



NUFFIELD DEPARTMENT OF  
CLINICAL NEUROSCIENCES



# **PDR GUIDE**

**FOR REVIEWEES AND REVIEWERS**

***PROFESSIONAL AND  
SUPPORT STAFF***

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## RESPONDING TO YOUR FEEDBACK

Over the past few years, the PDR completion rate has been much lower than when the scheme was first introduced. To improve the PDR process and ensure it is useful for everyone, we consulted with staff through a survey and focus groups. Here is how we responded to your feedback:

1. **You said:** “Academic & Research staff and Professional & Support staff have different needs.”

**We did:** The PDR form now asks reviewees to consider their achievements more broadly, rather than breaking them down into role-specific categories. This means it should be more suitable for helping staff across all roles to prepare for their PDR meeting.

2. **You said:** “The PDR feels like a box-ticking exercise, not like something that could be of value to me.”

**We did:** We overhauled the section of the PDR form on reflection and self-assessment to help you take stock, identify obstacles to your progression and to plan concrete steps to move forward. In addition, the **PDR Guide** includes prompting questions to help you reflect on your recent professional activities and achievements, advice on goal setting, and a list of relevant training courses. The guide provides a framework to consider all of your professional activities and suggests how you can grow your portfolio beyond the well-known indicators of success.

3. **You said:** “It is difficult knowing which courses are relevant for me.”

**We did:** It can be tricky to navigate the different training and development courses and providers available to you. The **PDR Guide** now suggests courses that are relevant across a range of areas.

4. **You said:** “Goal setting can be difficult.”

**We did:** The guidance on goal setting in our **PDR Guide** links to professional development frameworks: Vitae’s Researcher Development Framework and the Association of University Administrators. These frameworks offer a holistic approach to development in research and professional careers respectively, which allows you to assess which areas you might need to work on.

5. **You said:** “There is significant overlap between the NDCN PDR form and the annual NHS appraisal that clinical academics must complete.”

**We did:** Clinical academic staff who complete an annual NHS appraisal to maintain their GMC licence can now submit their NHS appraisal and a supporting form to their reviewer, instead of a full NDCN PDR form. If this option is selected by the reviewee, the NHS appraisal should be used to guide the PDR conversation. A supplementary form for clinicians should also be submitted to the HR Team for data monitoring purposes.

## **PDR PROCESS AT A GLANCE**

The PDR process comprises seven steps:

1. Reviewer arranges PDR meeting with reviewee.
2. Reviewee completes Sections 1-3 of this PDR form.
3. Reviewee sends completed PDR form to their reviewer at least one week before their PDR meeting.
4. Reviewer reads the completed PDR form, adding their own comments to the form where prompted.
5. Reviewee and reviewer meet, using the completed PDR form to guide the PDR conversation. Both the reviewee and reviewer take notes.
6. After the meeting, the form is revised as necessary, based on the PDR conversation. The reviewee sends any additional comments to the reviewer. The Reviewer adds these and their own comments to Section 4.
7. Reviewer emails the completed form to the NDCN HR Team ([hr@ndcn.ox.ac.uk](mailto:hr@ndcn.ox.ac.uk)).

## **ABOUT THE FORM**

The PDR form is designed to help reviewees and reviewers get the most out of their PDR meeting. The questions should act as a discussion prompt for the meeting, asking both parties to consider the full range of factors influencing the reviewee's personal development. Some questions may feel difficult to answer but are included to make sure these areas can be discussed openly between individuals and their line managers.

There are four sections to the PDR form:

### **SECTION 1 - ABOUT YOU**

Basic information to be completed by the reviewee prior to the review meeting.

### **SECTION 2 – TAKING STOCK**

A review the past year, including consideration of:

- Whether their responsibilities have changed;
- Progress or any barriers to meeting objectives set out in their previous PDR;
- Their engagement with a mentor;
- Their workload and work-life balance;
- Their working environment;
- Additional responsibilities and career development opportunities beyond their role.

