential challenges and think through how you will handle them (see section on difficult conversations – page 11)
9. Don't raise any major concerns with the reviewee during the PDR if these have not previously been discussed.   There should be 'no surprises' raised at the discussion.
10. Make a note of any actions that need to be agreed by the end of the conversation.

Practical arrangements
1. Book an appropriate venue for the conversation
2. Ensure there are no interruptions
3. Ensure you are familiar with the department's/school's five year plan and strategic goals and objectives

Follow up
1. Ensure development needs are submitted to the Learning and Development Centre (LDC) team using the appropriate document (see website)
2. Provide your Head of Department with a summary of the development needs identified for those you have reviewed
3. Provide the reviewee with the necessary support and appropriate resources to access agreed development and as agreed with your Head of Department
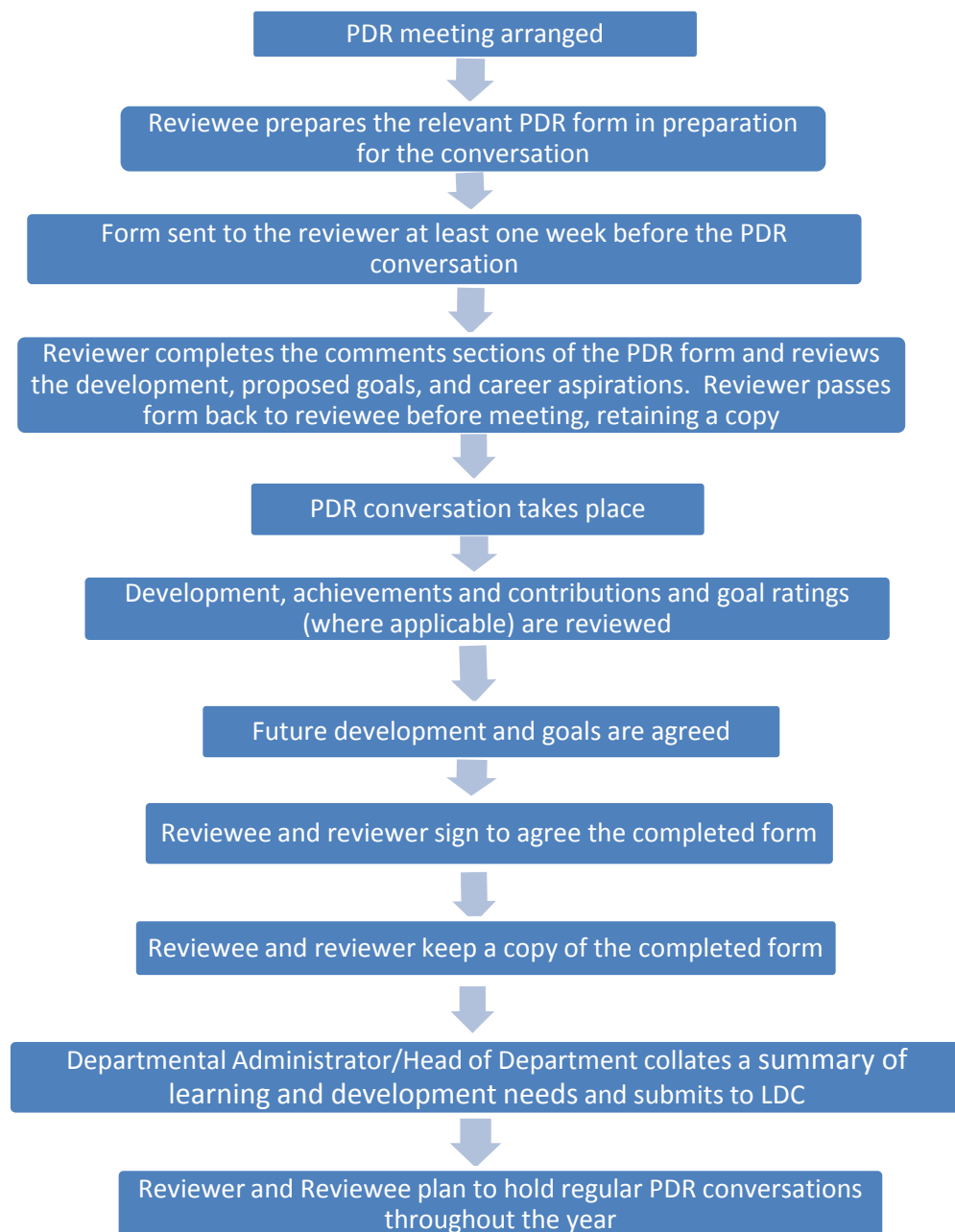
The REVIEWEE

