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| RDaSH-NHS-FT-Full-Colour-Logo.pngPersonal Development Review (PDR) | |
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**Personal Details**

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| **Name of employee:** | **Job Title:** |
| **Name of reviewer:** | **Date of PDR:** |

**Section 1.1: What has been expected of you this year?**

Here you need to review progress against objectives agreed at last year’s performance appraisal, determining whether the achievement of the objectives overall have **Exceeded Expectations**, **Met Expectations** or **Needs Improvement**.

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| **Measurement of performance against SMART OBJECTIVES** | |
| **What was expected of you? Specific, Measurable, Achievable, Relevant, Time-bound** | **How did you do?** |
|  | **Achieved** |
|  | **Achieved** |
|  | **Achieved** |
|  | **Achieved** |
|  | **Achieved** |
|  | **Achieved** |

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| **Employee’s comments** | | | | | | | |
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| **Manager/ Reviewer’s comments** | | | | | | | |
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| **Overall Objective rating**– **Has the employee completed their objectives?** |  | **Needs Improvement** *None/some objectives completed* |  | **Met Expectations** *Most/all objectives completed* |  | **Exceeded**  **Expectations**  *All objectives completed and some exceeded* |

**Section 1.2: Review of Previous 12 months**

In addition to your objectives in Section 1.1, please outline any other **successes /achievements** you have accomplished as well as any **challenges** you have experienced over the previous 12 months.

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| **Employee’s comments** |
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| **Successes / Achievements** – please highlight any areas of work which you feel have been successful over the last twelve months. What has been your greatest achievement this year and why?  **Challenges –** what has been your greatest challenge this year? Is there anything you would have done differently and what have you learnt from this? |
| **Reviewer’s comments** |
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**Section 1.3: Reflect on the Trust values and how they positively influence your actions**

What do the Trust values mean to you? How do you apply them in your working life each day at RDaSH?

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| **Employee’s comments** | | | | | | | |
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| **Manager / Reviewer’s comments** | | | | | | | |
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| **Overall Rating for Values and Behaviours** – What overall rating has the employee achieved? |  | **Needs Improvement** Rarely demonstrates Trust Values in their behaviour |  | **Met Expectations** Mostly demonstrates Trust Values in their behaviours |  | **Exceeded Expectations** Always demonstrates Trust Values in their behaviour |

**Section 1.4: Essential Skills and Mandatory Training**

Colleagues must be up to date with all Essential Skills and Mandatory Training to receive pay progression.

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| **Are you in date with Statutory and Mandatory Training?** *Refer to Skills Matrix (ESR)* (E-Learning and Face to Face training) | **All in date** |
| **Not in date** |
| **Are all of your colleagues in date with Statutory and Mandatory Training?** *If applicable* (E-Learning and Face to Face training) | **All in date** |
| **Not in date** |
| **Clinical colleagues: Have you completed your preceptorship programme?**  *It is a Trust requirement that on entering the Trust all newly registered and new to area / role employees complete the multi professional preceptorship programme.*  *The employee/reviewer must confirm that they have completed this programme and the self-serve administrator informed to reflect this completion on their matrix preceptorship competence.* | **Completed** |
| **Not Completed** |
| **If not complete set date for completion & notify ESR self-service administrator when complete** | **Date:** |
| **Comments:** | |
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| **Medical Device Training** | |
| As part of my PDR, I have discussed my competence on the medical devices I use within my role. | Yes  No |
| I require additional training on medical devices so that I am competent to use them.  *(If ‘yes’ please continue to next question.)* | Yes  No |
| I have identified the following medical devices I require further training on. |  |

**Section 2: Overall Performance Score**

Manager / Reviewer to consider ratings from Section 1 to issue an overall performance grade to be recorded on ESR.

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|  | **Exceeded Expectations** | * Has received at least one rating of Exceeded Expectations * Has not received a rating of Needs Improvement * Has completed all Statutory and Mandatory training |
|  | **Met Expectations** | * Has received two ratings of Met Expectations * Has completed all Statutory and Mandatory training |
|  | **Needs Improvement** | * Has not completed all Statutory and Mandatory training *or* * Has received one or more ratings of Needs Improvement |
| NB. Performance Management to occur in accordance with policy and a plan for the completion of essential and mandatory training within 4 weeks is required. | | |
| Colleagues scoring ‘Needs Improvement’ will not receive their pay step progression.  **If Employee scored ‘Needs Improvement’, reference to the performance policy may be useful** [Performance (Capability) Management Policy and Procedure – RDaSH NHS Foundation Trust](https://www.rdash.nhs.uk/performance-capability-management-policy-and-procedure/) | | |

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| **Discussion:** *Please use this space to document any discussion / support required* |
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**Section 3.1: Talent, Career Planning and Professional Requirements**

The focus of this section should be on your potential and aspirations for future career development, along with your professional registration requirements.