### **SECTION 3 – PLANNING AHEAD**

Reviewees suggest development objectives and training needs in order to achieve these objectives. These goals will be reviewed by the reviewer and discussed at the PDR meeting. Reviewees should also consider their career aspirations and how the Department might help them in achieving these.

## **SECTION 4 – SUMMARY**

After the PDR meeting, this section should be completed by the reviewee and reviewer to ensure both parties have a shared understanding of the discussions and actions going forward.

## **DATA STORAGE**

All PDR forms will be kept electronically in a restricted access folder and paper copies are kept in individual HR files, which are securely locked away with restricted access by HR personnel only.

# **EXPECTATIONS**

## **REVIEWEE**

The reviewee will:

- Take adequate time to complete the form, providing enough detail in order to facilitate the discussion at the PDR meeting.
- Send the completed PDR form to the reviewer at least one week before the PDR meeting.
- Ensure there are no surprises at the PDR meeting by raising these with the reviewer beforehand, for example at a regular one-to-one meeting.
- Be proactive in considering their development needs and career goals and how they might align with their current role.
- Where appropriate, bring new ideas regarding working practices, how their role might expand, and any projects they could undertake.
- Explore options for training courses and funding opportunities to help meet their development needs prior to the PDR meeting.
- Understand that some of their development needs and career goals might not be able to be met within their current role.
- Keep track of their progress following the PDR meeting and discussing this with their reviewer at any regular one-to-one meetings.

## **REVIEWER**

The reviewer will:

- Allow the reviewee to take a morning or afternoon away from their work to complete the PDR form.
- Schedule a meeting slot that allows for sufficient time to discuss the reviewee's development in detail.
- Ensure there are no surprises at the PDR meeting by raising these with the reviewee beforehand, for example at a regular one-to-one meeting.
- Focus solely on the reviewee's development during the meeting and not discuss matters relating to the reviewee's day-to-day work.
- Have a clear strategy for their team, including how the reviewee's role fits within it and, where appropriate, communicate this strategy to the reviewee.
- At the same time, be open to any new ideas that the reviewee may bring regarding working practices, how their role might expand, and any projects they could undertake.
- Be encouraging, praise the reviewee's achievements, and offer constructive feedback where necessary.
- Ensure that the reviewee is aware of and plans for their guaranteed five days dedicated to development activities.

- **Be clear about the availability of funding for development activities from the team's budget and, where necessary, signpost the reviewee to other sources of funding (such as the NDCN Staff Training Fund).**
- **Provide opportunities to catch up with the reviewee and their progress following the PDR meeting at any regular one-to-one meetings.**
- **Send the completed PDR form back to HR.**

## **REFLECTIVE PROMPTS AND TRAINING COURSES**

This section offers reviewees a series of prompting questions to support their reflection process. Below each section are some suggestions of relevant courses from various training providers:

- [Medical Sciences Division \(MSD\) Skills Training](#)
- [Research Services](#)
- [IT Learning Centre](#)
- [Molly online courses](#) (formally Lynda.com)
- [People and Organisational Development \(POD\)](#)
- [Equality and Diversity Unit \(EDU\)](#)

Note: since some training providers update their offerings on a termly basis (e.g. MSD Skills Training, Careers Service), some of the suggestions may link to training that has already taken place but is included for reference as it is likely to be run again in the future. So, keep a look out on the respective websites for updates. Reviewers may also find these sections helpful for supporting reviewees to do so and identifying relevant training and development opportunities.

These questions cover a diverse range of activities and possible areas for professional development, some of which will be appropriate for some Professional Services staff and not for others.

The questions are intended to broaden your thinking about types of activities and professional development that you are currently engaging with or may want to consider in the year ahead. You do not need to respond to every question; rather use them selectively as 'prompts for reflection' by picking the questions that seem the most relevant to your current situation.