1. Allow yourself sufficient time to prepare for your PDR, meeting the specified PDR timeframes, wherever possible
2. Ensure you complete the necessary parts of the documentation before your meeting, and send to your reviewer one week prior to your meeting
3. Prepare to have a two way conversation
4. State your views constructively and put forward your own suggestions
5. Ask questions if you are not clear about something
6. Be prepared to listen to constructive feedback
7. Reflect on your achievements and contributions from the previous review period and consider any particular things that might have presented and challenge to you during the review period
8. Consider the degree to which each previous goal has been achieved and provide a rating for discussion at the PDR meeting
9. Give thought to the work goals you think are appropriate or would like to achieve for the coming year (or appropriate time frame) – what help do you need to achieve these goals or aspirations?
10. Think about any development or support you might need to help you, either in your current role or for any future role. What support will be the most appropriate and practical for you? Think about a range of development options available to support you
11. Identify how your reviewer could help you achieve your goals, aspirations and development needs

Head of Department

The Head of Department will need to ensure that:

1. All employees are offered the opportunity to take part in PDR and to discuss their development and role
2. Reviewees are made aware of the aims of the department and the wider University to ensure they can appropriately align their personal goals
3. The PDR scheme is organised appropriately in the department to ensure everyone is given the opportunity to have a PDR
4. All reviewers are clear on their role and responsibilities and have had any appropriate 'training' or instructions as required
5. A summary of the departmental development needs are captured and forwarded to the LDC to inform the institutional development plan

PDR process flowchart
(in relation to the paper-based form)

PDR meeting arranged

↓

Reviewee prepares the relevant PDR form in preparation for the conversation

↓

Form sent to the reviewer at least one week before the PDR conversation

↓

Reviewer completes the comments sections of the PDR form and reviews the development, proposed goals, and career aspirations. Reviewer passes form back to reviewee before meeting, retaining a copy

↓

PDR conversation takes place

↓

Development, achievements and contributions and goal ratings (where applicable) are reviewed

↓

Future development and goals are agreed

↓

Reviewee and reviewer sign to agree the completed form

↓

Reviewee and reviewer keep a copy of the completed form

↓

Departmental Administrator/Head of Department collates a summary of learning and development needs and submits to LDC

↓

Reviewer and Reviewee plan to hold regular PDR conversations throughout the year

Please note:
1. Consider any local arrangement relating to this
2. If it is appropriate, you may wish to separate the 'look back' and 'look' forward conversations

Techniques to enable an effective PDR conversation

Ensuring that conversations are constructive

Reviewees who have taken part in PDR briefings report that a PDR conversation is more likely to be productive when you:

a. Ensure you read the relevant parts of the form returned to you by your reviewer, so that you know what they wish to discuss in the meeting
b. Be prepared to discuss your development, achievements and contributions to focus the conversation
c. Are ready to listen as well as offer information, ideas and solutions. This is a two way conversation that should result in a plan agreed by both parties
d. Seek clarification of anything you are unsure of
e. Adopt a joint problem-solving approach where needed

Effective listening

1. Listening is a vital skill involved in effective 1:1 conversations.
2. Experienced reviewers/reviewees typically define the essential pre-requisites of an effective listening conversation as follows:
   a. Choosing an appropriate venue for the discussion
   b. Not allowing outside interruptions
   c. Giving the meeting your full attention
   d. Allocating an appropriate amount of time
   e. Being open to what is being said.
3. Listening is not simply about being silent and allowing the other person to reflect and talk in their own time. Effective conversations occur where both parties are engaged and responsive.
4. Techniques to enable this include:
   a. Testing our understanding of what has been said by asking clarifying questions
   b. Giving or receiving feedback
   c. Summarising what has been said and the point which the conversation has reached
   d. Developing an idea or suggestion in collaboration with the reviewee

How to handle difficult conversations

1. Prior to meeting, it is important that both parties are clear about the agenda for the discussion. This will help to ensure that there are 'no surprises' raised during the meeting
2. If you anticipate that there might be any 'difficult' aspect to your conversation, it is important that you address this prior to the meeting. You may find it useful to speak to an experienced colleague or to your HR Adviser on how to approach the situation
3. You might also find it useful to visit the LDC website to access appropriate support and by reviewing some of the short videos around how to approach a range of scenarios

