



GUIDANCE ON COMPLETING A PERSONAL DEVELOPMENT REVIEW (PDR)

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This document provides guidance on completing a Personal Development Review (PDR) in [MyWorkplace](#).

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1. Personal Development Review Process

<p>The line manager (Reviewer) sets a date for the PDR meeting between January-March to review the previous year.</p>	<p>The employee (Reviewee) generates their PDR form via the Review Lifecycle found under the Performance tab in MyWorkplace. The Reviewee completes the Personal Development Review (part 1) section in the PDR form. The Reviewee reviews each of their objectives and rates their status. Objectives can be added at the beginning of this process and new objectives added/amended throughout the year.</p> <p>Once they have completed the Personal Development Review section (part 1) in the PDR form they need to save it and submit, which will inform the Reviewer.</p>
<p>Personal Development Review meeting is held to discuss progress over the past year, achievements, workload, career aspirations, professional and personal development. New objectives for the coming year are also agreed.</p>	
<p>Reviewer completes the Summary Comments from the Reviewer in the PDR form following PDR meeting, based on the review meeting discussions. The Reviewer sets this as complete in the Lifecycle and the Reviewee is informed.</p>	<p>Reviewee agrees the Summary Comments from the Reviewer. If they wish to discuss further they should contact Reviewer. Reviewee completes the Summary Comments from the Reviewee in the PDR form following PR meeting, based on the review meeting discussions. The Reviewee sets this as complete in the Lifecycle and the Reviewer is informed.</p>
<p>Reviewer checks Summary Comments from the Reviewee and the PDR form is now complete. The Reviewer sets form as complete in the Lifecycle.</p>	<p>Reviewee adds new objectives discussed at PDR meeting as part of the next PDR cycle.</p>

2. Introduction

The PDR should be used as the basis of a conversation between a Reviewee and Reviewer about progress over the past year (January – December), achievements, workload, career aspirations, professional and personal development. Reviewers should provide guidance, advice and support and can steer Reviewees towards other support available, including from external resources. **The Reviewer must be the individual who is listed as the Reviewee's line manager in MyWorkplace.** If this needs to be amended, please contact HR (HRHelp@sgul.ac.uk).

The PDR form takes advantage of the functionality offered by [MyWorkplace](#). This enables easy access to the form for Reviewers and Reviewees and enables auto-population of some data, for example learning and development activities.

PDRs should not discriminate against any individual and provide a means of ensuring that everyone receives an appropriate level of support to achieve their potential. It is the responsibility of Reviewers to ensure that each review is carried out fairly and objectively.

Depending on the Reviewee's role they will have been assigned the [Standard PDR Form](#) or the [Academic PDR Form](#). If this needs to be amended, please contact HR (HRHelp@sgul.ac.uk).

Clinical academics holding honorary consultant appointments should complete the L2P form with their NHS Trust and follow the guidance in [section 9](#) of this document.

PhD students are not required to undertake a PDR form as they undertake regular progress reviews as a separate process.

The headings on the PDR form provide areas for discussion between the Reviewee and Reviewer as part of a review meeting. How much detail is written in the form under each area is up to the Reviewee. After the meeting both the Reviewer and Reviewee should complete their summary sections. Please note that the PDR form in [MyWorkplace](#) is found under the page headed "Performance". The heading "Performance" is pre-set by the external providers of [MyWorkplace](#). However, this is where the PDR form and objectives will be located but does not reflect the emphasis of a PDR which, as the name suggests, is aimed at considering personal development and progress, as outlined earlier.

Fields marked with a blue dot on the PDR form or objectives are mandatory fields and must be completed.

It is accepted that the PDR form will develop over time and in light of experience. Feedback is therefore welcomed. Please email any suggestions to staffdev@sgul.ac.uk. The PDR form and process will be reviewed each year.

3. Timescales for the PDR

PDR discussions should take place between January and March each year, with the form completed by both the Reviewer and Reviewee by end March.

The period under review will be the previous calendar year, ie a PDR undertaken in February 2023 will review the year 1 January – 31 December 2022.

The only exception to the above timescales are clinical academics who should follow the relevant timescales within their NHS Trust. Further guidance for clinical academics is given in [section 9](#) of this document.

4. Generating a PDR form

To generate the PDR form, the Reviewee should navigate to the “Performance” section of [MyWorkplace](#) and click on the Review Lifecycle.

The screenshot shows the iTrent Performance interface. On the left is a navigation menu with options like Home, My time, My pay, Learning, Performance (selected), and Org chart. The main content area is divided into two sections: 'Review lifecycles' and 'Review forms'. An orange arrow points to the 'Generate' button under the first lifecycle entry in the 'Review lifecycles' table. To the right is a calendar for December 2022.

Lifecycle name	Start date	Current stage	Stage target end date	Stage owner
Demo Annual Review Life Cycle	02 Dec 2022	Manager Completes Review Form	02 Dec 2022	Mx Manager Test

Form name	Start date	End date	Due date	Status	Rating	Attachments
Test PDR Standard 21/22	01 Jan 2022	31 Dec 2022	01 Jul 2022	In progress		

There will be a “Generate” button under the first part of the Lifecycle. Click this to generate the PDR form.

The screenshot shows the 'Generate PDR Form' screen. On the left is a vertical flowchart showing the lifecycle steps: Trigger, Complete PDR, Generate PDR Form (highlighted), Review Meeting, Reviewee Summary Comments, PDR Complete, and End. On the right, there are instructions and a 'Generate' button. An orange arrow points to the 'Generate' button.

