



WESTCOUNTRY
SCHOOLS TRUST



Personal Development Review (PDR)

Stronger Together...
Every Child in a Great School
Life-changing Learning

Turning WeST strategy into action

WeST holds a firm belief in giving each child every opportunity to learn and succeed in all that they do. Whilst we are a united family of schools who share common values and beliefs, all our schools are unique and hold their own identity. We believe that by working collectively, sharing what works well and jointly developing best practice, we are stronger together and can provide the very best education for our children. We are proud of our schools, staff and children, and thrive on the constant challenge to seek further improvement.

The Personal Development Review (PDR) process helps managers and their staff to establish a clear link between strategic intent, school/service improvement, department/team plans and individual goals, so that each of us understands our contribution in delivering the highest quality of education and the importance of our roles within our setting and within WeST.



Rob Haring
CEO
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We are committed to the development of knowledge, skills and experience for all staff to promote individual growth and development focused on the continuous improvement of our schools and service areas. PDR provides a structured but flexible system, underpins the development of all Trust staff, aids career progression and succession planning, and supports our workforce to adapt to the many challenges of the education system.

The use of the PDR policy will also provide a consistent experience for all staff where:

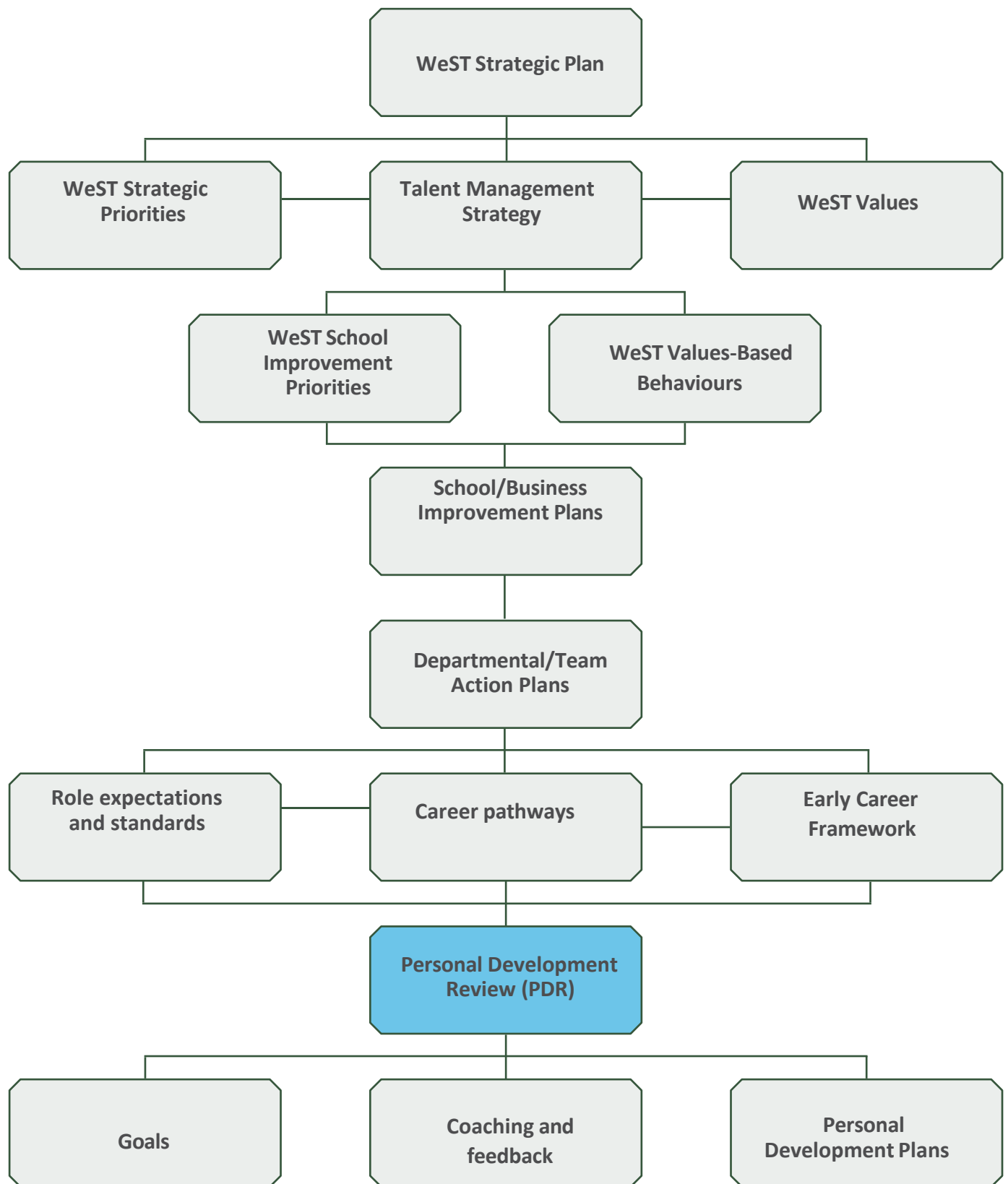
- the positioning of professional growth/support and career development are at the centre of dialogue to drive sustained school improvement longer-term;
- standards and expectations are clearly laid out (via the 'School Improvement Framework');
- staff are supported to manage and achieve within their own context (within a defined framework);
- future direction and priorities are clarified;
- individual contributions are recognised and valued;
- wellbeing, autonomy, job satisfaction and perception of workload manageability are discussed;
- individuals have goals which identify priorities and development plans that produce results for them and the Trust;
- goals are clearly linked to school improvement, and place emphasis on the growth of the individual to allow evidence of achievement to be demonstrated through impact and outcomes;
- there is regularity of feedback and dialogue between reviewers and reviewees;
- staff are enabled to reflect on how they are doing and what they might need to do to enhance their performance or develop their career further;
- obstacles are identified that may be impacting on achievement of goals or wider contribution and performance, and solutions discussed.