Goal setting

Drafting goals - Professional Services & CCSG employees

Note Academic staff should refer to the relevant PDR forms for examples relating to their specific areas of focus

1. Drafting goals is a core element of the PDR scheme. Goals are developed and agreed so that the reviewer and the reviewee have a shared understanding of the key focus of work and results which need to be achieved moving forward.
2. Goals must be appropriate to the grade and role of the reviewee and should be set in the context of the aims of the department and the wider University.
3. Individuals may also wish to consider how they will achieve their goals in a way that contributes to creating an environment of dignity, respect and inclusivity. The recent work around Respect at Warwick outlines 8 simple actions we each can take to contribute to creating this environment and are also listed here:

   - Start with the basics – a simple hello or acknowledgement goes a long way
   - Remember we are all different - take time to learn about another person's perspective
   - Be self-aware - think about how you interact, how you come across and consider how your unconscious biases may affect your behaviour
   - Develop your communication skills – do you really listen / do you challenge in a respectful way?
   - Discus what respect manes in your place of work
   - Take time to connect with and support others across the community – you might be surprised what you learn
   - Intervene early – if you see something that doesn't seem right take action, don't let your silence condone inappropriate behaviour
   - Lead with respect – remember as the leader you set the tone for your department

4. It is typical for an individual to have between four and seven core goals. Any larger goals can be split in to sub-goals if that is useful. Effective goals should be written positively and should concentrate on the outcome or result you are seeking.
5. **SMART** is a well-known model used to capture effective goals and stands for:
   > **S**pecific
   > **M**easurable
   > **A**chievable/Agreed
   > **R**ealistic
   > **T**ime bound.
6. SMART goals:
   a. Are consistent with the aims of the department and wider University
   b. Are expressed in positive language
   c. Start with an **action** to ensure they are focussed on something that can be subsequently measured (e.g. complete, publish, investigate, propose, revise, plan, install, design, develop, produce)

Defining goals
When starting to plan your goals, you may find it helpful to consider these questions:
- What is the overall purpose of your role?
- What are the main areas of work or tasks that you perform at the moment?
- What are the tasks and projects you need to work on moving forward?
- Is there anything new coming up?
- How should this work be done? Are there any defined standards set? If not, what standards would you set?
- What are you expected to produce as outputs or outcomes in your role?
- What knowledge, skills and/or behaviours do you need to do this work?
- What support do you need to do this?
- What development needs do you have in your current role?
- What knowledge, skills and behaviours will you need for any future role if the landscape is changing?
- What career aspirations do you have and what support do you need?
- When and how will you measure achievements against your goal milestones?

Examples of SMART goals
Some examples of SMART goals that have been written by staff working in a range of roles are captured below:

Equality, Diversity and Inclusion (ED&I) objectives
Below are some example goals that could be discussed and agreed relating to the ED&I agenda.

General
- Demonstrate positive core behaviours at all times in line with the respect agenda
- Complete the Diversity in the Workplace e-learning training module by the end of X month
- Help out at a least one ED&I event during this calendar year, reporting back to the team to share your knowledge learnt at the event
- Attend at least one ED&I network meeting during this calendar year
- Sign up to receive the ED&I newsletter by the end of this month
  https://warwick.ac.uk/services/equalops/newsletter
- Attend LGBT awareness training during Pride month to enhance your awareness
- Familiarise yourself with the ED&I policy and prepare to share key messages at a team meeting before the end of this term

Leaders/Managers
- Demonstrate positive core behaviours at all times in line with the respect agenda
- Review all processes and standard communications in your own area of responsibility/function by X month to ensure they are ED&I complaint, ensuring these are changed where this is found not to be the case by Y month
- Ensure all of your direct reports undertake the Diversity in the Workplace and Unconscious bias e-learning training modules by the end of x month
- By x month, lead a discussion with your direct reports on the importance of respect in the workplace and what this means for individuals and the team
- Challenge any inappropriate behaviour you experience or witness at the time it takes place

- Model a positive attitude towards equality, diversity and inclusion at all times
- Provide opportunities for your direct reports to participate in all relevant diversity training and events
- Create and maintain a work environment that is respectful of diversity, setting clear expectations of positive behaviours at all times
- Support the delivery of at least one of the Charter Marks, including Athena Swan, RECM, HR Excellence and Wellbeing
- Ensure that ED&I is an agenda item at all team meetings from this point.