Generate PDR Form

Target end date: 27/03/2023

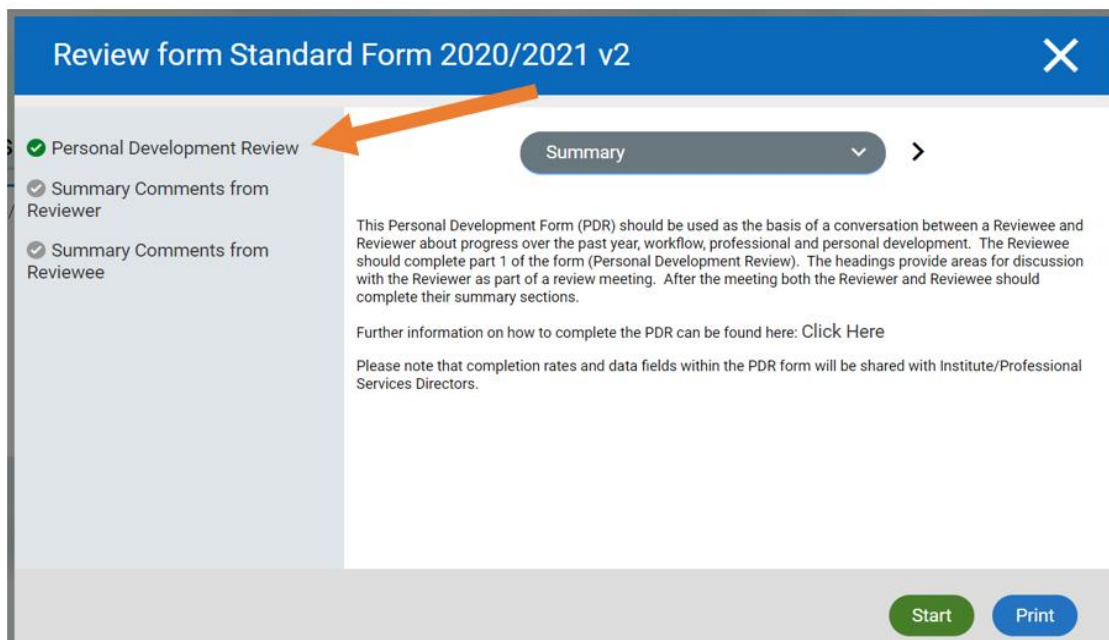
Action responsibility:

Please click on the GENERATE button below. This will open the review form. Please complete the form and rate your objectives before submitting.

Once submitted, the form cannot be amended. If you want to leave and come back to the form, please use the save button.

Generate

The Reviewee should complete part 1 of the form (Personal Development Review). To access part 1, click the words “Personal Development Review” to the left as seen in the below screenshot.



5. Review lifecycles

PDR forms operate using what are called “lifecycles”. There are five stages to the Lifecycle:

- 1) The Reviewee generates the PDR form by accessing the Review Lifecycle in [MyWorkplace](#) and clicking the “generate” button.
- 2) The Reviewee completes the Personal Development Review section of the form (part 1). They press “submit” once completed.
- 3) The Reviewer adds their summary comments. They then update the Lifecycle to confirm this.
- 4) The Reviewee adds their summary comments. They then update the Lifecycle to confirm this.
- 5) The Reviewer marks the PDR as complete.

The PDR form and the lifecycle are shown differently in MyWorkplace. Once the Reviewer or Reviewee completes their action, ie adds their comments, they should go into the Lifecycle and click “complete”. This will trigger an email to the other party to inform them.

For the Reviewee, the lifecycles can be found above the PDR form.

The screenshot shows the iTrent Performance interface. On the left is a navigation menu with options like Home, My time, My pay, Learning, Performance (selected), and Org chart. The main content area is split into 'Reviews' and 'Objectives' tabs. Under 'Reviews', there are two sections: 'Review lifecycles' and 'Review forms'. The 'Review lifecycles' section has a table with columns: Lifecycle name, Start date, Current stage, Stage target end date, and Stage owner. An orange arrow points to the 'Current' filter button above the table. The 'Review forms' section has a table with columns: Form name, Start date, End date, Due date, Status, Rating, and Attachments. On the right side, there is a calendar for December 2022 and a 'My events' section.

For the Reviewer, the lifecycle can be found under the PDR section of [People Manager](#), as shown below. The relevant lifecycle action must be set as complete in order for an email to be sent to the Reviewee to inform them that the Reviewer has created the PDR form or completed their summary comments.

The screenshot shows a user profile page in People Manager. It is divided into several sections: 'Personal' and 'Employment' (Occupancy started on 01/04/2022), a 'Calendar' (21 Dec 2022 - 03 Jan 2023) with circular progress indicators for 'Holidays remaining' (0 of 0 hours) and 'No sickness' (0 as of last calculation), and a 'LINKS' section. The 'LINKS' section contains buttons for 'Personal information', 'Profile', 'Employment', 'Absence', and 'PDR'. Below these are several links: 'Lifecycle', 'PDR Form', 'PDR Form Details', 'Add New Objective', 'View/Amend Objective', 'Add New Objective Progress', and 'View/Amend Objective Progress'. An orange arrow points to the 'Lifecycle' link.

The university requires that all PDR forms are completed by end March each year (with the exception of Clinical Academics who will need to follow NHS timescales within their Trust).

Completed PDR forms are available to view by Reviewees and Reviewers on MyWorkplace. If a new Reviewer is appointed, they will be able to see historic PDRs for the person they review.

6. Saving and Printing the PDR

The PDR form should be saved regularly, particularly before moving to a different page, otherwise additions will be lost. In addition, the form will be “timed out” after 3 hours (180 minutes) and therefore it is important to make sure that the PDR is saved within this timeframe.

Unfortunately, the PDR does not autosave due to system constraints imposed by the external provider. The PDR should therefore be saved at regular intervals.

A Word version of the PDR form is available on the [PDR website page](#) if a Reviewee would rather draft their comments in Word and then cut and paste it into the main form.

In order to print the PDR, open the PDR form and click on the “print” button at the bottom of the front page. This will generate a pdf version of the form. This can be saved and/or opened and printed as a pdf document.

It is also possible to zoom in on the PDR form. How to do this may depend on the web browser being used. Click on the three dots on the top right corner of the webpage and choose the “+” button to zoom until it reaches the preferred size.

