

Worcestershire Acute Hospitals NHS Trust Personal Development Review (PDR) Policy

Department/Service	Human Resources
Accountable Director	Chief People Officer
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Introduction

The Trust recognises that our collective success and achievement is reliant upon the effectiveness of all our colleagues in making their contribution to our Trust strategic objectives. The PDR process will contribute to providing an assurance mechanism so that colleagues are equipped with the right skills, knowledge, competence, and behaviours. This will help support them in demonstrating care and compassion in accordance with our Trusts values and behaviours and to work flexibly in support of patients and supported to grow, develop, and realise their potential.

What this policy covers

This policy covers the process and procedures for ensuring that colleagues within the Trust receive an annual personal development review and interim review where appropriate.

The policy sets out clear duties for.

- Responsibilities.
- Planning, undertaking discussion, recording & monitoring of all aspects of the PDR.

This policy applies to all colleagues (except Medical and Dental colleagues who are covered in policy WAHT- HR-094) on substantive or fixed-term contracts and outlines the specific terms and conditions surrounding the personal development review process.

What is the purpose of PDR?

A personal development review provides an opportunity for reviewers and reviewees to:

- Discuss health & wellbeing and that colleagues are made aware of any support services available and are able to access those services where needed.
- Discuss and evaluate the previous year's successes.
- Clarify the job requirements, expectations, and standards ensuring the job description accurately reflects the role duties and responsibilities.
- Strengthen positive behaviour and discuss any challenges/ frustrations.
- Agree on personal SMART (see definitions) objectives for the coming year in line with individual needs and needs of the team/department/service and organisational objectives.
- Identify any future personal or professional training and development needs.

While the PDR cycle is an ongoing process, having a scheduled annual PDR ensures protected time of at least an hour for the discussion and should provide the opportunity for both the reviewer and reviewee to prepare in advance of the conversation.

Definitions

PDR- Personal Development Review

Reviewer - The colleague carrying out the PDR.

Reviewee – Colleague who is having their annual PDR.

SMART - Specific, Measurable, Achievable, Realistic, Time-bound.

PDR - Personal Development Plan

WAHT - Worcestershire Acute Hospitals NHS Trust

Responsibilities

The Trust Board will ensure that PDR's support the strategic objectives of the Trust.

The Director of People & Culture will:

- Ensure provision of appropriate support for reviewers / Line Managers relating to capability/conduct and the performance management process.
- Monitor deferral of pay progression in partnership with Line Manager and colleagues.
- Ensure the workforce information team provides monthly compliance reports on PDR activity to Divisions.

The Divisional Directors are responsible for:

- Ensuring the effective implementation of the PDR process within their division in line with the framework outlined in this policy.
- Ensuring all PDR activity is recorded on ESR to enable comprehensive corporate monitoring of PDR activity.
- Ensuring a culture of fairness, openness and inclusivity exists in applying this policy.

Managers (this may be the Reviewer) are responsible for ensuring that:

- All colleagues within their team receive a PDR at the specified time and it has been recorded appropriately and timely.
- An accurate job description for the post is in place.
- Performance and conduct issues are dealt with separately from the PDR. There should be no surprises. Please review the Trust's [Performance Management Policy WAHT-HR-009](#)
- Ensuring a culture of fairness, openness and inclusivity exists in applying this policy.
- They identify suitable Reviewers at the appropriate level to carry out the review.
- Reviewers have a reasonable number (ideally no more than 12) of PDRs to undertake in 12 months.
- Reviewers attend the appropriate training to carry out the PDR and refresher training where appropriate.
- PDR records are kept secure on personal files, locked away with limited access.
- Reviewers and Reviewees have the time, resources, and support to undertake all the responsibilities set out in this policy.
- They forward training & development plans for their department to the Learning & Development department.

Reviewers are responsible for:

- Ensuring they meet the person specification for PDR Reviewer.
[PDR Training for reviewers](#)
- Scheduling in and holding a PDR with their designated colleagues either face to face or virtual, ensuring it's a private space with no/ minimal risk of interruptions.
- Ensuring the PDR is a fair and honest discussion of the reviewee's performance and that the reviewee's views are heard and appropriately considered.

- Ensuring that all concerns are raised during the year and not left until the PDR, there should be no surprises.
- Ensuring that they are prepared thoroughly for the meeting using the PDR support pack. See support pack document.
- Ensuring the Reviewee is allocated protected time to prepare thoroughly.
- Completion of relevant documentation and a copy given to the reviewee.
- Checking completion of mandatory training and any role specific competencies.

Reviewees are responsible for:

- Ensuring they have prepared thoroughly for the PDR, using the PDR support pack.
- Attending any relevant training.
- Actively participating in the PDR process and discussion.
- Maintaining evidence of learning and development they have undertaken during the year.
- Ensuring they have appropriate evidence of completion of mandatory training/competencies.
- Collecting evidence of achievements throughout the year.
- Making themselves available for the meeting at a suitable scheduled time.

