

# PDR for Research Staff – reviewer guidance

*This guidance is aimed at line managers whose staff are using the 'PDR Form for Postdocs and Research Staff' for their PDR. It is designed as a companion document to this specific form, and complements the PDR guidance for all staff by providing additional insight relevant to having career and development conversations with postdoctoral researchers. It provides insight on how to approach the PDR meeting, what to discuss and how to complete the associated form.*

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## Introduction

- **The PDR**

- ✓ Is meant to enable staff to reflect on and discuss their development and career plan with their line manager, to allow them to deliver their role and achieve their career goals.
- ✓ Is meant to be useful for the reviewee's career, and provide them with positive and constructive feedback.
- ✗ Is not a research planning meeting. Research delivery should be discussed at separate meetings. The main role-specific objectives for the year are here discussed from the lens of the development they will bring or require.
- ✗ Is not an appraisal or performance review. While progress and achievements will likely be celebrated as part of the discussion, constructive feedback provided, and development needs discussed, line managers should organise a separate meeting if they need to discuss important performance issues.

- **Expectations of line managers**

All line managers at Queen's are expected to support the development of the individuals they manage, including by conducting a yearly Personal Development Review, which involves a career conversation.

The University is a signatory of the Researcher Development Concordat, which sets the obligations of institutions, line managers of researchers, and research staff, in supporting the development of researchers. Line managers can learn more about their obligations on the [Researcher Development Concordat website](#).

- **The importance of career development for research staff**

Career development is important for all individuals, but especially for research staff. Indeed, most research staff positions are designed as early career positions with some emphasis on learning and development, are funded via fixed-term contracts, and do not naturally lead to employment in a specific career pathway within the university. The PDR process is designed to support career planning for careers both within and beyond academia by providing space for reflection, discussion, and goal-setting. Career options for research staff are broad and include a wide range of positions in all sectors of activity. Research staff thus need to properly explore their options for further employment, and plan the development of their skills and experience to enable them to become strong candidates for their career of choice. Whatever career they choose, they will eventually have to apply for a position via a competitive process in order to secure more sustainable employment.

For this reason, the University has introduced an allocation of 10 career development days for all research staff, to be spent on activities related to their career development but not directly linked to their research project or contracted role. They should make the best of this allocation and the PDR is the opportunity to plan for this.

The development days allocation of an individual is calculated as a pro-rata of 10 days (~80-100 hours) per academic year depending on their contractual working hours (Full-time vs Part-time) and to reflect their contract start/end date if they haven't been/won't be a Queen's research staff member for the full academic year. It can be difficult to accurately calculate time spent on some development activities and this allocation should be viewed with

flexibility and with the optics of promoting a reasonable amount of development each year; it is expected that approximations will be used when estimating time spent.

- **Which development is role-related or not?**

Role-related development refers to development activities (tasks, training, events attendance etc.) that are required to complete the research project and associated objectives, as well as tasks that, while not absolutely necessary, fit within the job description and profile of research staff. This can include attending conferences, attending training and certification for a home office licence or other integrity requirement, developing analytical skills via online learning, visiting other researchers to be trained in specific methodologies, training and contribution to public engagement, collegiality activities (chairing/ organising symposium, organising journal club, managing equipment, participating in an innovation training programme aligned with the research...).

Other development activities may be more about the researcher's career than the research/role they are employed to deliver, and would be considered as additional development that would normally take place as part of their 10 career development days allocation or in their own time. While these activities would not be considered as the researcher's immediately-contracted work, they may sometimes be carried out 'at work'. These could for example include teaching, exploring career options, attending career development events, seminars or mentoring, visiting a potential employer, preparing job applications, attending interviews, developing personal research interests, developing a fellowship proposal, attending training for skills not required for their research, joining the Postdoc Society etc. Some tasks, such as developing a fellowship proposal, are likely to require more than 10 days.

- **Where does funding for development come from?**

It is first worth noting that many development opportunities don't cost anything, except a bit of time. This includes researching career options, preparing applications, engaging with university training or online resources, free online events and videos, learning from a colleague, joining a committee or event organising group etc.