7. Staff on Probation

The PDR form should be used for employees who have completed their probation period. There is a separate probation form for individuals who are on probation.

For individuals who have recently completed their probation period, eg completed probation in November prior to the PDR window January-March, the Reviewer and Reviewee should decide together whether to complete a PDR during the current PDR cycle or wait until the following year. A form will be created for all employees with more than 6 months service and therefore a form can be completed for somebody who has recently completed their probation. Objectives should be created for employees who have completed probation regardless of whether the full form is completed.

In many cases completing a brief PDR form for employees who have recently completed probation during the PDR window is good practice in order to ensure that the PDR cycle commences.

8. Setting objectives

Both the Reviewer and Reviewee can set and amend objectives. This can be done via the PDR form itself or in [MyWorkplace](#) - under “Performance / Objectives / +Add objectives. Objectives can be added or amended throughout the year as well as at the time of the PDR meeting.

Objectives should be SMART – ie Specific, Measurable, Achievable, Realistic and Timebound (ie have a completion date).

[← Back to Objectives](#)

Objective details

Personal objective



Objective Title (required)

Type (required)

Attachment date (required)

Description

Additional information

1. **NB when setting an objective, the “Personal Objective” box must be ticked.**
2. Provide a short name for the objective under “Objective Title”. This is a mandatory field and must be completed but is restricted to 80 characters.
3. The attachment date will automatically default to the date the objective was added. There is no need to change this unless either the Reviewer or Reviewee specifically wish to.
4. Add a description of what the objective covers, for example the nature of the objective, how it will be achieved and how it will be measured.
5. Add any additional information, if required, for example objective milestones.
6. As the name suggests, the start date is the date the objective became effective. This can be left blank if required.
7. Completion date should reflect the expected date of completion of the objective. This date can be amended over time should the objective be completed sooner or later than anticipated. The date can be left blank if the completion date is not yet known.
8. Objective rating method – there is no need to change this from UNISG.
9. A dropdown box is offered to provide a rating for the objective, choose the appropriate rating, which the Reviewee should agree with their Reviewer as part of their discussions. Possible ratings are:
 - Exceeded Expectations

- Achieved
- Partially achieved
- In progress
- Unable to achieve
- Not achieved
- No longer relevant

Objectives are shown on the PDR form when two conditions are met:

- The *Objective Start Date* is **before** the PDR Form was created; and
- The *Objective Completion Date* is **after** the PDR Form was created

The date the PDR form is created will be the date that the Reviewee generates the form. The PDR form will not show objectives which both start and end before the PDR form was created. Similarly, it will not show objectives that both start and end after the PDR form was created. In other words, the objective start and end dates have to straddle the date that the PDR form was created. If either or both the *Objective Start Date* and the *Objective Completion Date* are left blank, the objective will show on the PDR form.

Objectives appear in the Objectives section on the Performance page in [MyWorkplace](#) when the Objective Completion Date remains current (ie is not in the past). If the Objective Completion Date is left blank, it will also show in this section.

If the Objective Completion Date has passed, the objective does not show on the Performance page. To view objectives which have passed click on the “All” button towards the top of the page.

Objectives can be updated throughout the year, for example they could be amended after a mid-year review has highlighted changing circumstances or timescales.


9. Guidance for clinical academics

In line with the Follet principles, clinical academics should have a joint NHS appraisal/PDR. It is recognised that the timing of a L2P for clinical academics will be dictated by their NHS Trust requirements. In order to minimise the documentation being completed, clinical academics are able to upload their NHS appraisal - L2P - to the PDR form and are not expected to complete additional fields. However, clinical academics should comment under any heading that will assist them in their discussions with their Reviewer, in particular in relation to academic activities not covered in the L2P. If completing details on time spent on CPD it should accord with the formal definition of CPD relevant to the clinical role and not as outlined in the appendices for the Standard or Academic PDR form.

In order to upload a pdf of the NHS appraisal - L2P - click on the paperclip symbol under “Attachments” at the right of the relevant PDR form.

Review forms

All ✓ Current

Form name	Start date ↓	End date	Due date	Status	Rating	Attachments
Test PDR Standard 21/22	01 Jan 2022	31 Dec 2022	01 Jul 2022	In progress		

< Back to Reviews

Document attachments

No attachments have been added yet

+ Add attachment

As with all University employees, clinical academics are expected to have completed mandatory training. On the PDR form enter Yes or No to confirm whether all mandatory training has been completed. Add any comments, as required. The following lists the online training that must be completed by all University staff, as outlined in the [Mandatory Training Policy](#). Additional, specialist or face-to-face training may be required for specific roles. Online mandatory training modules can be accessed via [MyTraining](#).

- Health and safety training:
 - Display Screen Equipment (DSE) e-Learning
 - Display Screen Equipment: Risk Assessment
 - Fire Safety
 - General Health, Safety and Environmental Awareness
 - Manual Handling (all staff are asked to complete this online course even if their role does not generally involve manual handling)
 - Stress Management (only applicable to employees with line management responsibility)
- Information Governance:
 - Data Protection Briefing
 - Information Security Essentials
 - Introduction to Digital Accessibility
- Equality, Diversity and Inclusion (EDI) Training:
 - Managing diversity in the workplace
 - Let's Talk About Race training (or face to face inclusive practice training)
- Prevent Duty Training.