The questions are grouped according to the following categories:

- [Providing Excellent Support within a Team](#)
- [Leadership/Ownership](#)
- [Working Relationships](#)
- [Additional Administrative Duties](#)
- [Professional Development](#)

For each subsection, you may find it helpful to consider what you have found rewarding or challenging and any progress made towards objectives you previously set yourself.

### **PROVIDING EXCELLENT SUPPORT WITHIN A TEAM**

1. Can you recall any instances where you went above and beyond to provide support?
2. Can you recall any instances where the support you provided had a positive impact on your team or the department?
3. Have you created or helped to create any new processes designed to improve the support you or your team provide?
4. Have you supported any major projects within your team, the Department, or the University?
5. Have you helped to resolve an ongoing issue within your team or the Department?

### Relevant courses on providing excellent support within a team

#### POD

Minutes and agendas: papers and preparations for effective meetings: E-book for anyone who is servicing a committee and wants to build their knowledge and practical skills.

#### Research Services

Research administration training: a workshop for Oxford staff with responsibility for research administration or research support.

#### Work Learn Develop (Professional Qualifications)

Business Administration: Level 3 Higher or Level 4 Advanced

AAT Foundation Accounting: Levels 2, 3, or 4

Human Resources CIPD: Level 3 or 5

Customer Service Diploma: Level 3 Advanced

#### Molly

Time Management Fundamentals: Learn how to get more done in the shortest time possible and avoid the obstacles and distractions that can get in the way of good time management.

Managing meetings: Guide to setting up and facilitating meetings, including how to deal with common meeting problems (e.g. latecomers, managing conflicts), creating ground rules and addressing the specifics of virtual meetings.

Presentation skills: Anyone who has to deliver presentations to groups of people as part of their role at work.

## LEADERSHIP/OWNERSHIP

1. Have you managed any projects within your team, the department, or the University?
2. Have you taken on leadership or ownership over an area of work within your team, the Department, or the University?
3. Have you managed any budgets for your own projects, your team, or the Department?
4. Have you completed a major piece of work for which you were the lead?

5. Have you undertaken any independent research or consultations (e.g. surveys, focus groups) designed to acquire knowledge relevant to your role?
6. Have you written or started working on any reports or publications?
7. Have you delivered any presentations or talks within the capacity of your role in NDCN?
8. Have you acquired any funding relating to your role or your professional development (e.g. from NDCN's Parent's & Carer Careers Fund, Public Engagement Fund or Staff Training Fund, or perhaps from the University's Public Engagement with Research Seed Fund, academic societies or associations)?

### Relevant courses on leadership/ownership

#### MSD

[Writing and Publishing Research Papers](#): This course will help you write medical journal papers and get them published in the most effective way.

#### POD

[Project management essentials](#): This workshop is for staff who want to manage an activity as a project, with a start and end date and defined outputs, but who have no previous training in project management.

#### Work Learn Develop (Professional Qualifications)

[Associate Project Manager](#): Level 4 Advanced

#### Molly

[Project Management Foundations](#): Project management is a start-to-finish approach to getting things done and making projects more successful.

[Agile Project Management with Microsoft Project](#): Learn how to use Microsoft Project for Agile projects.

## WORKING RELATIONSHIPS

1. Have your working relationships substantially changed since your last PDR?
2. Have you formed any new working relationships (departmental, Divisional, institutional, external)?
3. Have you developed or played a part in developing any new collaborations?
4. Have you gained any new line management duties?
5. Have you received any form of mentoring from someone who is not your line manager?
6. Have you supported anyone as a mentor in a professional capacity?
7. Have you undertaken any teaching activities or delivered any training sessions within the capacity of your role in NDCN?
8. Have you taken part in any public engagement activities within the capacity of your role in NDCN?

### Relevant courses on Working Relationships

#### POD

[POD Confident Manager programme](#) : A flexible and innovative programme focused on people management skills development.

**Workplace coach programme:** This course will enable you to develop the coaching skills and understanding required to be able to coach colleagues on a range of workplace issues.