Development opportunities that are directly related to the researcher's role should normally be covered by the grant that funds their work or by their line manager/team (e.g. G code etc.). Your School or Faculty may have additional funding they can provide. Centrally, the [Agility Fund](#) can support funding application development, interdisciplinary initiatives and impact and research engagement activities. Professional societies in your discipline may also offer training or funding to members.

For development activities that are not directly related to the role of the reviewee and for which none of the above sources are relevant, they will be expected to fund them themselves and the University will solely provide them with the time they need (within their 10 development days allocation).

- **How to support researchers interested in careers beyond academia**

Be reassured, you are not expected to be able to provide detailed information on a career path you have not followed! The [PDR for research staff - reviewee guidance](#) encourages research staff to make use of career exploration opportunities provided by the PDC (career exploration interviews, panel discussions, events, [‘The theory of the postdoc evolution’ PDC podcast](#) etc.), signposts them to a range of online resources where they can find examples

of career options and career profiles, leverage their network and find details on specific roles through job descriptions and informational interviews.

You can:

- Show interest; acknowledge your lack of awareness in that space but be encouraging and state that you are keen to help and are supportive of their choice, even if it is different than the one you made for your career.
- Test their understanding of an option they are considering (How did you find out about this? What do you know about it? Do you know someone doing this? What do people with this role actually do? What skills should ideal candidates have? Where are these roles advertised? Which employers would have such roles in the area you want to live in?).
- Help them reflect on their fit (What is attracting you in this role? I think you are very good at X, that would suit very well with that; I didn't realise you enjoyed X; isn't that a key part of such a role? What do you think are your key strengths/areas you'd need to improve in relation to this job?).
- Help them refine their plans by suggesting activities they may not have thought of to fill gaps in their skills/experience, adapt their role – when possible – to enable them to gain relevant experience.

- **As a manager, how can you contribute to your staff's career development?**

- Provide feedback, insight and suggestions based on your experience
- Act as a sounding-board and prompt further reflection
- Introduce them to contacts from your network
- Provide references for roles they apply for
- Provide feedback on job applications, help with interview preparation
- Provide opportunities to gain new experience, for example to teach, supervise, review papers, organise events, chair sessions, communicate research to the public, engage with industry/other sectors (via IAAs, consultation, KTPs, innovation programmes...), join a committee etc. as relevant to their career plan
- Support them developing independent research ideas (enabling them to carry out preliminary work, support fellowship/grant applications, support them developing a student project...)
- As appropriate, support them attending events (conferences, trade shows, networking...) and courses/workshops, including financially when role-related and possible
- Ensure their workload is appropriately allocated so that it doesn't prevent them from engaging with development or compromise their work-life balance, helping them re-prioritise as required (see [PDC work-life balance guidance](#) for more tips)

Note: this is not an exhaustive list, be creative and don't hesitate to ask them what they'd like you to do for them.

For some career development topics (e.g. careers you are not very familiar with or areas in which you may be biased due to your direct working relationship with them), they may benefit from also talking with another mentor (internal or not, formal or not).

- **Practical expectations**

- Arrange the meeting, usually in the summer (we suggest you set aside ~1.5 h for a meaningful discussion; in one or more settings as you both prefer), and provide a deadline for the reviewee to submit the form to you (usually 1 week before the meeting).

Preparing for the meeting properly will require self-reflection and will be time consuming for them, so leave them several weeks to do so.

- Read the form they submitted before the meeting. Reflect on their plan and issues, and take some notes of the main feedback, suggestions or questions you have.
- During the meeting, provide useful and constructive feedback, as well as suggestions to reach their career development goals.
- Adopt a supportive and positive attitude, creating a safe environment for them to share personal goals and keep the process useful and enjoyable.
- If time is running out and you have not covered all the topics, do not rush the end but set another meeting to finalise the discussion.
- The reviewee will adapt some of the text to reflect the discussion during and/or shortly after the meeting, then send it to you.
- Update notes and fill the reviewer parts of the form and circulate the final version to the reviewee (ideally within 2 weeks after the meeting); keep a record.
- Follow up ~6 months later for a shorter informal progress meeting, to ensure actions are being followed up on and that any arising issues can be addressed.

