Rotherham Doncaster and South Humber NHS Foundation Trust

Personal Development Review (PDR) Policy

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1. Document summary

1.1 What is this policy about?

This policy is about Personal Development Reviews. These are also called PDRs.
A PDR is a meeting about your work, your progress and your development.
The policy is for Trust colleagues employed under Agenda for Change terms and conditions.

1.2 What happens at a PDR?

You meet with a trained reviewer. This will usually be your line manager.

- Talk about what has gone well.
- Talk about your health and wellbeing.
- Check your training and learning.
- Talk about your career and future development.
- Agree clear goals for the year ahead.

1.3 When should a PDR happen?

- You must have a PDR at least once every year.
- Your reviewer should give you at least four weeks' notice.
- You should also talk about your progress during supervision meetings through the year.

1.4 The process

The process has four stages: a joint review of work; an agreed Personal Development Plan; completion of learning and development; and joint evaluation of the effect of that learning. Progress should be discussed during supervision throughout the year. The full PDR form is used for colleagues at Agenda for Change Band 3 and above and for Band 2 colleagues who want a career development discussion. The short form may be used for other Band 2 colleagues.

PDR information must remain confidential and be accessible only to those who need it for the review and management process. Where there is a disagreement, the policy provides for an independent review or use of the Trust's Grievance and Dispute Policy. The appendices provide definitions, links to the full and short PDR forms, the Trust's Values and Behaviour Framework, and the Career Conversation Feedback Summary Form.

2. Introduction and aim

The RDaSH Personal Development Review (PDR) process helps the Trust meet its objectives. It puts our values and behaviours at the centre of how we work.

The Trust will give every colleague the chance to develop the knowledge, skills, abilities and behaviours needed for their role. The PDR process identifies personal development needs, career goals and talent, and agrees how these will be supported.

It is essential that all employees have:

- A clear job description and person specification

- A clear understanding of the mandatory and statutory requirements of their role
- Access to suitable training, development and talent management opportunities
- Clear objectives linked to the Trust's objectives
- An understanding of the Trust's Values and Behaviour Framework (Appendix 4), with opportunities to show how they apply it during supervision and PDR discussions

The **Personal Development Review (PDR)** looks at how the post holder is developing in their role. It covers:

- Their duties, responsibilities and agreed objectives
- How they use their knowledge, skills, abilities and behaviours at work
- Any development needs and longer-term career goals
- How the Trust's values influence their work (Appendix 4)
- Their health and wellbeing

The PDR reviews how the post holder uses their knowledge and skills and develops to meet the requirements in their job description and person specification. It brings together the supervision and progress discussions held during the year so that the post holder and reviewer can reflect on progress.
Objectives should relate to the main responsibilities of the role and any agreed improvements or changes for the next year. They should reflect the values and behaviours in Appendix 4, be recorded in the PDR form and be SMART: specific, measurable, achievable, relevant and time bound. Objectives must suit the person's role. As a guide, there should be no more than 10 objectives in one year.

Appendix 2 – Personal Development Review should be used for colleagues at Agenda for Change Band 3 and above. It should also be used for Band 2 colleagues who want to discuss career development.

Appendix 3 – Personal Development Review- Short Form should be used for colleagues at Agenda for Change Band 2 who do not need the full form.

PDR is an opportunity to demonstrate that we value everyone's contribution. In line with The NHS People Plan RDaSH is introducing a more systematic and structured approach to succession planning and talent management which will complement the PDR process.