Please note, there may be other objectives that could link directly to the University's overall Equality objectives which can found here: https://warwick.ac.uk/services/equalops/equalityobjectives

General goals - Professional Services and CCSG staff
- Ensure that all departmental employees complete the required Diversity and Inclusion training, eg Unconscious Bias by DATE
- To write a procedure to improve the planning, operation and flow of work through the office by DATE and to submit and present the proposal at the X meeting.
- To ensure the website pages on examination regulations are accurately updated by DATE
- To design a work allocation model that ensures agreed core areas of work can be covered during staff absence by DATE
- To implement the agreed procedure on purchasing across the department so that colleagues in the department are fully using the procedure by DATE
- To complete a feasibility study on the implications, costs and impact of adopting a X work model by DATE and write a report for X person/committee
- To increase the satisfaction rating of customers to X% by using the helpdesk by DATE
- To propose an appropriate cleaning schedule to achieve University standards with X staff for the new X building by DATE
- To work with helpdesk reviewees to make recommendations on ways of improving the speed of getting messages to technicians/electricians/plumbers etc. by DATE, Present recommendations to X
- To review the equipment/materials suppliers used for your area and recommend best prices for best products by DATE
- To complete the lab/workshop/department health and safety risk analysis by DATE
- To work with reviewees to sort and tidy the storage area, to remove out of date supplies and to meet health and safety objectives by DATE
- To achieve 95% success rating in cleaning standards in X work area between DATE and DATE
- To collate feedback on workshops within one week of the workshop being run and send by summary to X

Sample goals for staff on academic contracts
For staff on academic contracts the SMART principle may still be adopted as a useful way of capturing the forward looking focus of work.

Individuals may also wish to consider how they will achieve their goals in a way that contributes to creating an environment of dignity, respect and inclusivity. The recent work around Respect at Warwick outlines 8 simple actions we each can take to contribute to creating this environment, they are also listed here:

- Start with the basics – a simple hello or acknowledgement goes a long way
- Remember we are all different - take time to learn about another person's perspective
- Be self-aware - think about how you interact, how you come across and consider how your
- unconscious biases may affect your behaviour
- Develop your communication skills – do you really listen / do you challenge in a respectful way?
- Discus what respect manes in your place of work
- Take time to connect with and support others across the community – you might be surprised what you learn
- Intervene early – if you see something that doesn't seem right take action, don't let your silence condone inappropriate behaviour
- Lead with respect – remember as the leader you set the tone for your department

The following are sample examples of capturing goals and aspirations as outlined in the PDR forms.

Research and Scholarship (applicable to grade and role)
- To submit X grant/contract applications (to the minimum value of X) to X or Y funding bodies in line with Department/University strategy by X DATE in order to obtain £X of income per annum
- To record, monitor and promote eg citations in *X publication* by Y DATE
- To publish X research papers and/or *X/peer review* journals considered by the University to be REF level X or above by DATE (Note REF applicability to independent researchers)
- To submit *X number of* abstracts/conference papers/conference presentations by X DATE
- To *work towards/attain/maintain national/international* recognition in field by publishing research outcomes *and attending/presenting* at a *national/international* conference over the next x months
- To hold *regular* team meetings each *term/month* for the *X* project/grant in response to needs
- To continue to update knowledge, understanding and networking, for eg personal and professional development within the field relevant to your area of operation by attending *workshops/conferences or seminars* across the next calendar year
- To enhance focus on development this year in X field e.g. Leadership
- To increase influence and research through widening participation or public engagement over the next calendar year, eg interesting citations, raising awareness, dissemination of findings, policy to practice or public profile
- To increase research impact activities over the next calendar year, providing specific measurable examples
- To increase/achieve engagement in collaborations and collegiality, providing specific measurable examples of impact

- To evidence research-based innovation in learning and teaching
- To produce X teaching related publications (journals, textbooks or conferences)
- Engage in research and related continuing professional development e.g. open access, research data management, research integrity
- To undertake online research integrity training or face to face training by x month