The PDR policy and this guide supports us in turning our strategies into action, working together to deliver what really makes a difference to our learners.

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Turning strategy into action: route map





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The purpose of PDR

Personal Development Review (PDR) is designed to provide a 'golden thread,' running from the WeST Strategic Plan, through School/Business Development Plans, departmental and team action plans to individual goals – the what. PDR also sits firmly within the context of Trust Values and values-based behaviours – the how.

Through promoting a clear understanding of each person's contribution, and how their performance makes a difference, we want to engage our staff in their part in shaping and delivering the very best education for our learners, creating a shared understanding of what success looks like.

The PDR process supports the development of a coaching and feedback culture, so that we can continuously develop and improve individual, team, school and trust performance.

Regular and timely development discussions will keep leaders and their teams connected throughout the year, ensure that individual levels of contribution are recognised, and that people are equipped to deliver what really matters.

The benefits of PDR

PDR will provide clear future direction and priorities so that each of us can see how we can personally contribute to the trust's success.

The creation of individual goals and areas for development will produce results for the trust as well as individuals. Regular feedback on contribution and performance supports a culture of continuous improvement and an opportunity to recognise the value we each bring and engage us positively towards further success.

PDR provides a mechanism through which we all know how we are doing and what we need to do to enhance our contribution and performance further.

PDR components

There are five main components of PDR.

1. The School Improvement Framework

PDR sits within a comprehensive School Improvement Framework providing clear and holistic performance and contribution expectations for all staff. The level and complexity of role will dictate the most relevant aspects of the framework to the reviewee.

2. Goal setting

Individual goals, focused on key priorities for the review period, which will contribute directly or indirectly to improving the progress of School Improvement outcomes.

3. Reviewing contribution and performance

Regular reviews (a minimum of three times per year) developing a culture of continuous improvement. Overall contribution and performance will be agreed as met, partially met, or not met.

4. Learning and development

Continuously developing our overall performance and contribution through personal development and CPD.

5. Keeping connected

Ongoing communication through regular conversations, supported by use of the BASICS coaching model.

Values

Stakeholders across the Trust were asked to define the values most important to them to sit at the heart of WeST. The following four values emerged, and summarise what the Trust stands for.



Collaboration

Creating a shared vision and working effectively across boundaries in an equitable and inclusive way to skilfully influence and engage others.