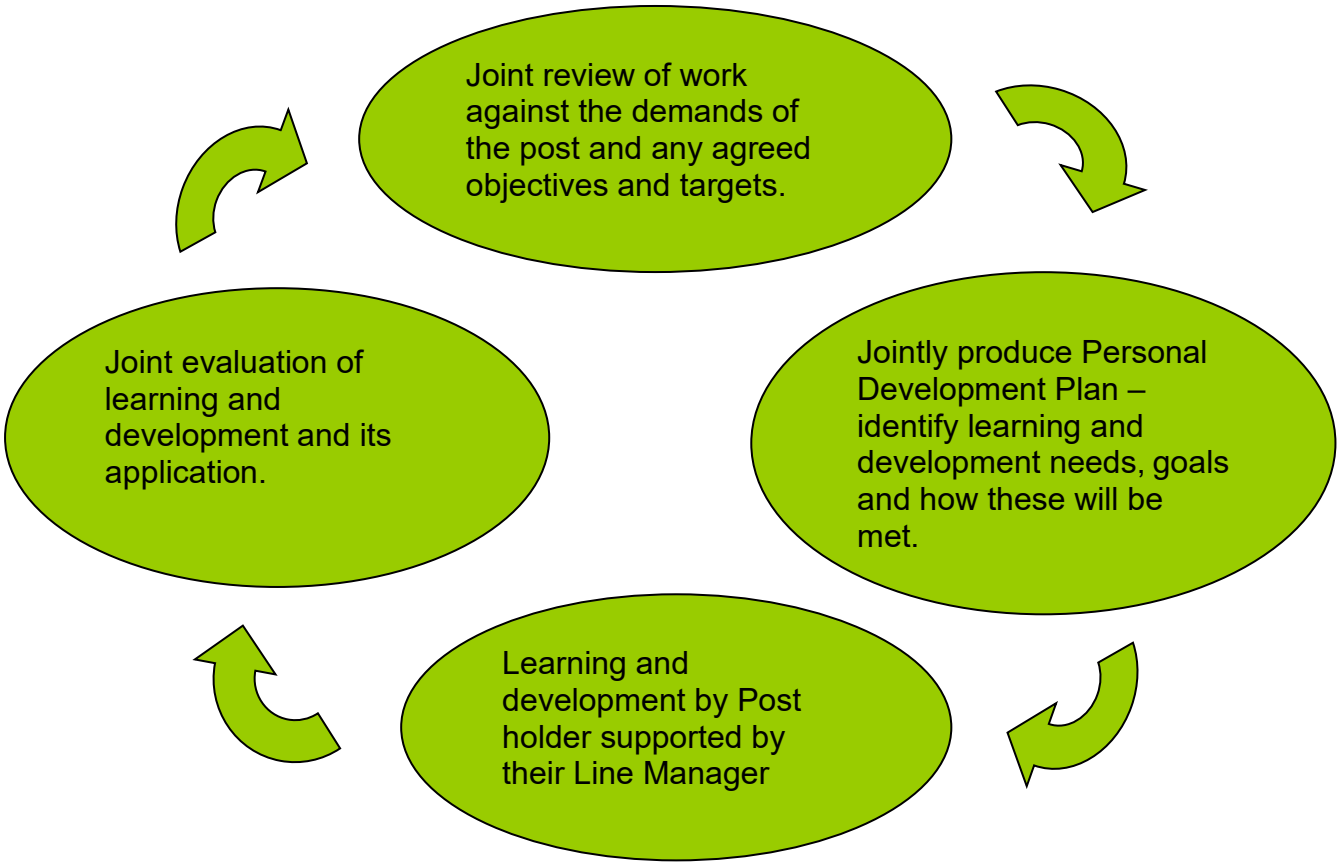
As part of our approach, it is recommended that line managers start to engage all staff in career conversations using the maximising potential conversation tool and documenting conversations using appendix 5 – Career Conversation Feedback Summary.

3. Procedure

The PDR process is mandatory. It supports, but does not replace, regular supervision and progress discussions between managers and colleagues throughout the year.

A PDR must take place at least once a year.

The PDR process consists of four stages:



3.1 Stage 1 Joint Review of Work

This takes place between the Post Holder and a Reviewer who will normally be their Line Manager.

The reviewer will normally be the line manager. A recruiting manager may appoint another reviewer where the line manager has too many direct reports, specialist input is needed, or there is a clear reason why the line manager should not carry out the review. The recruiting manager should discuss this with the post holder and aim to agree a suitable alternative. The reviewer must have completed PDR reviewer training.

The basis for the PDR will be the reviewing and setting of objectives, accompanied with the reviewing of the knowledge, skills, capability and behaviour requirements of the post.

The PDR process will take place throughout the year and should be reviewed within your supervision discussions to ensure you are on track to meet your objectives.

The Post Holder should complete the PDR documentation (as identified in the guidelines) prior to the review to assist with the process.

The Post Holder will also consider the impact on their work of the learning and development undertaken since the last PDR. The individual's mandatory and

statutory training matrix will be reviewed to ensure the Trusts' training requirements are being met.

The reviewer must record the outcome on the relevant PDR form (Appendix 2 or Appendix 3) and link it to Preceptorship or Care Certificate records where needed. The completed form must record progress and agreed learning and development needs. The post holder and reviewer must each keep a copy. If the reviewer is not the line manager, the line manager must also receive a copy.

3.2 Stage 2 Joint Personal Development Plan (PDP)

The Stage 1 review leads to an agreed personal development plan in Section 3 of the PDR form. The plan covers:

- Talent, Career Planning and Professional Requirements
- Health and Wellbeing
- Objectives for the year ahead
- Personal Development Planning

Section 3 must record the objectives agreed during the PDR, how they will be achieved, the support needed and the target timescale.

3.3 Stage 3 Learning and Development.

Learning and development help the post holder build the knowledge, skills, abilities and behaviours needed for their work and future development.

The training and development plan must record the post holder's agreed learning needs and requests. It should include target dates, usually before the next PDR. Progress must be reviewed during supervision discussions.