Teaching and Learning
- To demonstrate through student evaluation data an average satisfaction score of X for all modules that you are responsible for throughout the academic year
- To achieve an improvement in student satisfaction scores from X to a minimum of Y by DATE
- To develop a module for the undergraduate/postgraduate degree in X for approval/validation by the University by DATE
- To observe and give constructive feedback on the teaching practices of X colleagues per year for the next academic year
- To review the content of and learning approaches used in delivering X module by DATE and revise appropriately to enhance effectiveness
- Engage in teaching and learning related continuing professional development
- To supervise (as principle/co/joint supervisor) X students to successful completion of their PhDs by X
- To undertake an internal/external professional development course (recognised by X) in research supervision in this academic year

Impact, Outreach, and Engagement criteria
- To peer review relevant publications (journals, conferences, academic programmes or modules)
- To participate in external activities that have a positive reputational impact (for example engagement with local schools, businesses, cultural organisations, community networks etc.)
- To contribute/lead on National or international student recruitment activity
- To actively engage with the University's international activities and partnerships

Collegiality, Leadership, Management criteria
- To produce supervisor/student guidelines which are in line with University regulations for the department by DATE
- To allocate X hours to support/mentor X new probationers in the current/next academic year
- To establish collaborative partnerships with department X, Y, Z for the delivery of cross disciplinary module in X aimed at (specific target group) by DATE
- To take up membership of X departmental committees
- To enhance the operation of the department (eg Recruitment and Admissions, Senior Tutor, new programme development, major research networks etc)
- To act within the department as a champion for initiatives such as student surveys (NSS, PTES, PRES etc), staff & student wellbeing etc
- To coach/mentor x number of colleagues during the next academic year

- Lead on a successful departmental engagement with external schemes such as Athena Swan Awards and HR Excellent in Research during the next academic year

Please note:
Further to recent consultation and communication, the criteria/evidence for Academic Promotions has been revised. You may wish to review this when considering your forward looking goals. Further information can be found on the Academic Promotions webpage
https://warwick.ac.uk/services/humanresources/internal/academicprocesses/academicpromotion

Planning and prioritising development needs

What is a development need?
Individuals may have a gap in their skills, experience, or approach to work that could be enhanced or developed to support the individual in:
   a) Achieving their work goals
   b) Improving their contribution
   c) Fulfilling their potential and career aspirations.

In addition, a gap may become realised due to a change or development in their area of work. Individuals may need to gain a new skill, enhance their knowledge or to change their approach in order to remain successful in the future.

There are finite resources and it is unlikely that every development opportunity requested will be fulfilled. Reviewers therefore have a responsibility to:
   a) Understand the skills and expertise needed by reviewees and teams to achieve departmental priorities and key objectives
   b) Identify any skills and experience gaps that are essential to enable and support individuals to carry out their roles effectively, now and in the future
   c) Write a SMART goal for the development need in order to ensure clarity
   d) Think about the full range of development methods available to support individuals which might include: on-job training, eLearning, DVDs, CDs, coaching, mentoring, peer observation, forums, conferences, job shadowing, reading, involvement in a project, secondments, as well as formal training workshops
   e) Discuss the above with reviewees to identify the most appropriate methods of support for that person
   f) Choose the most appropriate and effective development method(s), considering the best 'value for money'
   g) Prioritise development that is critical to the achievement of agreed goals

Whose responsibility is it to make development opportunities happen?
It is important that reviewees own their development plans, take responsibility for making development happen, and for reporting back on the outcomes of their development.
It is the reviewer's responsibility to ensure that individuals:
   a) Are given the support and appropriate resources to access agreed development
   b) Review and report on its effectiveness
   c) Use what they have learned to enhance their contribution in their role
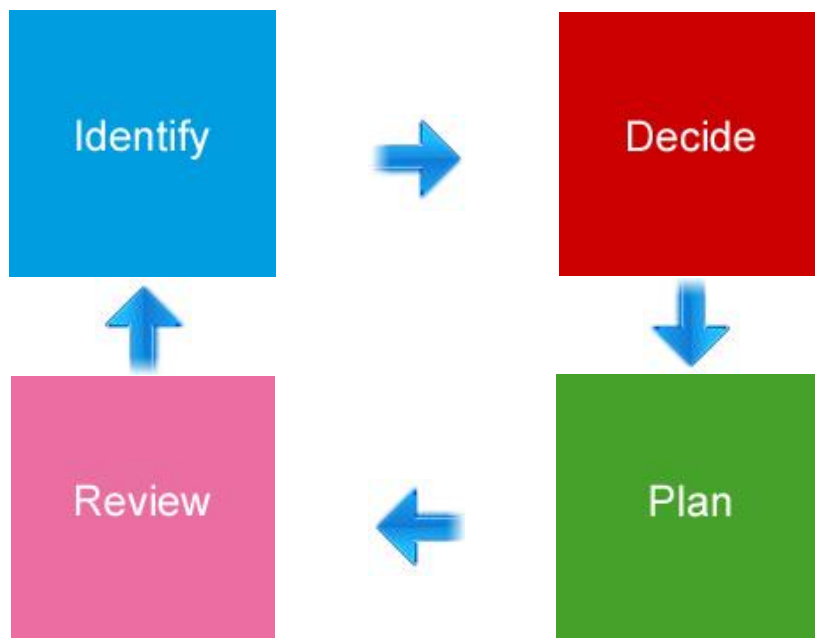
Planning your development
If you need further support around planning and meeting your development needs, this section may help you