**Oxford Senior Women's Mentoring Network (formerly known as Ad Feminam):** The Oxford Senior Women's Mentoring Network (OSWMN) is a mentoring scheme intended to encourage senior women to explore their leadership potential within academic life, or within an administrative career, for example as leaders of departments and divisions or in university governance.

**Managing People: Key Processes:** The online course covers key staff management processes such as how to manage induction, probation and PDR.

**Inclusive leadership:** Online course for anyone who leads, manages or supervises staff in the University.

**Difficult conversations:** E-book for anyone who needs to have a difficult conversation with a colleague or who has had a difficult conversation and wants to know how to do it better.

**Developing management skills at Oxford (DMSO):** For managers who have responsibility for a team or group (two people or more) and who have not attended a management course before. The programme is also suitable for those who want to refresh or develop their management practice.

**Developing leadership and management practice (DLMP):** The programme covers the core capabilities of self-awareness, being accountable, having strategic oversight in planning and decision-making, developing individuals and teams, dealing with conflict and challenge, communicating and influencing effectively and leading change.

**Coaching skills for managers:** For anyone who has responsibility for line managing or supervising staff and is interested in learning a coaching approach to use with their team.

## MSD

**MSD Public Engagement training:** a number of courses including an introduction to public engagement, communicating your research through story, podcasting and two-way engagement.

## Work Learn Develop (Professional Qualifications)

**Management:** Team Leading: Level 2 Intermediate; Supervisor: Level 3 Advanced; Operations/Departmental Manager: Level 5 Standard; Chartered Manager Degree: Level 6 Standard

## EDU

**Pivot:** A University of Oxford mentoring scheme for Black and minority ethnic staff

## Molly

**Manage People and Projects Effectively:** Discover how to meet goals and deadlines while getting the most out of your employees, with these time-tested project management and leadership techniques.

**Professional Networking:** In this course, you will be shown networking strategies that you can personalise and play to your strengths and connect with people.

**Assertiveness: managing relationships in the workplace:** For anyone who wants to explore ways to communicate based on mutual respect as a way to improve working relationships.

**Managing your manager:** The course looks at how you can better understand your manager's world, their needs and expectations and how you can use that awareness to bridge any gaps between you and to build a productive working relationship.

## ADDITIONAL ADMINISTRATIVE DUTIES

1. Have you taken on any new committee duties (departmental, Divisional, institutional, external)?

2. Have you organised any events (departmental, Divisional, institutional, external) within the capacity of your role in NDCN?
3. Have you undertaken any other additional administrative duties that fall outside of your role?
4. Have you contributed to the Department's Athena SWAN or Staff Development activities?

### Relevant courses on Additional Administrative Duties

#### POD

[Minutes and agendas: papers and preparations for effective meetings](#): E-book for anyone who is servicing a committee and wants to build their knowledge and practical skills.

## PROFESSIONAL DEVELOPMENT

1. Have you attended any courses or training related to your role or your broader professional development?
2. Have you attended any conferences, study days or workshops within the capacity of your role in NDCN?
3. Have you learnt to use any new techniques or systems relating to your day-to-day work at NDCN?
4. Have you gained or embarked on any professional qualifications?
5. Have you attended any skills refresher sessions relating to your day-to-day working practices at NDCN?
6. Have you undertaken any external appraisal processes relating to your professional accreditation?

### Relevant courses on Professional Development

#### POD

[Oxford Women's Development Programme](#): This programme aims to help individuals develop self-awareness and an understanding of who they are, as well as the emotional resilience and confidence needed to achieve personal and professional development goals successfully.

[Beacon: personal effectiveness](#): For staff who are at a point in their career or personal lives where they would like to reflect on their achievements, consider opportunities and develop confidence in reaching new goals.

#### Molly

[How to Develop Your Career Plan](#): Learn how to design and implement your career plan, create a personal development plan (PDP), set achievable goals, and connect with a mentor.

[Developing Self-Awareness](#): In this course, learn how to become more self-aware in order to develop yourself personally and enhance career progression.