Aspiration

Works to high expectations, modelling the delivery of high-quality outcomes.

Showing passion, persistence and resilience in seeking creative solutions to strive for continuous improvement and excellence.



Integrity

Acting always in the interests of children and young people.

Acting with a consistent and uncompromising adherence to strong moral and ethical principles.

Communicating with transparency and respect, creating a working environment based on trust and honesty.



Compassion

Recognising need in others and acting with positive intention to promote well-being and improve outcomes.

Our values are integral to maintaining a positive working environment and creating a culture where people can succeed. They underpin our behaviour, emphasising that success is not just about what we achieve, but how we achieve it.

The values have been developed into behaviours providing exemplars of how they can be demonstrated. These are not exhaustive or intended to be prescriptive but are designed to encourage a broad understanding and support discussions that might highlight existing behavioural strengths and areas for further development.

The School Improvement Framework

PDR sits within a comprehensive School Improvement Framework which provides clear and holistic performance and contribution expectations for all staff.

This will be comprised of a number of elements according to your specific role:

- Organisational values and values-based behaviours
- Trust Strategy/Action Plans
- School/Business Development/Improvement Plans
- Departmental/team plans
- Objectives and Key Results (OKRs) and Key Performance Indicators (KPIs)
- Quality Reviews/Audits/100-day plans
- Early Career Framework (ECF) for early career teachers (ECTs)
- TLR framework
- Career pathways/grade expectations
- Job descriptions
- Teachers/apprenticeship standards
- CPD offer

The relevant elements set the context for your school/business unit, team and role, and provide a framework of measures and expectations relevant to overall performance, but also within which to set your specific goals. It is therefore important, prior to any PDR conversation, that the reviewer and reviewee are familiar with the relevant aspects of the framework and how they apply to your role.



Overview of the PDR process

STEP ONE

Communicating the strategic narrative and defining the School Improvement framework

WEST Executive Leadership Team:

Publish and share the WeST strategy for the following academic year, including the School Improvement priorities

School/Business Unit Leadership Teams:

Publish and share School/ Business Improvement Plans

REVIEWER:

Share the Trust Strategic Plan, School/Service Improvement Plan and any other supporting department or team plans.

Ensure that PDR meetings are arranged with your team

REVIEWEE:

Develop an understanding of the Trust Strategic Plan, School/ Service Improvement Plan and any other supporting department or team plans.

Liaise with reviewer to ensure your PDR is scheduled.

STEP TWO

Preparations for the PDR meeting

REVIEWER:

Reflect on the reviewee's performance, what feedback you want to give against previously set goals and what suggestions you may have for new goals and development.

Review and consider the PDR form received in advance from the reviewee and how this will steer your approach to the meeting.

REVIEWEE:

Consider your performance against previously set goals .

Consider potential future goals, in-line with the relevant parts of the School Improvement Framework.

Capture some basic thoughts to inform discussion on the PDR form and send this to your reviewer in advance.

STEP THREE

Holding the PDR meeting

REVIEWEE AND REVIEWER:

Using the PDR form, agree together the agenda for the meeting, to support meaningful two-way conversations

exploring:

- General health, wellbeing and workload
- Review of contribution and performance against any previously set goals
- Clarify the 'School

Improvement Framework' and how it applies to the reviewee's role

- Consider Personal career aspirations/development relevant to current or aspirational roles
- Agree personal development goals, including anticipated barriers, impact and outcomes
- Confirm the date of the next PDR meeting

Capture a summary of the meeting on the PDR form

STEP FOUR

Refine goals

REVIEWER:

Provide a draft of the form created at the meeting to the reviewee, allowing them to consider and finalise their goals.

Once returned, consider the reviewee's proposed final goals.

If necessary discuss further.

Reflect in readiness for amendment/finalising.

REVIEWEE:

Give further thought to discussions around priorities for the next review period to shape your final goals (discuss further with reviewer if needed).

Finalise goals on the form and return to the reviewer for their agreement.

STEP FIVE

Agreement and finalising the records

REVIEWER:

Further reflect on the meeting and the main points of discussion.