Why is development important?
Whether you need to take on new challenges, keep on top of developments in your field, plan your career progression or enhance your profile, undertaking development can help. By ensuring you have the right balance of knowledge, skills and behaviours, you can achieve your goals. Warwick is committed to supporting the development of its employees.

How do I work out my development needs?
Your development needs are unique, and to ensure you progress in the way you need, it's worth thinking through your approach. The LDC offers a range of ideas and opportunities to help individuals develop. There are many development opportunities, both in your workplace and outside. The step-by-step approach below may help you arrive at an effective personal development plan.

Identify your development needs
Identifying your development needs can be challenging. Often, we find ourselves looking at simply what training courses are available and deciding which of those would be most helpful. In fact, it is better to try and identify what the development need is and then to work out ways of meeting that need, which may or may not be a training course.

PDR provides a great opportunity to discuss your development needs with your reviewer/line manager. You may be able to discuss the changing requirements of your role, as well as your personal development aspirations. It is important that you have considered your core development needs before your PDR meeting as this will enable you to make the most of your discussion. See links here for tips on **Career planning**:
http://www2.warwick.ac.uk/services/ldc/personal/careerprog/
http://www2.warwick.ac.uk/services/ldc/researchers/opportunities/

Identify what skills, knowledge and behaviours are 'required' for you to do your job well
Every role in the University has a job description and a person specification. Your job description will list the things that you are expected to do. The person specification will identify the skills, experience, knowledge and behaviours that you need to do that job well.

You may find it helpful to talk to your line manager or Head of Department if you feel you want to clarify any of the requirements set out in the person specification. Your PDR meeting will provide one opportunity for you to have this discussion, but you can discuss your development needs at any meeting with your reviewer, line manager or Head of Department as appropriate during the year.

At this stage, it's also worth thinking about the skills, knowledge and behaviours that you may need to develop in the future for your current job. You may know, for example, that your role will be changing or that you will be working on different projects or that you are interested in a career change. What new or different skills, knowledge and behaviours will you need?

Make a list of your current and future requirements
Make a list of current and future skills, knowledge and behaviours that you need. Look at the skills, knowledge and behaviours you actually have now. Look at the list you have produced. Now ask yourself how effectively you match against each one. You could consider talking this through with a friend or colleague, or with your line manager or Head of Department.

It is important to reflect and to be honest with yourself. Are there areas of your work, for example, where developing more confidence would make a real difference to your success? Are there knowledge, skills and behaviours that you occasionally need on occasion that would benefit from some development? Can you identify areas where you feel confident and capable but where these areas could become even greater strengths for you with some further development?

Compare 'actual' with 'required' to identify any gaps. These are your development needs
Try and be as specific as possible about what you need to do differently. It is best practice to write a SMART goal. This will really help you when you are deciding how to best address your development needs. It will also help you review and measure your success/progress.

For example, "I need to learn how to use Outlook to sort, prioritise and store my emails," will be much more helpful than "I need to be more organised," when it comes to deciding what development you need. It will also help you check how the Outlook training you undertook actually made a difference in your ability to be organised.

Practicalities

It is worth thinking about the practicalities, such as cost, timescales and urgency of the development need at the outset. How much funding is likely to be available and what solutions are available and when, will all have a bearing on how the needs are met. If you are asking your department to fund the cost of your development, remember that your line manager and Head of Department will need to consider your request in light of budgetary restrictions and within the wider development needs of the department. This may mean that your preferred option may not be feasible, so it might be helpful to consider a number of ways of meeting the identified development need where possible.