[Personal Effectiveness Tips](#): This course shares research-based best practices to help you establish your credibility, identify your leadership blind spots, deal with change, find mentors and sponsors to guide you, and more.

## **FOR REVIEWEES: GUIDANCE ON OBJECTIVE SETTING**

One of the outcomes of the PDR meeting should be greater clarity about next year's objectives and the steps required to help you to achieve these. There are several approaches that might help you to identify these objectives:

- look at each of the main points on your job description and identify potential progress/objectives for each of these
- think about your personal or team priorities and challenges to decide if any of these require specific objectives
- think about what you feel is needed most to improve your achievements/progress and use this as the basis for objectives
- think about your key development needs and base objectives on these.

While it's tempting to focus on tasks, objectives can also be about:

- confidence, in terms of the way you do something
- maintaining the way you do something (recognizing that not all jobs have new or changing content and that we need to go on doing some things consistently and well)
- learning something new
- learning to do something better
- the way you behave in relation to others or to a particular task
- achieving milestones in a project.

## **SETTING SMART GOALS**

The SMART framework can help to clearly define your objectives, by ensuring they are:

- **S**pecific
- **M**easurable
- **A**greed (or achievable)
- **R**ealistic (or relevant)
- **T**imebound.

### **SPECIFIC**

- What are you going to do and why is it important? How does it align to the strategic objectives of your team or the department or to your personal career goals?
- How can you accurately describe your goal? Tip: use action verbs to focus the objective e.g. change, create, identify, perform or increase.

- What are the steps in achieving this goal? Who will be involved? Where and when will it happen?

#### **MEASURABLE**

- What does success look like?
- Is the outcome quantifiable? Can it be measured as a numeric value (e.g. number of papers submitted, length of time to complete a process, satisfaction percentage)? Note: not all goals are quantifiable.
- How will you measure progress towards achieving the goal?
- How will you know when it has been achieved? What is being measured?
- What is the current situation (baseline) and what change are you looking for (e.g. change in number or percentage)?
- What is the system of measurement?

#### **ACHIEVABLE**

- Can the objective be done given any constraints you might be working within (e.g. time, access to funds or resources)?
- Is it within your power or influence?
- Is it in principle possible?
- Is it measurable?
- Are the necessary resources currently available or obtainable?
- What are the limitations? Can they be overcome?

#### **RELEVANT**

- How will this goal link to broader team or departmental objectives?
- Is it worthwhile? What impact will it have?
- Is it the right time to pursue this goal?
- Does it align with other projects or objectives within the team or department?
- Are you the right person to pursue this goal?

#### **TIMEBOUND**

- What is the deadline by which the goal should be completed?
- What is the timeframe for the different steps in pursuing this goal?
- How will you prioritise steps within this goal or tasks related to the goal around your everyday duties?
- Are there any competing demands or any potential delays?
- Is it realistic within the time and resources available?

*Adapted from POD's Skills Guide: [Agreeing Objectives](#)*

## **RESOURCES**

The following resources offer additional guidance on goal setting as part of your broader career goals and within the context of Professional Services roles.

### **CAREER WEAVER**

[Career Weaver](#) is a web-based application to help you identify, take ownership of and articulate clearly some underlying beliefs, preferences and strengths which are important for career planning and your success. They are reflected in the choices you make and your experiences to date, but can be difficult areas to explore because you use them without having to think or consciously bring them to the surface

### **OXFORD CAREERS COMPASS**

The [Oxford Careers Compass](#) contains a series of exercises designed to provide you with the foundations to consider your career options, make informed decisions, and reflect on and evidence your professional skills.

### **ASSOCIATION OF UNIVERSITY ADMINISTRATORS (AUA) CONTINUOUS PROFESSIONAL DEVELOPMENT (CPD) FRAMEWORK**

The [AUA CPD Framework](#) is based on nine professional behaviours that are common across P&S roles. The [guide](#) to using the framework offers practical exercises that allow you to assess your strengths and identify areas where you can develop in line with your current role or longer-term career goals.