**Employee to complete:** Thinking about your current role, your life and your career are you…

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|  | **Unsure of this role… I’m new to the role or this may not be the right role for me** |  | **Content with this role... I just want to do this role well** |  | **Content with this role... I want to develop further within this role** |  | **Ready for more… I want to be challenged further or take the next step in my career** |

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| Why have you chosen the option you have? | |  | | | |
| What do you like / dislike about the current job you do & why? | |  | | | |
| What support do you need from your manager, the team or the organisation to fulfil your potential? | |  | | | |
| What Training and Development have you undertaken this year? | |  | | | |
| **Following discussion, what was agreed regarding your readiness to progress?** | | Now | 1 Year | | 2 to 3 years |
| **Have you completed the annual declaration of interest?**  *(All Band 8b or above)* | | Yes | | No | |
| **Have there been any changes to your suitability to practice?** | | No Changes | | Changes | |
| *This could include police cautions, convictions, investigations following allegations, investigations or proceedings by a regulatory or licensing body or any prohibition, limitations or restrictions that could affect your position or the reputation of the Trust.* | | | | | |
| **Comments:**  *(If there has been any changes to your suitability to practice, please use this space to document any discussion on how your job role has changed)* | | | | | |
| **Clinical and Professional Requirements needed for your role** *(if applicable)*  *Ensure Code of Conduct of relevant professional body is available at meeting*  Manager / reviewer to check that employee is working towards re-registration / Revalidation.  Use Objectives section to ensure appropriate preparation for re-registration.  Ensure professional portfolio is up to date. | *(i.e., proof of up-to-date PIN, registration with GMC, NMC, HCPC or GPC as appropriate and CPD – plans for the coming year):* | | | | |
| **Date of Re-registration / Revalidation** |  | | | | |

**Section 3.2: Health and Wellbeing**

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| **Do you have any caring responsibilities outside of work?** | Yes | No |
| **Is there any support you require?** | Yes | No |
| **Are you aware of the assistance available to support carers in the workplace?** (*Flexible working, carers leave, occupational health support, employers for carers membership, local carer services, amended duties, Employee Assistance Programme)* | Yes | No |
| **Is there anything else in terms of your health and wellbeing that requires support?** | Yes | No |

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| **Details of additional support required:** |
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**Section 3.3: Objectives for the year ahead**

Consider, together with your Manager/Reviewer, how you can support the Trust Objectives (see Appendix A) and / or Team objectives when setting your individual goals.

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| **Team Objectives** What are the team / department’s primary objectives this year to support the Trust Objectives? (see Appendix A) |
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| **Individual SMART Objectives – Specific, Measurable, Achievable, Relevant and Timescale** | | | | | | |
| **S** | **M** | **A** | | **R** | **T** | |
| **Specific** | **Measurable** | **Achievable** | | **Relevant** | **Timescale** | |
| **Define the goal as much as possible** | **How will you know you have achieved your goal?** | **Work towards a goal that is challenging, but possible** | | **Is your goal worthwhile and will it meet your needs?** | **When will you aim to achieve the goal by?** | |
| Individual **SMART** Objectives | | | How will you measure whether you have been successful? | | | Timescale – add a date for completion |
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**Section 3.4: Personal Development Planning (PDP)**

The PDP underpins and supports you in fulfilling your job role, the delivery of objectives, career aspirations and values and behaviours. Do you need any additional training and / or support put in place to help achieve the outcomes of this PDR?

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| **Personal Development Plan:**  Please refer to information about the training and support available from the Trust (See Learning and Development section on Trust Intranet). Please also consider shadowing, projects, research, coaching/mentoring as well as formal training opportunities. |
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| **Employee’s Signature:** | |  | **Date:** |  |
| **Manager/Reviewer’s Signature:** | |  | **Date:** |  |
| |  | | --- | | Colleagues scoring ‘Needs Improvement’ will not receive their pay step progression. |   **If Employee scored ‘Needs Improvement’, reference to the performance policy may be useful** [Performance (Capability) Management Policy and Procedure – RDaSH NHS Foundation Trust](https://www.rdash.nhs.uk/performance-capability-management-policy-and-procedure/) | | | | |
| **Manager /Reviewer Checklist** | | | | |
|  | **Inform Pay Services in relation to pay step progression** | | | |
|  | **Set the dates for supervision and next Performance Appraisal** | | | |