- **Signposting and additional resources**

- [PDR at Queen's \(People & Culture intranet\)](#): includes details on the process and general guidance and resources for all staff
- [PDR guidance for reviewee](#): includes examples of what research staff could include in each section of the form
- [Leadership and management development at Queen's \(People & Culture website\)](#)
- [Development days policy for research staff \(PDC website\)](#)
- [Concordat manager obligations \(Researcher Development Concordat website\)](#)
- [Work-life balance guidance for research staff and their managers \(PDC website\)](#)
- [Developing individuals \(Vitae\)](#)
- [The academic's success guide – leading your research group \(Imperial College London website\)](#)

Any performance and capability issues should be discussed in a separate meeting when they arise and are not part of the PDR process. For more information on dealing with such issues, visit the [Performance Management Toolkit](#) and/or seek advice from your HR Business Partner.

## **Conducting an effective PDR and filling the form**

The form has been designed to promote self-reflection for the member of research staff (reviewee) and drive a useful career conversation during the meeting. As a line manager, you have very little to write on it, and most of your writing will be done after the meeting to reflect the conversation.

The content on the form is meant to help the reviewee prepare for the meeting, as well as recollect what was discussed and review plans and actions after the meeting. It doesn't need to capture everything that took place in the year, nor everything discussed at the meeting in detail, only the main points and actions. It is not an exercise of style and concise statements and bullet-points are encouraged.

- **Section 1 - Context**

**Aim of the section:**

Provide context to the review, notably on the length of the review period and future review period, in order to reflect and plan in a way that is reasonable to the timeline, both in terms of quantity and quality (e.g. focus on exploring, planning, applying?).

**What to discuss:**

The overall use of their 10 development days allocation (details will be discussed in section 3) and potential challenges related to workload and prioritisation.

**What to write on the form:**

During or after the meeting: Date of informal development progress meeting (~6 months or so post-PDR), and save it in your diary.

**Dos and don'ts:**

Do	Don't
✓ Encourage them to make the best of the 10 days opportunity	✗ Dismiss career development and suggest it isn't important
✓ Hold a date in your calendar for an informal development progress meeting (not mandatory but strongly encouraged; usually ~6 months later)	✗ Be 'picky' around the estimation of the 10 days; be reasonable and approach it with flexibility

**Examples of questions managers could ask:**

- *Has anything significantly prevented you from engaging in personal development or delivering your work this year? Do you expect anything to impact next year's activities?*
- *You've had to take a significant break from work last year; how do you feel about it now? Do you need some adjustments or extra support?*
- *You seem to have used very few development days this year, why?*
- *How could we avoid this from happening again and ensure you spend time on your career planning?*
- *You seem to have spent a lot of your personal time on development activities this year, how has that impacted your life and wellbeing?*
- *How long do you expect to keep this pace?*
- *Do you need help prioritising?*
- *When would you be available for a 6 months catch-up?*

- **Section 2 - career goals**

**Aim of the section:**

Enable the reviewee to share where they would like their career to go and their progress so far, and give an opportunity to the reviewer to help them refine their plans and development focus for the year ahead.

If the reviewee doesn't have a career goal (or only one), one of their goals could be to identify potential careers of interest.

**What to discuss:**

- Their main goal/ plan and 'back-up plans' or other interests
- Their time-frame to apply for positions of interest and how reasonable it is
- Their understanding of the job market for their positions of interest
- Recent progress towards their goal (during the review period)
- Any gaps they want to focus on for the next review period

**What to write on the form:**

Nothing; only the reviewee completes this section.

**Dos and don'ts:**

Do	Don't
<ul style="list-style-type: none"><li>✓ Encourage them to be open-minded with their career options</li><li>✓ Use open-ended questions to get them to think about areas they may not have given enough thought to</li><li>✓ Highlight areas in which you feel their skills and experience fit their goal well</li><li>✓ Show that you are interested in their future and enthusiastic about their plans, whatever they are</li><li>✓ Acknowledge your lack of expertise in the role they have chosen (as relevant); it's ok not to know; you can still help!</li></ul>	<ul style="list-style-type: none"><li>✗ Put pressure on yourself to provide career advice; you are not a career counsellor! Your role is to help them talk through and refine their plan</li><li>✗ Tell them what type of career they should pursue; this is a personal decision/ search they have to do themselves</li><li>✗ Provide any personal judgement (other than positive) on their career goals or make comments that suggest you think some options are more 'prestigious' or 'successful' than others</li></ul>