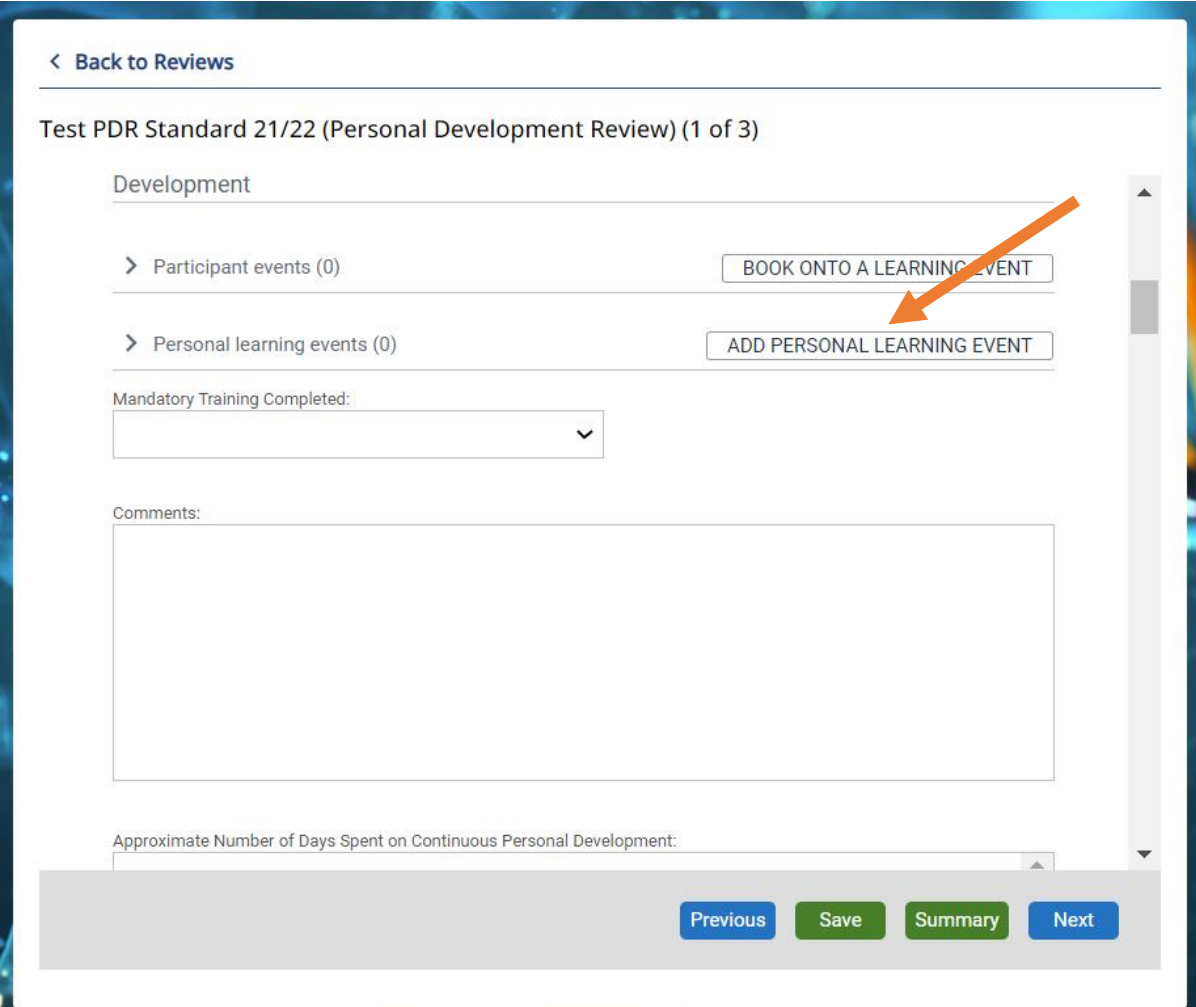
10. What to do if the Reviewer is not the Reviewee's Line Manager

MyWorkplace automatically assigns the individual who is listed as the Reviewee's line manager within MyWorkplace as their Reviewer. If this needs to be amended please contact HR (HRHelp@sgul.ac.uk).

It is not possible to assign a different Reviewer and Line Manager within MyWorkplace. If a PDR is to be undertaken by somebody who is not the Reviewee's line manager, the Reviewee should complete the form as described in this guidance and send a pdf of the completed PDR to their Reviewer so this can be discussed in the PDR meeting. [Section 6](#) describes how to create a pdf of the PDR form. The Reviewer should then write their comments in a Word document and ask the Line Manager or Reviewee to attach it to the PDR or cut and paste the comments.

11. Adding Personal Learning events to the PDR form

Personal learning events are events that are not organised by the University and that the Reviewee has added independently to their record, for example attendance at external courses, conferences or seminars. In order to add a personal learning event to a PDR form, you should click on the "Add Personal Learning Event" box in PDR form (under the development heading). Any mandatory training undertaken within the MyTraining portal will appear as a personal learning event.



The screenshot shows a web interface for a Personal Development Review (PDR) form. At the top left, there is a link labeled '< Back to Reviews'. Below this, the title of the form is 'Test PDR Standard 21/22 (Personal Development Review) (1 of 3)'. The main section is titled 'Development' and contains two expandable sections: 'Participant events (0)' and 'Personal learning events (0)'. The 'Personal learning events (0)' section is expanded, and a button labeled 'ADD PERSONAL LEARNING EVENT' is visible. An orange arrow points to this button. Below the 'Personal learning events' section, there is a dropdown menu for 'Mandatory Training Completed:' and a large text area for 'Comments:'. At the bottom of the form, there is a field for 'Approximate Number of Days Spent on Continuous Personal Development:' and a navigation bar with buttons for 'Previous', 'Save', 'Summary', and 'Next'.

12. Data Reports

The PDR system makes it possible for St George's, University of London to collate information benefiting staff and the University. For example, information gathered can support funding applications (such as REF, TEF, MRC-LID, BHF studentships, etc), supports a range of

programmes that St George's, University of London is committed to (such as Athena SWAN and HREIRA) and assist with regulatory reporting requirements (GDPR, Health & Safety, etc). It may also help identify gaps in resourcing, issues with workload distribution and flag up the need for particular resources.

During the PDR window, Directors receive a weekly report including the following information:

- List of employees for whom a PDR has been started.
- Completion of mandatory training.
- Number of days spent on Continuous Personal Development.
- Teaching hours.
- Reviewee and Reviewer Summary Comments.
- Issues to be raised with the Director (both Reviewee and Reviewer comments).