How do I prefer to learn?

Think about how you prefer to learn or how you learn best. For example, do you learn most successfully observing, trying things out, reading, listening, discussing, reflecting, researching or questioning? Think about the times when you have successfully learnt something, and try to identify what it was about the experience that helped you learn effectively. You might find it helpful to think about a time when you didn't learn well and compare it to a more successful experience to identify what it is that makes learning work for you. Most people learn work related skills from other colleagues and it is important to practice the new skill soon after learning in order to remember it and to refine the skill.

Finding the best solution

Remember to start by identifying what it is that you need to learn. Try to be as precise as you can. What is it that you need to do differently? Make sure that the development you choose will result in the change you need. If you are thinking about a course, check the content and learning outcomes advertised and then review these against your development need. How well do they match?

Remember to consider all the options to make sure you don't miss the right opportunity. This may not always be a course or a formal training session. Think about the range of development methods available to support individuals which might include: on-job training, eLearning, DVDs, CDs, coaching, mentoring, peer observation, forums, conferences, job shadowing, reading, involvement in a project, secondments, formal workshops.

Develop a plan

By producing and recording a development plan, you are much more likely to achieve the goals you have set yourself. Your PDR conversation provides a good opportunity to produce or review your plan.

You will need to consider:
  a) **What do I need to learn?**
     These are your development goal details, the knowledge, skills or behaviours that you identified as part of this process

b) **How will I do this?**
   These are the development methods or solutions that you selected in the process
c) **By when?**
   When do you aim to complete each activity? Prioritise the most important and consider what is manageable for you in terms of time commitment
d) **Measuring success**
   Think about how you will know that the development has worked. What will you be doing differently for example?

Review and record progress

Reviewing and recording your progress means you can track your development. A personal development plan in a format of your choosing is useful for recording what you have learned compared to what you planned. This will help you prepare for your PDR conversation, revise your CV or apply for new roles.

You may also find that you develop skills, knowledge or behaviours that you didn't plan for, perhaps because new opportunities have come your way in your role. And don't forget that development can happen in informal ways such as reading, networking and on the job training. It's worth recording all of these on your plan too. In this way, your plan becomes a record of your ongoing growth and progression and celebrates your achievements.

Remember to make time to regularly review your personal development plan. As you complete learning, you need to start thinking about the process of planning your development again. Work contexts are evolving all the time and this inevitably means that your roles and priorities will change, with a resulting impact on your development needs. You may also have career aspirations that will encourage you to think about your development needs. Developing yourself opens up new opportunities for both you and the University.

How are learning and development needs met and summarised?

1. Reviewees are responsible for working with their reviewers and employees to ensure that what has been agreed is implemented. At your PDR discussion, you should make sure that you are clear on how agreed development needs are going to be met and what you need to do to make them happen. If there are development needs which need higher approval, then this should also be recorded and it should be clear who will action seeking approval. Ultimately, you are responsible for your own development.

2. After your PDR, your reviewer will summarise non-attributable development needs from the reviews they have conducted. These will be passed to your Head of Department who will collate them into an overall summary. Where development needs require additional support, perhaps from the Learning and Development Centre (LDC) the Head of Department will ensure that LDC receive a copy of this summary.

Specific development for Academic staff

For academic staff the development needs are likely to be identified from the following examples/practices:

1. Feedback from students
2. Peer review/peer observation
3. Gaining professional recognition (eg Fellowship of the HEA or equivalent)
4. Development arising from the setting of an objective, e.g. developing and leading the validation of a new module for the first time
5. Writing publications, grant applications, impact cases, project management etc
6. Identification of areas of practice that the individual considers they need to develop or enhance
7. Changes to the requirements for curriculum design/content/delivery/assessment etc.
8. Changes arising from innovation, technological developments, developing international activity etc.
9. Opportunities arising to collaborate on/aspiring to engage with in the future for which they will need some development

Useful links:
https://warwick.ac.uk/services/ldc/teaching_learning/coursedirectory/
http://www2.warwick.ac.uk/services/ldc/teaching_learning/app/exp

Further information and support

You may find it useful to refer to the LDC web pages where you will find information on a range of self-directed learning guides. If you have any specific questions about PDR, please speak to your HR Adviser in the first instance.