**Examples of questions managers could ask:**

- *Have you looked at job descriptions for the positions you are interested in? What experience do you have that fits the profile and where are the gaps?*
- *Do you feel you are getting closer to your goal? Do you plan for an intermediate step?*
- *What else are you considering if this first choice doesn't work out?*
- *When do you want to start applying for roles like this? Do you think you are ready for it? What do you need to be ready by then? Why wait that long?*
- *Have you talked to someone with a similar role?*
- *I am not familiar with that role, what does it entail? What especially attracts you in it?*



- **Section 3 - Objectives and development related to the current review period**

**Aim of the section / overview:**

Enable the reviewee and reviewer to discuss the skills and experience developed over the period, notably assessing the impact of development activities planned the year before on the delivery of objectives and the reviewee's progress towards their development goals. This includes both development that resulted from delivering role-specific objectives, and career development activities not directly linked to their contracted role (see the above section 'Which development is role-related or not?' for more details).

Which development is role-related or not?' for more details).

**What to discuss:**

- The impact of their contributions on the project, team, School, strategy (big picture)
- How development activities helped them deliver their role and objectives
- What they have done (in or outside their role) that brings them closer to their career goals
- Reasons why some development activities didn't get completed and how to avoid development being overlooked in the future (if relevant)
- Time spent on development (for role or as part of 10 days allocation) and related pressures in relation to workload, work-life balance, and lessons learned when it comes to estimating time requirements
- Actions that may need follow up or repetition in the next period (they would need to be included in section 4)

**What to write on the form:**

Most is completed by the reviewee. If as a reviewer you had agreed to deliver actions but didn't, you will need to provide some reasons in the relevant table.

**Dos and don'ts:**

Do	Don't
<ul style="list-style-type: none"><li>✔ Show interest in what they have done</li><li>✔ Congratulate them on their progress</li><li>✔ Provide 'big picture' context to their contributions, making them feel valued</li><li>✔ Provide constructive feedback and development suggestions for areas that could be improved</li></ul>	<ul style="list-style-type: none"><li>✘ Focus more on role- and research-related objectives</li><li>✘ Discuss significant performance issues; as mentioned before, a separate meeting should be organised when necessary (it's ok to advise on areas that could be improved in a constructive manner)</li></ul>

**Examples of questions managers could ask:**

- *Which of your objectives are you especially proud of?*
- *Did you struggle with any of your objectives? What could we do about it?*
- *You did ACTIVITY; how did it go? What benefit did you get from it? Was it helpful? Is there anything you would recommend to others?*
- *Do you feel last year's estimation of time for these activities was accurate? Anything you should approach differently when planning this year?*



- **Section 4 - Objectives and development for the next review period**

**Aim of the section:**

Enable the reviewee and reviewer to set role-related objectives and other career-related goals for the year ahead, and plan development to fulfil them, including planning the use of the 10 days allocation. It enables looking at their role as a means to develop (learn new method, expand network, attend events, take on new tasks etc.). Development is not necessarily about attending workshops, and doesn't always require funding. Most of it is obtained 'by doing' and only requires you to provide the reviewee with an opportunity.

**What to discuss:**

- Role-related objectives for the year and what skills, experience or outputs they will gain from them; planning conference attendance yearly is a good idea
- Development needs arising from role-specific objectives (e.g. learn new methodology) and how they will practically be fulfilled (course, visit, shadowing...), including financially (role-related training is normally paid by the grant/ manager)
- How the additional goals they have decided to focus on fit with their career plan
- How you as a manager can help them achieve their goals
- How achievable and reasonable objectives and additional goals are when considering other tasks part of their workload, fit within the 10 days allocation etc.

**What to write on the form:**

During/after the meeting, the reviewee will update to reflect the conversation; you can further clarify the role-related objectives and development if required. Ensure you note the actions you agreed to deliver (e.g. 'peer-review a paper together', 'introduce to a specific contact').