Sign and share the completed form with the reviewee for agreement that the summary of your conversation is fair and accurate.

REVIEWEE:

Sign PDR form to confirm that it represents a fair and accurate summary of the conversations held at the meeting (and any agreed actions/goals that may have followed).

Return the completed form to the reviewer.

STEP SIX

On-going dialogue

REVIEWEE AND REVIEWER:

Continue to meet regularly throughout the review cycle, both in further scheduled PDR meetings but also informally if possible.

Provide regular two-way feedback.

Continue to review the formal goals and development plans, making any required tweaks and amendments as the cycle progresses.

Goal setting

What is a goal?

A goal will contribute to an employee's own personal development and contribution, with the aim of supporting the achievement of the school/service Improvement Plan and overall Trust Strategic Plan. It should be clear, if achieved, how individual goals will contribute directly or indirectly to improving the progress of school/service improvement outcomes. For some support roles this might be best demonstrated through departmental or team action plans which support the school/service improvement plan.

Goals for each employee will be agreed as soon as practicable within the cycle, although in some instances, where appropriate, might be agreed mid cycle or span more than one PDR cycle.

How many goals will I need?

Staff will ideally have three goals covering their role and/or team priorities focused on the following:

1. Whole school/service goal aligned with the school/service Improvement Plan
2. An individual personal goal aligned with the school/service Improvement Plan
3. Personal professional learning goal linked to career stage and appropriate professional development or training

However, we do recognise that for some staff groups or roles, it might prove difficult to identify three goals. In this instance the reviewer may agree to a lesser number.

What should my goals look like?

- They should take account of:
 - the level of the role and the reviewee's career stage and/or experience;
 - any standards and/or performance criteria and/or career stage expectations (for teachers) and/or any professional or required workplace standards. Such expectations/standards will be available to staff before, or as soon as practicable after, the start of the review period;
 - the reviewee's professional career aspirations;
 - personal workload and wellbeing;
- They should focus on the key priorities for the review period.
- They need to be mutually agreed by the reviewer and reviewee. Where joint agreement is not reached the decision will rest with the reviewee, who may consult a more senior manager if appropriate.
- They should be adaptable so that they can change with Trust priorities. In some cases, it may be appropriate to agree a change to current goals, or even set new goals as a part of a mid-cycle check-point review.
- They should have an emphasis on individual growth and allow for evidence of achievement to be demonstrated through the impact of day-to-day practice and the delivery of outcomes linked to the School or Service Improvement Plan;
- They should be clear and focused.
- They may include success criteria, steps towards achievement, and the evidence that could be used to demonstrate achievement; careful thought should be given to the appropriateness of numerical goals or success criteria.
- They have regard to what can reasonably be expected given the desirability of being able to achieve a satisfactory work/life balance.



How to get the most out of your PDR: tips for reviewees

The success of your PDR will depend on how you approach it. It will be important to gain a clear understanding of how your performance and personal contribution fits into the School or Service Improvement plan. In some cases this might best be demonstrated through departmental or team action plans which support the School or Service Improvement Plan.

As a reviewee, to get the best out of your PDR review meetings:

Prepare

- Familiarise yourself with the School Improvement Framework and how this applies to you and your role.
- Schedule time in beforehand to reflect on how you feel you have performed against your previously set goals.
- Reflect on key highlights since your last review meeting.
- Consider your strengths, areas of expertise and skills.
- Consider your own career aspirations. Do you want to improve as best you can in your current role, or progress/move to another? And, what further learning and development do you need to accomplish this, both short and long term?
- Think about potential goals for the next review period and be prepared to explain how these contribute to school/business improvement.
- Speak to your colleagues to seek feedback.
- Identify any other key points that you would like to discuss with your reviewer.

During the meeting

- Adopt a partnership approach. Whilst it is not unusual for strategic and operational objectives to filter down from Trust Executive, senior leaders, middle leaders and team leaders, it is important to come to the meeting on an equal footing. Through a coaching-style conversation you should be encouraged to put forward your views and take ownership of your progress and development.
- Be honest. A key factor to achieving a successful meeting is being open and honest. Whilst setting

goals and receiving feedback are important, the process also provides a platform for you to share any concerns or frustrations that you may be experiencing at work. PDR meetings provide an opportunity for you to be open with your reviewer about what's really going and any barriers that you may be facing, so that you can work together to overcome these.

