

# Personal Development Review (PDR) Policy

## 1. Purpose

The People and Culture Strategy, People First, is committed to “Empowering Excellence....Building Commitment”. A new Personal Development Review (PDR) process has been developed in response to feedback from staff. This simpler and more streamlined process will make it easier for staff to take ownership of their development and achieve their potential.

PDR provides the framework for an ongoing conversation between Reviewer and Reviewee to: review progress against previous Priorities; discuss future plans and career aspirations; co-create future Priorities and Development Goals; and, provide support, as appropriate.

The key to a successful PDR is the meaningful ongoing conversations that occur between Reviewer and Reviewee and the quality outcomes that follow from these conversations, for example, enhanced capability.

Through the PDR process employees will take ownership for their own career and development, with support from their Reviewer and in line with the University's Priorities. For Academics, this Policy should be read in conjunction with the Academic Progression Policy.

## 2. Eligibility

This policy applies to all permanent staff, fixed-term contract staff and those on probation. Clinical Academics must complete PDR in line with Queen's and their Professional Body requirements.

## 3. Principles

- 3.1. To provide an opportunity for the Reviewer and Reviewee to build strong relationships based on trust through meaningful ongoing conversations.
- 3.2. To agree Priorities and Development Goals, the support required to achieve these, and encourage appropriate behaviours in line with our Core Values, ICARE.
- 3.3. To identify the development support required to increase capability, in line with the University's Priorities, and to improve individual contribution through constructive feedback.
- 3.4. To encourage and support Reviewees to take ownership of their own personal development and career aspirations.
- 3.5. To ensure that Reviewers and Reviewees are aware of the range of opportunities for learning and development including: experiences at work (new responsibilities, involvement in a working/project group, job shadowing and secondments); formal

learning (face to face or online, structured courses or qualifications); and social learning by interacting with others (mentoring, networking etc.).

- 3.6. To celebrate an employee successfully achieving Priorities, Development Goals and realising their potential.
- 3.7. To acknowledge the contribution that staff make through service on University networks and advisory groups.
- 3.8. To integrate the PDR and connected Academic Progression processes: Confirmation in Post (CIP); Academic Promotion; Professorial Salary Review (PSR), to become one annual integrated process for Academics at all levels, including Professors and Probationers. This will be underpinned by academic career pathways and revised Academic Profiles.

#### **4. PDR Cycle**

- 4.1. The PDR process is an annual cycle aligned to the academic year. The expectation is that there is an ongoing conversation between Reviewer and Reviewee which includes an Annual PDR Meeting. This meeting, which will normally take place between June and September, will review progress against previous Priorities and Development Goals, discuss and agree future Priorities and Development Goals, and plan effective support and development.
- 4.2. For the Annual PDR Meeting, the Reviewer should agree a date with the Reviewee, giving adequate notice to allow the Reviewee time to prepare sufficiently.
- 4.3. The Reviewer, along with the Reviewee, will agree the frequency of meetings outside the Annual PDR Meeting. Best practice indicates that quarterly meetings are most beneficial.

#### **5. PDR Process**

- 5.1. The process provides the framework for ongoing conversations, formal and informal, in which both Reviewer and Reviewee co-create Priorities and Development Goals, identify skills gaps and put a plan in place to close.
- 5.2. For each stage of the PDR process, the Reviewer should agree the meeting date with the Reviewee, giving adequate notice to allow the Reviewee time to prepare sufficiently.
- 5.3. There are two PDR forms, one for Academics and one for Research and Professional Services Staff. These forms can be used for each stage of the PDR process.
- 5.4. PDR should not be used as a means to manage poor performance and any substantive issues should not be raised for the first time through a PDR meeting. However, where appropriate development interventions have not satisfactorily solved performance issues, then it may be necessary to move into formal procedures. The University's [Capability & Disciplinary procedures](#) will be used to help manage poor performance.

- 5.5. The objective of all PDR conversations is to achieve agreement between the Reviewer and Reviewee this principle should be emphasised throughout. However, if agreement cannot be reached on what should be recorded, the Reviewee should submit an appeal to the Reviewer's line manager (or next senior person) provided there is a procedural or substantive reason for doing so. The outcome of the appeal is final.

## **6. Roles and Responsibilities**

### **6.1. Reviewee**

Reviewees are responsible for actively engaging in PDR, preparing for PDR meetings, agreeing Priorities and Development Goals, skills gaps and developmental actions to close. Reviewees will take ownership of their own development and career path.

### **6.2. Reviewers**

The primary role of the Reviewer is to ensure that PDR provides the opportunity for regular, meaningful, personal development conversations focusing on contribution and quality outputs. In turn, this will enable Reviewees to reach their full potential and maximise their contribution.

### **6.3. Head of School/Director**

Heads of Schools/Directors are responsible for identifying Reviewers, meeting with them to communicate local/institutional Priorities and to ensure clarity around their PDR roles and responsibilities

### **6.4. Faculty Pro-Vice-Chancellor, Registrar and Chief Operating Officer, Head of School and Director**

Faculty Pro-Vice-Chancellors/Registrar and Chief Operating Officer will ensure that institutional Priorities are cascaded across the University.

## **7. Equality and Diversity Policy**

The University values and promotes equality and diversity and will seek to ensure that it treats all individuals fairly and with dignity and respect. It is opposed to all forms of unlawful and unfair discrimination. Queen's University seeks to provide equality to all, irrespective of gender, including gender re-assignment; marital or civil partnership status; having or not having dependants; religious belief or political opinion; race (including colour, nationality, ethnic or national origins, including Irish Travellers); disability; sexual orientation and age. Please click [here](#) to view a copy of the Equality and Diversity Policy.

## **8. Section 75 Statement**

This policy has been screened out with mitigation as per Equality Commission's guidance on screening with no adverse impact with regard to equality of opportunity and/or good relations for people within the equality and good relations categories.

## **9. Personal Data**

Unless required for legal purposes all information, except development needs, recorded on the PDR form is private and confidential.