Personal confidential material within the PDR is stored securely, and in accordance with the principles set out in the Data Protection Act 2018.

13. Midway Review Meetings (June – August)

Holding a midway review meeting halfway through the year supports best practice to check-in on a Reviewee's objectives at regular intervals after the PDR window (January – March). A midway review meeting provides a chance to share feedback in a more relaxed setting than in the PDR meetings. Checking-in is a crucial part of the Reviewer/Reviewee communication chain, which is also done through regular 1:1s. Conducting a midway review meeting allows Reviewers an opportunity to do the following:

- Assess informally that goals are understood and are being worked toward
- Provide positive feedback on work to date or accomplishments and constructive feedback on performance.
- Discover and identify roadblocks that may prevent employees from achieving their goals or hinder their performance
- Adjust goals if individual, organisational or departmental needs or priorities have changed.
- Discuss employee satisfaction and head off any issues.

Checking-in frequently with direct reports assists in building relationships and a cohesive team. A six-month midway review meeting allows for adjustments and helps to prevent surprises during the annual PDR window (January – March). At present it is not possible to add a midway review to the PDR form but an informal record of the meeting should be made.

Appendix 1: Completing the Standard PDR Form

The standard review form should be used for Professional Services and Support staff as well as Research Assistants, Research Fellows, Teaching Fellows etc. However, a Reviewer and Reviewee may consider that the academic form is more appropriate for somebody on an academic career path, for example soon to apply for a Lecturer post. Where this is the case, please contact HR (HRHelp@sgul.ac.uk).

As a Reviewee, the form provides a framework for you to reflect on your achievements over the year and your development aims and to discuss these with your Reviewer. However, it is ultimately your form and it is for you decide how much or how little you wish to write in it.

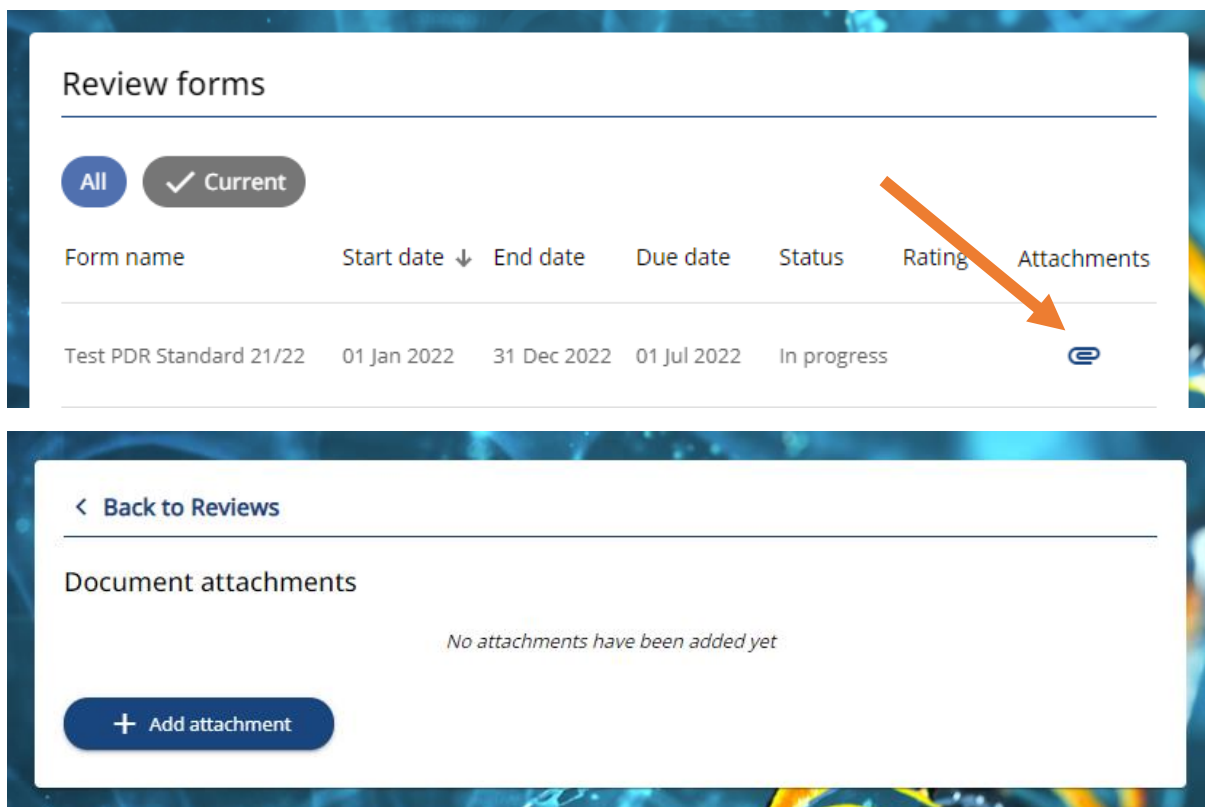
Completing the form:

1. Personal details are automatically populated from MyWorkplace. If any of the details are incorrect, eg the name of the Reviewer, please contact HR (HRHelp@sgul.ac.uk).
2. Objectives – objectives that remain open (ie have a future dated or blank completion date) will be included in the PDR form. Objectives can also be reviewed on the “Performance” page of MyWorkplace.
3. Development – details of courses attended over the review period are automatically entered on the form. These details can also be found in MyWorkplace under the “Learning” tab. Personal learning events are also included. These are events that the Reviewee has added independently to their record, for example attendance at external courses, conferences or seminars. [Section 11](#) outlines how to add a personal learning event.
4. Mandatory training completed – enter Yes or No to confirm whether all mandatory training required for your role has been completed. Add any comments, as required. The following lists the online training that must be completed by all University staff, as outlined in the [Mandatory Training Policy](#). Additional, specialist or face-to-face training may be required for your specific role. Online mandatory training modules can be accessed via [MyTraining](#).
 - Health and safety training:
 - Display Screen Equipment (DSE) e-Learning
 - Display Screen Equipment: Risk Assessment
 - Fire Safety
 - General Health, Safety and Environmental Awareness
 - Manual Handling (all staff are asked to complete this online course even if their role does not generally involve manual handling)
 - Stress Management (only applicable to employees with line management responsibility)
 - Information Governance:
 - Data Protection Briefing
 - Information Security Essentials
 - Introduction to Digital Accessibility
 - Equality, Diversity and Inclusion (EDI) Training:
 - Managing diversity in the workplace
 - Let's Talk About Race training (or face to face inclusive practice training)
 - Prevent Duty Training.
5. Approximate Number of Days Spent on Continuous Personal Development (CPD) – please estimate how much time you have spent on personal/professional development over the review period. There is no minimum of maximum limit to CPD and it will vary according to your role and professional status, for example you may be studying for an external qualification and have undertaken CPD in your own time. Personal/professional development activities include:

- a. Meetings outside usual work requirements, eg membership of committees, working groups or task and finish groups.
 - b. Meetings with mentor or mentoring.
 - c. Journal club.
 - d. Seminars, workshops and symposiums - internal and external.
 - e. Conferences.
 - f. Training courses - internal and external.
 - g. Public engagement activities.
 - h. Recruitment activities, eg staff and student interviews.
 - i. Team building events.
 - j. Peer support.
6. Research and Education, if relevant - add your contribution to research and education if relevant to your role.
 7. Which Support and Professional Development has Enabled you to Develop your Skills, Knowledge and Expertise in your Role in the Last 12 Months? Reflect on your personal development over the past 12 months and the impact it has had.
 8. Workload distribution – your full-time equivalent (FTE) will be automatically populated. This reflects your contracted hours, 1.0 represents full-time, less than 1.0 reflects a part-time working pattern.
 9. Additional Roles/Responsibilities (eg Working Group Membership, Fair Recruitment Specialist, Mentoring, Teaching if relevant). Outline any additional roles or responsibilities you undertake which are in addition to your core job requirements.
 10. New Responsibilities taken on over the course of the review period – outline any new responsibilities since the beginning of the review period.
 11. Significant Absence – provide details of any significant absence which may have impacted your work over the review period, for example maternity, adoption, shared parental leave or sickness absence.
 12. Consideration of Work-Life Balance/Flexible Working – add any relevant comments about your work-life balance or flexible working that you undertake or would like to undertake. It is important that these comments form the basis of a conversation with your Reviewer, especially if you wish to review your working pattern or make changes.
 13. Do you Have Line Management Responsibility? If Yes, please comment on Leadership and Management Skills – comment on whether you are a line manager and reflect on your management and leadership skills. For example, consider whether there are any areas of leadership or management that you would like to develop further.
 14. Support and Development to Assist with the Achievement of Objectives – comment on any support you feel you will require to assist you in the achievement of your objectives going forward. This does not necessarily have to relate to training courses or industrial upskilling but could include additional support you may like to request from your Reviewer or elsewhere eg buddy/mentoring or work-shadowing.
 15. Career Development Aims for the Next 12 Months – comment on any career development aims you have for the next 12 months. Again, this should form the basis of a conversation with your Reviewer about your aims, including what support, if any, you would like to assist you in meeting your aims.
 16. Markers of Esteem – include any markers of esteem related to your work, for example membership of professional bodies or external committees.
 17. Public and Civic Engagement, Widening Participation and Inclusive Education Activities – include details of your involvement in public and civic engagement, widening participation and inclusive education, if relevant. This could include, but is not limited to community engagement, school outreach, civic engagement, public talks, engaging or involving the public/patients in research.

18. Contribution to Equality, Diversity and Inclusion at St George's - include examples of how you have contributed in the year to support equality, diversity and inclusion (EDI) work at an individual, local or institutional level. Examples include work on inclusive education, attending EDI training, events, seminars or network meetings, membership of an EDI related committee, participating as a Fair Recruitment Specialist, demonstrating inclusive behaviour, completing equality impact assessments, contributing to EDI consultations and/or action planning. Areas of focus are listed annually in our [PSED reports](#), this list is not exhaustive.
19. Any other comments – add any additional comments that you have not been able to include elsewhere.

Please note that the free text boxes have a character limit of 2,000 characters. If you wish to write more, it is possible to add attachments to the PDR form, eg a Word document, by clicking on the paperclip on the PDR form and choosing the relevant file, as shown in the screen shots below.



As you are completing part 1 of the PDR form remember to click Save to avoid losing your work. Once you are happy with your form, click Submit. An email will then be sent to your Reviewer to inform them that this is complete and that they are now able to add their summary comments.

You should discuss the comments you have made, or intend to make, in the PDR section of the form with your Reviewer at a PDR meeting. After (or during) this meeting, the Reviewer should complete the “Summary Comments from Reviewer” section of the form, including any issues they feel should be raised with the Director. The Reviewee should complete the “Summary Comments from Reviewee” and can also include any issues they feel should be escalated to the Director. The Reviewer needs to mark their summary comments as completed in the lifecycle first, but both the Reviewer and Reviewee can complete their sections

independently and at the same time. Both can also see what the other party has written at any time.

If you do not agree with any elements of the feedback in the “Summary Comments from Reviewer”, you should contact the Reviewer to discuss this, indicating why you would like feedback to be changed. Your Reviewer will then have the opportunity to amend their feedback, if appropriate, in the PDR form following this discussion.

Appendix 2: Completing the Academic PDR Form

The Academic Form is designed for Lecturers, Senior Lecturers, Readers, Associate Professors and Professors. It is broadly structured around the academic promotions criteria. However, there may instances where a Reviewer and Reviewee agree that it is appropriate for other employees to use the Academic PDR form. Where this is the case, please contact HR (HRHelp@sgul.ac.uk). Where an academic has joint membership of Academic Institutes it is expected that the Reviewer will obtain feedback from the other Institute for inclusion in the PDR.