3.4 Stage 4 Joint Evaluation of Learning and Development

At this stage, the post holder and reviewer consider whether learning and development have improved the post holder's knowledge, skills and work. The findings should inform supervision and the next PDR, so learning and development continue throughout the year.

The Trust provides PDR training for all colleagues who have the responsibility of reviewing others (Reviewers) who have not previously been trained in this area. It is compulsory for colleagues taking on responsibility for reviewing others to attend this training programme. Training workshops will be delivered throughout the Trust for all Reviewers.

The Trust will provide a variety of educational, learning and development activities to assist the Post Holder's learning needs identified in the PDP and Training and Development Plan. Information is available to Service Managers, Reviewers and Post Holders via the Trust's Learning and Development Programme and on the Trust's Intranet.

This policy assumes that sufficient time is built into the working arrangements of all colleagues to enable the PDR process and associated training to take place.

HR will be informed by the Reviewer if a Post Holder scores 'Needs Improvement' as they will not receive their pay step progression.

3.5 Confidentiality

The post holder and reviewer must keep PDR information confidential. Access should be limited to the post holder, the reviewer, any agreed designated reviewer and the recruiting manager.

PDR documentation should be kept in a secure place in line with the Trust's policy on Data Protection.

The reviewer is responsible for ensuring that the PDR review date is recorded on the Electronic Service Record (ESR). This information is a requirement of Department of Health for the monitoring of the PDR process.

3.6 Disagreements

If there is a disagreement about the PDR process, the following arrangements apply.

The recruiting manager and post holder may ask a mutually agreed third person to carry out an independent review. That person may ask everyone involved for more information. If both parties agree to this approach, the outcome of the independent review will be final.

If the dispute concerns the Post Holder objecting to his/her Line Manager undertaking the review, then the Recruiting Manager will assess the reason(s) for the objection and determine whether an alternate Reviewer will be identified.

If the post holder does not accept the outcome of the review, they may use the Trust's grievance procedure. They may also seek advice or support from their trade union or professional organisation. See the Grievance and Dispute Policy for more information.

4. Responsibilities

The Personal Development Review (PDR) is a Trust mandatory requirement for all colleagues subject to Agenda for Change terms and conditions.

This policy applies to all Rotherham, Doncaster and South Humber NHS Foundation Trust colleagues employed under Agenda for Change terms and conditions. It does not apply to Board-level directors, doctors, agency workers, contractors or others who are not covered by Agenda for Change. Separate review arrangements apply to these groups.

4.1 Employees are responsible for:

- Preparing for the PDR and attending at the agreed date and time, with their mandatory and statutory training record available
- Understanding the PDR process and attending a PDR awareness session if needed
- Telling their line manager if they have not had an annual PDR

- Meeting any professional registration or revalidation requirements and using the PDR to reflect on practice, discuss evidence and seek feedback
- Using supervision discussions from the year to help complete the PDR
- Taking part in and completing Preceptorship or the Care Certificate where this applies

Employees should be aware that if they score 'Needs Improvement' they will not receive their pay step progression.

4.2 Reviewers are responsible for:

- Giving the post holder at least four weeks' notice and ensuring the PDR takes place at the agreed date and time
- Making sure every post holder in their area has an annual PDR
- Completing PDR reviewer training before carrying out a review
- Explaining the process and responsibilities to the post holder and being familiar with their performance and role requirements
- Completing the correct PDR form and linking it to Preceptorship or Care Certificate records where needed
- Making sure the post holder and reviewer keep copies, and that the line manager also receives a copy if they are not the reviewer
- Seeking Human Resources advice if agreed changes to the job description may affect the job evaluation
- Telling Human Resources if a post holder receives a 'Needs Improvement' rating, because this affects pay step progression

4.3 Line Managers

Line managers are accountable for:

- Meeting new starters within three months after they complete corporate and local induction to discuss objectives and the annual PDR
- Providing fair access to the resources and support needed for agreed learning and development
- Making sure reviewers are trained and able to carry out the role
- Arranging PDR discussions during normal working hours or agreeing time off in lieu
- Keeping PDR records up to date for their care group or directorate and making sure completion dates are entered on the Electronic Staff Record (ESR)
- Including Preceptorship for registered colleagues and the Care Certificate for unregistered clinical colleagues where relevant

4.2 Care Group Senior Leadership Teams

Care Group Senior Leadership Teams must create a culture in which all colleagues take part in PDR. They must also make sure colleagues have enough time to prepare for and complete their PDR responsibilities.

5. Training

5.1 Update on policy

- This one-off update is for all colleagues. The Learning and Development Team will provide it by video or podcast.

5.2 Update on ESR process

- This one-off ESR process update is for reviewees. The Learning and Development Team will provide it by video or podcast.

5.3 Update on ESR process

- This one-off ESR process update is for reviewers. The Learning and Development Team will provide it by video or podcast.