Learning and Development/OD are responsible for:

- Supporting the implementation of the PDR process to include training and awareness sessions for all colleagues.
- Providing a support pack for reviewers and reviewees in the use of PDR paperwork and process and updated when necessary.
- Ensuring all PDR's recorded onto the online submission form are entered into ESR and ready for monthly compliance reports.
- Ensuring that development/ training information feeds into the annual training plans.

Policy detail

This policy details the framework for managing PDRs and associated pay progression: The conversation should be person centred, with focus on improvement opportunities and achievements, and four mandatory key components of the PDR process- listed below. There is a further component of a career conversation which is optional.

1. A meaningful health & well-being conversation at the heart of the PDR.
2. Review of Personal objectives, achievements and contributions made.
3. Explore examples of how the values have been brought to life through our behaviours.
4. Agree on meaningful, SMART objectives that add value to the job aligned to departmental and trust objectives.
5. Be able to effectively apply improvement system tools and techniques as part of your work.
6. Agree on an individual personal development plan.
7. A career conversation as an optional stage at the end of the PDR or at anytime as a standalone. Providing a high-quality coaching conversation focusing on individual personal ambition for growth within their career.

Refer to support pack for process.

The minimum requirement is to evaluate the reviewee against the Trust's signature behaviours, ensure all mandatory and role-specific requirements are met, agree on objectives and for a personal development plan to be produced. If there are issues with a reviewee's development or if there are any capability or performance issues, these should have been addressed through their line manager and the manager should seek advice from HR as to whether the issues raised should be addressed through the performance management policy.

The required PDR paperwork can be found here - [PDR Paperwork](#)

WAHT aims to ensure that the PDR reflects its Equality and Inclusion values and behaviours. There will be equity of access to appropriate training and development regardless of band, full-time or part-time status, shift pattern, gender, sexual orientation, age, ethnicity, and disability.

It is expected that colleagues will progress through the pay points of their pay scale on an annual basis. However, this will be subject to individuals demonstrating the required standards of performance in line with the procedure for Managing Incremental Pay progression WAHT-HR-090.

Timescales

Line Managers should agree with the reviewee their objectives within 3 months of commencing in their role. With the PDR taking place annually. The personal development plan should be reviewed regularly and adjusted accordingly dependant on the development needs of the colleague.

Pay Progression

It is anticipated that all colleagues will have provided the appropriate level of performance, delivery and development and will progress through the pay points of their pay band. Progression through the pay point will be conditional upon individuals demonstrating the required standards of performance and delivery and that they have the requisite knowledge, skills, and competence for their role. They will need to demonstrate the completion of all statutory and mandatory training for their post. Individual performance will be monitored throughout the year so that any under performance is brought to the attention of the individual and addressed appropriately as soon as possible.

If the pay progression needs to be postponed until the skills and knowledge level has been achieved, a notification needs to be sent to Workforce Information as the pay progressions are currently processed centrally. Where a colleague does not meet the required standard a formal record of discussion between the manager and the colleague must take place. The discussion must identify any deficit in the knowledge and skills that the colleague needs to develop and apply a clear action plan. Once the level for the pay progression has been reached, notify Workforce Information of the date to process the pay progression from.

Refer to the [Procedure for managing incremental pay progression WAHT-HR-090](#)

Personal development plans

Development will primarily focus on helping reviewees to carry out their current job to the standard specified in their job description for the coming 12 months. This should be appropriate development, which is relevant, timely, realistic, and agreed. The development will be beneficial to the Trust, in that this helps us achieve our workforce planning requirements.

As individual training needs are discussed, and development is agreed as part of the PDR the training needs will be recorded. A departmental training plan should provide us with what, where and when the development will be undertaken.

For training/ development process, application and funding refer to Study Leave Policy for Non-medical staff WAHT-HR-082.

Other conditions

If any colleague is due to go on maternity, adoption, shared parental leave or a career break, a PDR can be scheduled before they are due to finish work. If this isn't possible, it will be conducted retrospectively as part of the return-to-work process.

For those colleagues who are on long-term sickness, and whose PDR is overdue this should be scheduled in when they have returned to work. e.g., due to maternity or long-term sick leave, and in such circumstances pay progression will not be deferred as long as the PDR is completed within 8 weeks upon the employee's return to work. Where the reason for non-compliance is due to managerial issues, the employee will not be penalised.

Appeal/ Disagreements

Should a reviewee be dissatisfied with the outcome of their PDR. They have the right to appeal this. Colleagues can do this via two routes, the first approaching the line manager informally for discussion with the aim of reaching a mutual agreement. Alternatively, colleagues may wish to refer to the Trust Grievance Policy.

Implementation Plan

This policy will be available on the Trust Intranet.

A policy briefing will be developed for Divisional Management Boards, Directorate Meetings and Worcestershire weekly.

[HR Policy Supporting Documents](#)