PDR Form for Postdocs and Research Staff

Reviewee Name:

Current Grade:

School/Directorate:

Reviewer Name:

Date of review meeting:

The Personal Development Review (PDR) form for research staff:

* **Purpose:** Facilitate self-reflection and career development conversations between research staff and managers.
* **Key Focus:** Review and plan role-related objectives, personal and career development, and support from managers.
* **Not:** A performance review or research project meeting.
* **Key Benefit of the form:** Provides structure to the conversation between reviewer and reviewee.
* **Format:** Concise language, summaries, and bullet points encouraged.
* **Sharing:** Completed form should be shared and retained by both parties.
* **Additional Discussions:** Reviewees encouraged to discuss career plans with others (e.g. formal or informal mentors), but not share the completed form without the reviewer's agreement.

Companion guidance to this form is available for [reviewees](https://www.qub.ac.uk/sites/pdc/Storage/PDR%20for%20Research%20Staff%20Guidance%20for%20Reviewees%202024%20onwards.pdf) and [reviewers](https://www.qub.ac.uk/sites/pdc/Storage/PDR%20for%20Research%20Staff%20Guidance%20for%20Reviewers%202024%20onwards.pdf); it notably provides additional information on:

* Expectations of research staff and managers regarding the PDR process.
* Resources for exploring careers outside of academia. Note that line managers are not expected to be experts in this area, but rather to facilitate discussion and self-reflection.
* Clarification on the difference between role-related development and additional career development.
* Information on funding options for development activities.

Research staff with permanent appointments or those on an established academic career track may find it more beneficial to use alternative PDR forms designed for Professional Services Staff or Academic Staff respectively.

Further information and signposting:

* PDR resources: [PDC career development days and PDR page](https://www.qub.ac.uk/sites/pdc/Policyguidance/CareerDevelopmentDaysandPDR/) (guidance documents and videos for researchers and their managers); [PDR at Queen’s (People & Culture intranet)](https://qubstudentcloud.sharepoint.com/sites/int-peopleandculture/SitePages/Development%20and%20Career%20Progression/Personal-Development-Review-%28PDR%29.aspx): includes details on the process and general guidance and resources for all staff.
* [Development days policy for research staff (PDC website)](https://www.qub.ac.uk/sites/pdc/Policyguidance/CareerDevelopmentDaysandPDR/)
* [Researcher Development Concordat page (PDC website)](https://www.qub.ac.uk/sites/pdc/Policyguidance/ResearcherDevelopmentConcordat/)
* [Development pages on the PDC website](https://www.qub.ac.uk/sites/pdc/Development/): [Career development](https://www.qub.ac.uk/sites/pdc/Development/Careerdevelopment/), [Workshops and events](https://www.qub.ac.uk/sites/pdc/Resources/Workshopsandevents/), [Mentoring](https://www.qub.ac.uk/sites/pdc/Development/Careerdevelopment/Mentoring/), [Personal support](https://www.qub.ac.uk/sites/pdc/Development/Careerdevelopment/Personalisedsupport/), [Online learning](https://www.qub.ac.uk/sites/pdc/Resources/Onlinelearning/)
* [PROSPER: career resources and portal for postdocs and their managers](https://prosper.liverpool.ac.uk/) ([postdoc page](https://prosper.liverpool.ac.uk/postdocs/); [line manager page](https://prosper.liverpool.ac.uk/managers-of-researchers/))
* [Work-life balance guidance for research staff and their managers (PDC website)](https://www.qub.ac.uk/sites/pdc/Policyguidance/Work-lifebalance/)
* [University values and staff charter](https://www.qub.ac.uk/about/Leadership-and-structure/staff-charter/)
* [Vitae: resources related to researcher development](https://www.vitae.ac.uk/) (including the [Toolkit to enable managers to support early career researchers](https://www.vitae.ac.uk/doing-research/toolkits-to-enable-managers-to-support-the-development-and-progression-of-early-career-researchers))

# Section 1 - Context

To be filled by the reviewee:

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| **Contract end date** |  |
| **Number of development days1 available for the review period** |  |
| **Number of development days1 used during the review period** |  |
| **Specific considerations having impacted the review period**(e.g. period of extended leave, personal difficulties, length of the period if less than a year etc.) |  |
| **Number of development days1 for next review period** |  |
| **Specific considerations that may impact the next review period**(e.g. planned period of maternity leave, length of the period if less than a year etc.) |  |
| **Date of informal follow up discussion2** |  |

1Research staff at Queen’s are entitled to an allocation of up to 10 days per year (~80-100 hours) to spend on activities benefiting their career development, but not directly linked to their research. To facilitate development planning, we advise these are aligned with academic years. Staff working part-time, whose contract started or are due to end during an academic year receive a pro-rata allocation. Please view this allocation with flexibility and with the optics of promoting a reasonable amount of development each year; use approximations when estimating time spent and don’t be too rigid around this policy.