- Be prepared to take constructive criticism. Remember that honesty is a two-way process and not only should you approach the review process with openness, so should your reviewer. Criticism should also be delivered in a constructive manner and viewed as a supportive mechanism to improve performance and the overall experience at work. It is recognised that criticism can be hard to hear, even if delivered in a sensitive and supportive way. However, to be able to learn and develop it is important to listen to other people's opinions or consider something from another perspective.
- View problems as opportunities. Accepting that from time-to-time problems are an inevitable part of working life (not necessarily a weakness). It is important to reflect on past performance and consider what could be done better next time or share innovative ideas to find solutions that support a positive culture of growth. Don't be afraid to raise any problems at your review meeting that it would be beneficial to discuss.
- Take ownership of your own personal development. The PDR process removes the passive role that many may have taken previously towards their own personal development, where it is common for training to take place under instruction. Instead, individuals are encouraged to take the lead in the design and implementation of their own development within their own role. This means not only discussing where you are now, but the direction you want to be heading in and what you need to do to achieve this.
- Hold responsibility for the process. PDR meetings take place at regular intervals throughout the cycle and protected time needs to be calendared. Both reviewer and reviewee are responsible for ensuring that not only do the review meetings take place, but also that talking points flow from previous reviews and goals are clear and achievable. If you are not satisfied with the process, please raise this with your reviewer in the first instance, explaining clearly what concerns you have.



How to get the most out of your PDR: tips for reviewers

Foremost reviewers need to assess and agree the expected levels of contribution and performance with their reviewees. In doing so they should provide a clear understanding of what needs to be achieved whilst furnishing reviewees with the support and encouragement needed to reach goals that have been set.

PDR meetings are not intended to be completed in isolation but are instead a continuation of previous discussions.

To ensure you get the best out of PDR review meetings with your team:

Prepare

- Fully understand the School Improvement Framework and be knowledgeable about how the work of your team and individuals within it can contribute to positive outcomes which are aligned with this.
- Protect time for the meetings and book a space where you will not be interrupted; this is a reviewee's opportunity to have your undivided attention to focus on them.
- Review the previously set goals and carefully consider the reviewee's strengths in these areas, as well as any potential areas of development.
- Consider what training and development could be offered that would be appropriate to the individual.
- Think about how the reviewee may be feeling, how they may react to the meeting and ensure that you are prepared to deal with this in a positive way.

During the meeting

- Listen and be present. PDR provides colleagues with the platform to share their thoughts, opinions and in some cases concerns. Whilst actively listening, the reviewer is able to coach and encourage individuals to assess their performance and reflect on their personal development needs. Therefore, it is paramount that the reviewer takes a step back and allows the reviewee to explore and identify their needs and the next steps which could be taken to achieve this.
- Ensure your conversations are meaningful. Whilst the PDR meeting is about the reviewee, it should be recognised that some individuals may have little to say and could find it difficult to reflect and decide

where they fit into the bigger picture, or even where they could develop further. Through the application of coaching style conversations, the responsibility of the reviewer is to encourage colleagues to explore where they can contribute to the Trust, through the setting of appropriate and achievable goals. Signposting School/Business Development Plans, department or team action plans, making suggestions and providing constructive feedback may help to stimulate such conversations.

- Treat people as individuals. The key is to recognise that diversity is important within the workforce. As everyone is different you should therefore not expect everybody to respond the same to a single approach; for example, introverts may engage differently to extroverts. By genuinely listening to the individuals within your team, this will help you to differentiate how to interact with them to achieve the best version of them, whatever that may be. With an understanding of each of your team, you can support them to identify their goals by translating how the Trust's Strategic plan is relevant to their role.
- Encourage upwards feedback. Two-way feedback is a valuable tool, not only to build relationships and trust but also to enhance your performance and the performance of your team. As a line manager you may be doing something that negatively influences performance in the department, which you perhaps haven't considered. A PDR meeting is a great opportunity to ask your team what they need from you.
- Build trust. Strong relationships are centred on trust, and without trust the PDR process will not be successful. It is important that your reviewees feel that you as a line manager have their best interests at heart and want to help them succeed. As referenced in several of the points above, there are many ways to build a foundation of trust, but primarily the crucial factors are;
 - listen;
 - be supportive;
 - provide a channel for two-way feedback;
 - follow-up on agreements;
 - allow your team the autonomy to reach their potential; and
 - lead by example by practicing WeST's core values.