**Dos and don'ts:**

Do	Don't
<ul style="list-style-type: none"><li>✓ Enable flexibility in their role to allow some development aligning with their goals and benefiting you too (e.g. innovation programme, co-writing a grant, conference organisation...)</li><li>✓ Share personal insight, ideas, and offer to help</li><li>✓ Fund role-related development through your grant, G-code, School or specific initiatives (e.g. IAAs, innovation fund, conference fund)</li></ul>	<ul style="list-style-type: none"><li>✗ Discuss project objectives in detail; this is not a research meeting</li><li>✗ Set role-related objectives clearly beyond their job description and grade (they may be as additional development if aligned to their career plan)</li><li>✗ Set unachievable targets within a normal workload (and accounting for development activities)</li></ul>

**Examples of questions managers could ask:**

- *Which of the objectives we have listed are you not confident you can deliver? What would you need to learn to be able to do it? What would be the best way for you to learn this?*
- *How is this activity going to help you fill the gaps you've identified and reach your career goals? Why do you think it is the most important to focus on this year?*
- *How did you estimate the time that this would take? Is it a worthy time investment?*
- *What could I do to help you achieve these goals?*

- **Section 5: End of review period summary**

**Aim of the section / overview:**

Summarise the reviewee's contributions and overall experience at work in the past year, celebrating successes and progress, and potentially troubleshooting some challenges or insecurities. It also aims at clarifying the reviewee's employment situation and the options and next steps they will likely take to secure employment beyond their current contract.

**What to discuss:**

- Successes and progress: their personal view and yours
- Challenges (e.g. workload, work-life balance, issues with people or local culture...)
- Expected end of contract and opportunities for further employment (upcoming funding that could provide a contract extension, possibility of a fellowship or project grant they could be named on, opportunities in another team, application for positions at Queen's or beyond etc.)

**What to write on the form:**

This is the main part the reviewer needs to fill. You should summarise suggestions to help with any challenges discussed, but mainly focus on celebrating what they did well in their role and development (specific achievements, progress etc.), what you admire or value in their attitude to work (e.g. commitment to quality/integrity in their research, helpful/collegiate/collaborative attitude, efforts to share resources etc.).

In the 'next steps' box, summarise the main options discussed and most likely route for further employment. If relevant, you can indicate actions required from the reviewee or yourself for any option to happen (e.g. the reviewee will develop a fellowship proposal with your support, they will apply for positions and you will provide a letter of recommendation...).

**Dos and don'ts:**

Do	Don't
<ul style="list-style-type: none"><li>✔ Talk positively about them, sharing personal reflections</li><li>✔ Celebrate contributions beyond research (engagement, collegiality...)</li><li>✔ Be clear and realistic about their future employment options with you</li><li>✔ Organise a separate meeting for challenges requiring more time</li></ul>	<ul style="list-style-type: none"><li>✖ Avoid the conversation about future employment or embellish what options might be available because the truth is difficult for you to say</li><li>✖ Be biased by your own interest (retaining them in your group may benefit you but may not be the best for them considering their career plan and potential precarity: acknowledge that with them)</li></ul>

**Examples of questions managers could ask:**

- *What are you proud of in your attitude at work? What brought you satisfaction this year? What negatively impacts your wellbeing at work? What could we do about it?*
- *If possible, would you like to keep working in the group for another contract? Would you like to be involved in securing funding for it, writing a fellowship or as grant co-applicant?*
- *What works well in the way I manage you? Anything I should do differently to suit your personal preferences?*

## **Six-months post-PDR progress meeting**

We advise that you schedule a short and more informal meeting approximately 6 months after the PDR to discuss progress.

Aims:

- Remind both reviewee and reviewer of the actions they agreed to take, potentially triggering steps to be taken
- Discuss any outcome or progress so far
- Re-focus priorities if needed (goals may change)
- Address arising issues

There is no paperwork to be done, but we would advise the reviewee to write the relevant updates on their next PDR form for the ongoing period (to take place ~6 month after), in order to save time later. There is no need to submit the form to the reviewer, it can just be brought to the meeting as support for the discussion.