6. Monitoring Arrangements

6.1 Monitoring of all colleagues compliance

- **How and who by:** Reportable by Reviewer onto ESR by reviewer
- **Reported to:** directly to care groups
- **Frequency:** annually

6.2 Area for Monitoring 2

- **How and who by:** Central monitoring of compliance captured via Care Group dashboard by people and organisational development directorate
- **Reported to:** People and organisational development committee
- **Frequency:** annually

7. Related documents and associated references

- Care certificate | Health Education England (hee.nhs.uk) Retrieved from https://www.hee.nhs.uk/our-work/care-certificate
- Corporate and Local Service Induction Policy – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/publications/corporate-and-local-service-induction-policy/
- Data Protection Impact Assessment (DPIA) Policy Retrieved from https://www.rdash.nhs.uk/publications/data-protection-impact-assessment-dpia-policy/
- Grievance and Dispute Policy – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/policies/grievance-and-dispute-policy/
- Inducting staff - the Care Certificate (skillsforcare.org.uk) Retrieved from https://www.skillsforcare.org.uk/Learning-development/inducting-staff/inducting-staff.aspx
- Mandatory and Statutory Training Policy – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/publications/mandatory-and-statutory-training-policy

- Multi Professional Preceptorship and Educator Policy – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/policies/multi-professional-preceptorship-and-educator-policy/
- Pay Progression Procedure – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/publications/pay-progression-procedure/
- Performance (Capability) Management Policy and Procedure – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/publications/performance-capability-management-policy-and-procedure
- Reducing Restrictive Interventions (RRI) – Formerly PMVA Policy) – RDaSH NHS Foundation Trust Retrieved from https://www.rdash.nhs.uk/policies/reducing-restrictive-interventions-rri-policy/
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- Health Education England (2021) *Care certificate*. Available at: https://www.hee.nhs.uk/our-work/care-certificate (Accessed: 6 March 2023).
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- NHS England (2020) *Online version of the People Plan for 2020/2021*. Available at: https://www.england.nhs.uk/ournhspeople/online-version/ (Accessed: 6 March 2023).
- Skills for care (2021) *Inducting staff – the Care Certificate.* Available at: https://www.skillsforcare.org.uk/Learning-development/inducting-staff/inducting-staff.aspx (Accessed: 6 March 2023).
- Zenefits (2021) *Performance Management.* Available at: https://www.zenefits.com/hr/performance-management/ (Accessed: 6 March 2023).

8. Appendices

8.1 Appendix A Definitions and Explanation of Terms Used

Personal Development Review (PDR) is a planned discussion between a colleague and reviewer. It looks at progress, performance, learning needs, wellbeing and future development, and agrees objectives for the year ahead.

Personal Development Plan (PDP) is an individual plan that records development goals, actions, support and timescales. It helps the colleague and reviewer identify learning needs and track progress.

Reviewee and reviewer: The reviewee is the colleague whose work and development are being reviewed. This policy also calls them the employee or post

holder. The reviewer is the person who leads the review and agrees the record with the reviewee.

8.2 Appendix B Personal Development Review Form

Please refer to Personal development review form (colleagues access only) (opens in new window)

8.3 Appendix C Personal Development Review Short Form

Please refer to Personal development review short form (colleagues access only) (opens in new window)

8.4 Appendix D Values and Behaviour Framework



Passionate

- We work hard to deliver a quality service.
- We are determined to do what's right for people.
- We are positive in all that we do.
- We endeavour to be our best through personal development.
- We do our best to make a positive difference to people.

Reliable

- We follow through on what we say we will do.
- We take responsibility for things we can do something about.
- We take ownership to know and follow best practice.
- We are accessible whenever possible.
- We turn up on time and complete tasks in the time agreed.

Caring and Safe

- We promote equality, diversity, and inclusion.
- We take a person-centred approach.
- We take time to listen with empathy and compassion.
- We introduce ourselves.
- We make sure we keep people safe and speak up when something is wrong.

Open

- We include people in the decisions that affect them and keep them informed.
- We give and receive purposeful feedback.
- We acknowledge our own biases and learn from others' perspectives.
- We celebrate our successes and learn together from our mistakes.
- We are honest and accountable taking responsibility for our actions.

Supportive

- We encourage good physical and mental health including promoting a healthy work life balance.
- We appreciate and respect other people's input and ideas.
- We value our patients, their families, their carers, and each other.
- We work together as #onerdash team.
- We help each other to do the best we can.

Progressive

- We work together for continuous improvement.
- We seek out and share information, knowledge, and experiences.
- We are adaptable and flexible – open to innovation and change.
- We strive for excellence through identifying and testing new ways of working.
- We take responsibility to share and learn from and about each other.

8.5 Appendix E Career Conversation Feedback Summary Form

Please refer to career conversation feedback summary form (colleagues access only) (opens in new window)