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PDR discussions and BASIC coaching

BASIC coaching training for line managers is part of the Trust's development offer designed to support all manner of management conversations including the delivery of PDRs. Positioning professional growth/support and career development at the centre of a PDR coaching conversation will help to drive sustained school improvement and business improvement longer-term.

Adapting a coaching style conversation allows us to harness the strong and proven correlation between autonomy, job satisfaction, employee engagement and performance, by providing the opportunity for staff to manage and achieve within their own context, but within a clear and defined wider framework of school/business improvement plans and career/role expectations.

Through a coaching conversation we are encouraged to establish goals with a greater emphasis on personal growth with the result that we are more strongly motivated and invested in achieving outcomes that can be demonstrated through evidence of impact on school or business improvement.

It is not a prerequisite for managers to have completed coaching training before delivering PDRs, but participation in the programme will enhance the process by enabling them to guide reviewees through the process, assisting them to establish desired goals and moving them from where they currently are to where they want to be, having a real impact on school improvement and business improvement.

BASIC STEPS

BACKGROUND

- ▶ What's on your mind?
- ▶ What's the situation?
- ▶ What's happened since we last met?
- ▶ What have you achieved?
- ▶ What's the real issue here?
- ▶ What else is relevant?

- ✓ **Try to shed your own perspective and enter your coachee's.**
- ✓ **Try to get to the root cause of the situation.**
- ✓ **Don't worry if you spend a long time on background.**

AIM

- ▶ What do you want?
- ▶ What does success look like?
- ▶ If you sorted this, what would the outcome look like?
- ▶ How would you feel if you achieved this?

- ✓ **Don't forget that you can come back to the aim if needed.**
- ✓ **Is your coachee's aim SMART (specific, measurable, achievable, relevant, time-bound)?**
- ✓ **Use the model: "By, I am, so that"**

STRATEGY

- ▶ What are your high-level options?
- ▶ What could you try here?
- ▶ What did you do that worked when have you been in a similar situation?
- ▶ What else could you do?
- ▶ Who can help?

- ✓ **Might Objective-Strategy-Tactics be useful?**
- ✓ **Use pros and cons or the binary decision-making matrix**
- ✓ **Revisiting background can help with ideas**

IMPLEMENTATION

- ▶ What do you think you need to do first?
- ▶ What are the obstacles here that you need to overcome?
- ▶ When is the best time to do this?
- ▶ What else do you need to plan for?

- ✓ **How much forward planning your coachee needs to do.**
- ✓ **Consider using Kotter's change model to help structure actions.**
- ✓ **Use the pre-mortem to identify and solve problems in advance.**

COMMITMENT

- ▶ Out of ten, how likely is it you will do this?
- ▶ What could you do to get this number higher?
- ▶ What could stop you achieving this?
- ▶ What can you do about this?

- ✓ **Sometimes it isn't necessary to check for commitment because your coachee is so bought in.**
- ✓ **Consider using Kim Scott's Radical Candour approach.**
- ✓ **Leave coachee feeling positive.**

BASIC QUALITIES

BUILD TRUST

- ▶ Can you say a bit more about this?
- ▶ Tell me why this matters to you.
- ▶ Can I share a model that might help with this?
- ▶ What do you find helpful about how our conversations are working?
- ▶ I've had an idea. Would you like to hear it?

- ▶ How do you thinking this happened?
- ▶ How has this left you feeling?
- ▶ This sounds tough. When you have dug deep before, what has helped you?
- ▶ Let's explore what you can do. Who can help you?
- ▶ You seem rather deflated by this.