Academics who are considering applying for academic promotion should ensure that they have a PDR form completed within the year of their promotion application. It is also important to discuss promotion plans with your line manager a year before applying to ensure that you have support and to discuss how to strengthen your application. The timing of this meeting should therefore have been the March prior to application (eg March 2023 if you are considering an application for March 2024). In addition, if an application for promotion is not successful, the PDR is a helpful forum to discuss why the application was not successful and to make plans for a future submission, usually in 2 years' time or later.

The Reviewee should complete part 1 of the form (Personal Development Review). Please note that the free text boxes have a character limit of 2,000 characters. If you wish to write more, it is possible to add attachments to the PDR form, eg a word document, by clicking on the paperclip on the PDR form and choosing the relevant file, as shown in the screen shots below.

The top screenshot shows a 'Review forms' section with two tabs: 'All' and 'Current'. Below the tabs is a table with columns: Form name, Start date ↓, End date, Due date, Status, Rating, and Attachments. The first row contains: Test PDR Standard 21/22, 01 Jan 2022, 31 Dec 2022, 01 Jul 2022, In progress, and a paperclip icon. An orange arrow points to the paperclip icon.

Form name	Start date ↓	End date	Due date	Status	Rating	Attachments
Test PDR Standard 21/22	01 Jan 2022	31 Dec 2022	01 Jul 2022	In progress		

The bottom screenshot shows a 'Back to Reviews' link and a 'Document attachments' section. Below the section is the text 'No attachments have been added yet' and a '+ Add attachment' button.

As a Reviewee, the form provides a framework for you to reflect on your achievements over the year and your development aims and to discuss these with your Reviewer. However, it is ultimately your form and it is for you decide how much or how little you wish to write in it.

Personal details:

1. Personal details are automatically populated from MyWorkplace. If any of the details are incorrect, eg the name of the Reviewer, please contact HR (HRHelp@sgul.ac.uk).

Objectives:

2. Objectives – objectives that remain open (ie have a future dated or blank completion date) will be included in the PDR form. Objectives can also be reviewed on the “Performance” page of MyWorkplace.

Education:

3. Education – complete details of your contributions in the education domain, including teaching, courses and type of teaching delivered, titles of teaching roles and teaching plans for the next year. You are expected to upload your teaching diary to the PDR form (teaching hours are requested later on the form). Please upload a complete year’s teaching diary, eg for the last full academic year as a single document. To do so click on the paperclip on the PDR form and choose the relevant file, as shown in the screen shots above.
4. Contribution to Curriculum Development – comment on your contributions to curriculum development.
5. Engagement with UKPSF – comment on your engagement with the [UK Professional Standards Framework \(PSF\)](#).
6. Education Qualification – use the dropdown list provided, which matches the levels required by HESA. The options are:
 - Successfully completed institutional provision in HE teaching (UKPSF accredited)
 - Holder of a National Teaching Fellowship Scheme Individual Award.
 - PGCE in HE, SE, FE, life long learning or any other equivalent UK qualification.
 - Accredited as a teacher of their subject by a professional UK body.
 - Other UK accreditation/qualification in teaching in the higher education sector.
 - Overseas accreditation or qualification for any level of teaching.
 - Recognised by Advance HE as Associate Fellow against Descriptor 1 of the UKPSF.
 - Recognised by Advance HE as a Fellow against Descriptor 2 of the UKPSF.
 - Recognised by Advance HE as a Senior Fellow against Descriptor 3 of the UKPSF.
 - Recognised by Advance HE as a Principal Fellow against Descriptor 4 of the UKPSF.
 - Recognised by SEDA against Descriptor 1 of the UKPSF.
 - Recognised by SEDA against Descriptor 2 of the UKPSF.
 - No academic teaching qualification held.
7. Personal Tutor – comment on whether you are a personal tutor and how many students. Include any additional information, for example feedback from your tutees or your experience of being a personal tutor.

Research:

8. Research - include your current research programme and research plans for the next 2-3 years.
9. Grants Awarded, Grant Applications – provide details of grants, including funder, dates, award amount, staff, your contribution and collaborators.
10. Papers Accepted and Submitted – detail papers, include all authors, title, journal and doi. Consider including alternative ways of describing your role and the importance and impact of the paper (in line with [DORA principles](#)).

11. REF Eligibility and Contribution - were you eligible, and expect to submit eligible papers in future? Did you submit an impact case or have plans to in the future? Do you have an up-to-date externally-facing ORCID?
12. Post-Graduate Supervision – comment on your PG supervision, students and their stage.

Practice (and Eminence):

13. Practice (and Eminence) - primarily for information about clinical practice. Further details for clinical academics is found under [section 9](#).

Innovation and Enterprise:

14. Innovation and Enterprise – include details of your involvement with innovation and enterprise activities, eg engagement in commercialisation or licensing activities etc.

Academic Leadership and Administration at SGUL:

15. Academic Leadership and Administration at SGUL - include additional roles/responsibilities (eg Associate Dean, membership of committees or working groups) and approximate time commitment.

Markers of Esteem:

16. Markers of Esteem - include external committee work, invitations to speak, grant reviews, professional societies, editor roles etc.

Public and Civic Engagement:

17. Public and Civic Engagement – include details of your involvement in public and civic engagement. This could include, but is not limited to community engagement, school outreach, civic engagement, public talks, engaging or involving the public/patients in research.

Widening Participation and Inclusive Education:

18. Widening Participation and Inclusive Education – include details of your involvement in widening participation and inclusive education activities.

Contribution to Equality, Diversity and Inclusion at St George's.

19. Contribution to Equality, Diversity and Inclusion at St George's - please include examples of how you have contributed in the year to support equality, diversity and inclusion (EDI) work at an individual, local or institutional level. Examples include work on inclusive education, attending EDI training, events, seminars or network meetings, membership of an EDI related committee, participating as a Fair Recruitment Specialist, demonstrating inclusive behaviour, completing equality impact assessments, contributing to EDI consultations and/or action planning. Areas of focus are listed annually in our [PSED reports](#), this list is not exhaustive.

