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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?** | [x]  | **Needs Improvement** *None/some objectives completed* | [x]  | **Met Expectations** *Most/all objectives completed* | [x]  | **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:** |  |
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| 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** |