REMAIN CURIOUS

- ▶ I'm interested in this. What did you do?
- ▶ Tell me more about that.
- ▶ What really matters to you about this?
- ▶ What do you think about this now?
- ▶ I'd be fascinated to know more. What happened next?

- ▶ What are you most pleased about that you have achieved since we last met?
- ▶ What have you tried before that has worked?
- ▶ How would you feel if this plan worked?
- ▶ Who would want to help with this?

BASIC HABITS

ASK FIRST

- ▶ Tell me more about this.
- ▶ What does success look like?
- ▶ How can you achieve this?
- ▶ What do you need to do first to get this started?
- ▶ Shall I show you one way you could do this?
- ▶ Could that work?

- ▶ Let your coachee know you are listening by nodding and looking attentive.
- ▶ Try to understand their perspective rather than impose your own.
- ▶ Talk less, listen more..
- ▶ What is it that they are not saying?
- ▶ Consider using *match-pace-lead*.

FRAME WELL

- ▶ Use open not closed questions.
- ▶ Use how and what not why.
- ▶ What could make this manageable?
- ▶ How could this work?
- ▶ What has stopped you doing this up to now?
- ▶ How will you know if this is affordable?

- ▶ It sounds like...
- ▶ I am wondering if what you mean is...
- ▶ Have I understood this correctly? Are you saying...?
- ▶ You seem to be suggesting... Tell me more about that.
- ▶ Do you mean...?

BASIC FEEDBACK

MAKE CONNECTION

- ▶ I thought that... was really good. I particularly liked... What were you most pleased with?
- ▶ What have I missed that you thought went well?
- ▶ I am curious about what you thought about...
- ▶ What do you want to focus on?

- ▶ You have identified you want to be better at... What do you think you could do?
- ▶ How do you think you can improve on that?
- ▶ What can I help with?
- ▶ From what I have shared, what might work for you?

FAQs

The aim of any PDR meeting is that the discussions are entered into by both parties in the spirit of trust and confidence.

Aspects of confidentiality: documentation

Where does my PDR form get filed?

Once the PDR form has been signed by both the reviewer and the reviewee, the final copy will be shared with HR so that it can be saved securely on your personnel record.

Who else sees my information?

The PDR process and review records generated under it must be treated with confidentiality and shared only where there is a professional basis to do so, i.e. the Line Manager, Senior Leaders, the Principal/Headteacher or other officers and Trustees as defined within the PDR policy.

What about personal information that I share in the review, which is not recorded on the paperwork?

There may be aspects of the discussion which the reviewer and reviewee agree should remain confidential, and not recorded on the PDR form. Depending on the nature of what information is disclosed, the reviewer may talk to you outside of the PDR meeting about further support that is available, and seek your consent to speak to others

If you wish for the information to remain confidential the reviewer should respect this, unless they believe that harm may come to you, or others by not sharing further with the relevant people.

Next steps after the PDR check-in

Who is responsible for progressing my CPD?

This should be discussed at the PDR meeting, as it may be different depending on what the CPD activities are. CPD can take many forms. If there is learning that you specifically wish to undertake then you will primarily be responsible for progressing this, however your line manager may also make arrangements for CPD for the department.

Can I get funding to support my CPD?

Potentially, depending on what it is that you are seeking to do. In some instances funding can be agreed to contribute to studies or the attendance of conferences, events, and webinars. There is also the apprenticeship route where studies are funded through the Trust apprenticeship levy. In addition to funded activities, many free CPD options are available.

What happens if I am not happy with the way my review was conducted?

If you are dissatisfied with your personal development review outcome you should in the first instance discuss this your reviewer, within 10 days of receiving the form, with the aim of resolving matters.

Should it not prove possible to resolve concerns, the matter will be referred to the line manager of the reviewer for further formal consideration. At this stage you may wish to seek the support of your trade union to provide support and guidance through the appeals process, as detailed within the PDR policy.

How about if I disagree with the goals that have been set?

In the first instance we recommend speaking to your reviewer to try and resolve any disagreements locally. If this is not possible, the matter will be referred to the line manager of the reviewer for further formal consideration.