Training completed:

20. Events – details of courses attended over the review period are automatically entered on the form. These details can also be found in MyWorkplace under the “Career & Development” tab. Personal learning events are also included. These are events that are not organised by the university and that the Reviewee has added independently to their record, for example attendance at an external courses, conferences or seminars. [Section 11](#) outlines how to add a personal learning event.

20. Mandatory training completed – enter Yes or No to confirm whether all mandatory training required for your role has been completed. Add any comments, as required. The following lists the online training that must be completed by all University staff, as outlined in the [Mandatory Training Policy](#). Additional, specialist or face-to-face training may be required for your specific role. Online mandatory training modules can be accessed via [MyTraining](#).
- a. Health and safety training:
 - Display Screen Equipment (DSE) e-Learning
 - Display Screen Equipment: Risk Assessment
 - Fire Safety
 - General Health, Safety and Environmental Awareness
 - Manual Handling (all staff are asked to complete this online course even if their role does not generally involve manual handling)
 - Stress Management (only applicable to employees with line management responsibility)
 - b. Information Governance:
 - Data Protection Briefing
 - Information Security Essentials
 - Introduction to Digital Accessibility
 - c. Equality, Diversity and Inclusion (EDI) Training:
 - Managing diversity in the workplace
 - Let's Talk About Race training (or face to face inclusive practice training)
 - Prevent Duty Training.
21. Approximate Number of Days Spent on Continuous Personal Development – please estimate how much time you have spent on personal/professional development over the review period. There is no minimum of maximum limit to CPD and it will vary according to your role and professional status, for example you may be studying for an external qualification and have undertaken CPD in your own time. Other than for clinical academics where CPD is more formally defined, personal/professional development activities include:
- Meetings outside usual work requirements, eg membership of committees, working groups or task and finish groups.
 - Meetings with mentor or mentoring.
 - Journal club.
 - Seminars, workshops and symposiums - internal and external.
 - Conferences.
 - Training courses - internal and external.
 - Public engagement activities.
 - Recruitment activities, eg staff and student interviews.
 - Team building events.
 - Peer support.

Workload Distribution:

22. FTE - your full-time equivalent (FTE) will be automatically populated. This reflects you contracted hours, 1.0 represents full-time, less than 1.0 reflects a part-time working pattern.
23. % FTE Paid by Trust – please enter, as a numerical value, the percentage of your FTE that is paid for by the Trust, if relevant.
24. Total Hours for Teaching Activity from Diary – please enter your total hours spent on teaching activities per academic year as a numerical value (if in doubt, use the last completed full academic year). As highlighted previously, you are able to upload your teaching diary to the PDR form. To do so click on the paperclip on the PDR form and choose the relevant file.

25. Total Hours for Teaching Roles - please enter your hours spent in teaching roles, as a numerical value.
26. Hours Remitted for Institutional Roles – please enter your hours spent in institutional roles, as a numerical value.
27. Total Hours – please enter your total hours, as a numerical value. Please note that a full-time working pattern is taken to be 1650 hours per year, which is the figured used by the TRAC system.
28. Significant Absence – provide details of any significant absence which may have impacted your work over the review period, for example maternity, adoption or shared parental leave, sabbatical or sickness absence.
29. Consideration of Work-Life Balance/Flexible Working – add any relevant comments about your work-life balance or flexible working that you undertake or would like to undertake. It is important that these comments form the basis of a conversation with your Reviewer, especially if you wish to review your working pattern or make changes. Consider whether a plan needs to be developed for adjustment and how the institute can help or support you with this.
30. Do you Have Line Management Responsibility? If Yes, Please Comment on Leadership and Management Skills – comment on whether you are a line manager and reflect on your management and leadership skills. For example, consider whether there are any areas of leadership or management that you would like to develop further.
31. Support and Development to Assist with the Achievement of Objectives – comment on support that would assist you to achieve your objectives, for example support from your manager, other teams or mentor.
32. Training Requirements - comment on any training support you feel you will require to assist you in the achievement of your objectives going forward. This could include Aurora or career development schemes, mentoring or coaching.
33. Other Resources - comment on any other support you feel you may need to assist you to achieve your objectives. This might include travel or bridging funds or additional support you may like to request from your reviewer or elsewhere, for example core resources which covers bioinformatics, statistics, BRF, IRF, specific colleagues, etc.
34. Which Support and Professional Development has Enabled you to Develop your Skills, Knowledge and Expertise in your Role in the Last 12 Months? - reflect on your personal development over the past 12 months and the impact it has had.

Career Development Aims for the Next 12 Months:

35. Career Development Aims for the Next 12 Months – comment on any career development aims you have for the next 12 months. You should consider promotion, application for joint membership of institutes, applying for specific fellowships etc. You should review the [St George's, University of London staff development guidance](#) on the web and discuss with your Reviewer your aims and the steps you may need to take to make an application, including what support, if any, you would like to assist you in meeting your aims.

Any other comments:

36. Any other comments – add any additional comments that you have not been able to include elsewhere.

You should discuss the comments you have made, or intend to make, in the PDR section of the form with your Reviewer at a PDR meeting. After (or during) this meeting, the Reviewer should complete the “Summary Comments from Reviewer” section of the form, including any issues they feel should be raised with the Director. The Reviewee should complete the “Summary Comments from Reviewee” and can also include any issues they feel should be

escalated to the Director. The Reviewer needs to mark their summary comments as completed in the lifecycle first, but both the Reviewer and Reviewee can complete their sections independently and at the same time. Both can also see what the other party has written at any time.

If you do not agree with any elements of the feedback in the “Summary Comments from Reviewer”, you should contact the Reviewer to discuss this, indicating why you would like feedback to be changed. Your Reviewer will then have the opportunity to amend their feedback, if appropriate, in the PDR form following this discussion.