2The PDR process at Queen’s stipulates that the yearly PDR meeting should be supplemented by ongoing conversations during the year. While it does not require formal paperwork to be completed and is not monitored, we strongly encourage that research staff and their manager have at least one follow-up development-focused discussion (e.g. 6 months post PDR) to remind themselves of the agreed objectives, keep track of progress and potentially amend priorities. We suggest they agree a date and hold it in their diaries during the PDR meeting.

# Section 2 - career goals

Reviewees should identify two or three career goals, including the type of role, sector, and timeline for applying. If unsure, they should list "career exploration" as a goal. Progress made and gaps to address should be noted. These gaps will inform development goals in section 4 to ensure development efforts align with career aspirations. It is OK for career goals to change from a period to the next.

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| **Career goal**(e.g. type of position and/or employer) | **Timeframe for application** | **Progress towards goal / comments**(e.g. gaps identified, recent progress made etc.) |
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# Section 3 - Objectives and development related to the current review period

## Role-related development

Reviewees should list up to five role-related objectives agreed upon with the reviewer from the previous PDR meeting or the start of their contract. If objectives were not clearly defined, they can list main work aspects. When relevant, reviewees should then note development activities done in line with objectives (e.g., training, shadowing), reflect on progress, gained skills/experience, faced issues, and needed further development. It is acceptable for priorities to have changed.

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| **Role-related priority or objective** | **Associated development / learning activities** | **Progress and comments** |
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## Additional career development

Reviewees should list additional career development goals and actions not directly related to their role, previously discussed with the reviewer or undertaken since the last review or since starting their role. These activities are part of their 10 career development days or done in their own time. Reviewees can add unplanned activities and explain any uncompleted planned activities. They should estimate time spent on each goal and reflect on progress, learnings, and benefits. It is acceptable for priorities to have changed.

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| **Development goal / action undertaken**(e.g. skill, experience needed and concrete ways to do it) | **Approx. time spent** | **Progress and comments** |
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Manager actions agreed at the previous PDR:

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| **Agreed manager action**(Based on previous PDR; see bullet points in section 4 of previous form) | **Status**(e.g. completed, delayed, de-prioritised, not completed) | **Comments**(Reviewee to indicate benefits or other impact of the action; reviewer to indicate reasons for delays or no completion as relevant) |
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# Section 4 - Objectives and development for the next review period

## Role-related development

For the upcoming period, reviewees should draft a maximum of 5 main priorities and objectives related to their role. This list will be finalised during or after the PDR meeting, based on discussions with the reviewer. When applicable, reviewees should indicate the development opportunities or benefits associated with completing each objective, such as gaining new skills or enhancing their profile. If specific learning activities are required, they should be listed in the third column.

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| **Role-related priority or objective** | **Associated development / benefit (if relevant)** | **Learning activities needed (if relevant)** |
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## Additional career development

Reviewees should define additional career development goals unrelated to their current role, utilising their 10 development days (and potentially personal time). These goals should ideally align with their overall career aspirations outlined in section 2. Specific actions for each goal and estimated time should be listed. The number of goals is flexible, but reasonable considering the 10-day allocation and personal time commitment. Adjustments can be made if priorities change. During or after the discussion, reviewees should update their plans and note any actions their reviewers agreed to undertake to support their goals (e.g. introduce the reviewee to someone, provide an opportunity to teach, support them writing a fellowship etc.) in the bullet-pointed list below the table.

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| **Development goal / Actions**(e.g. skill, experience to gain, as well as concrete ways to reach them, e.g. attending a course, engaging with a programme, shadowing someone…) | **Approx. time required** |
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Reviewer actions agreed during the meeting:

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# Section 5 - End of review period summary

## Summary

The reviewee should write a summary of their year, highlighting specific achievements and challenges within their work, both in terms of tasks and their approach (e.g., collaboration, enthusiasm). They should reflect on how they contributed to their team and the broader environment, limiting this to 250 words. The reviewee can also mention any reflections or insecurities they'd like to discuss with their reviewer, and comment on their work/life balance and overall experience within their team and environment. Following the meeting, the reviewer should add their reflections on the reviewee's achievements, work approach, and any suggestions for overcoming challenges discussed during the meeting.

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| **Reviewee comments** | **Reviewer comments** |
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## Next steps

Following the meeting, and based on discussions with the reviewee, the reviewer should summarise the most likely options for further employment beyond the reviewee's current contract. It is anticipated that most research staff on fixed-term contracts will seek new roles within or outside the university. However, in some cases, it may be possible to explore extending the current contract through various means like alternative funding, fellowships, or short-term projects. This is not a commitment, and there is no expectation that reviewees would necessarily want their contract extended, as it might not align with their career goals.

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| **Next steps (reviewer)** |
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