



Me and My PDR

Preparing for your Personal Development Review (PDR)

A workbook for staff involved in service delivery who are preparing for Personal Development Reviews

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Me and My PDR has been written by Jane Challinor and Rob Wood, drawing on *The NHS Knowledge and Skills Framework (NHS KSF)* and *The Development Review Process*, published by the Department of Health in October 2004, and ideas and approaches in NHSU's *Personal Development Review Toolkit*.

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There is no restriction on adapting and further developing the workbook to improve it or to reflect local circumstances. Where any revised edition draws significantly on *Me and My PDR*, then Jane Challinor and Rob Wood ask that their original work be acknowledged.

Jane Challinor and Rob Wood

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Welcome

Welcome to *Me and My PDR* – the workbook that has been designed to help you prepare for your Personal Development Review, which from now on in this workbook we are going to call your PDR.

The workbook has been designed so that you can use it:

- as a reminder of what you'd like to discuss in your PDR
- to collect evidence of your learning and development achievements
- as evidence of your learning and development activity.

You can keep this workbook entirely to yourself or share it with your PDR reviewer.

Throughout the workbook you will find learning activities designed to help you reflect upon the particular topic under discussion. You don't have to do these. However, if you choose to complete all the learning activities in this workbook thoroughly, then you should be able to use the workbook as evidence towards some of the NHS KSF dimensions in your NHS KSF outline. Your PDR reviewer can agree this with you.

Remember – your PDR is your opportunity to make sure you get the sort of training, education and development that will enable you to take forward your career in the NHS. Use this workbook and take the opportunity!

The NHS learning and development service offers advice on ways to learn, develop or get the qualifications you need to make the most of your skills and potential, whatever your job.

It is staffed by expert advisors holding relevant professional qualifications in advice and guidance and trained in health and social care.

Call a learning advisor now on 08000 150 850. Lines are open from 8am to 8pm, Monday to Friday, with an out-of-hours message and call-back service.

All calls are free and advice is impartial and confidential.

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Section 1: What are the NHS KSF and the PDR?

In this section you are going to read about the overall structure of the NHS Knowledge and Skills Framework (NHS KSF) and the Personal Development Review (PDR) process.

If you have any other information about the NHS KSF, keep it to hand so that you can refer to it as you work through this section.

What is the NHS KSF?

The NHS KSF defines and describes the knowledge and skills that NHS staff need to apply in their work in order to deliver quality services. The framework will be used to review staff learning and development needs.

The review is called the PDR and it is discussed throughout this workbook.

The NHS KSF and the PDR lie at the heart of the career and pay progression strand of Agenda for Change. They are designed to apply to everyone except doctors, dentists and some board level and other senior managers.

What is the purpose of the NHS KSF?

The purpose of the NHS KSF is to:

- develop the knowledge and skills of staff so that services continue to improve
- support the effective learning and development of individuals and teams
- support the development of individuals in the post in which they are employed so that they can be effective at work
- promote equality for and diversity of all staff.

How is the NHS KSF structured?

The NHS KSF is made up of 30 dimensions: six core dimensions and 24 specific dimensions. The dimensions identify the broad functions that the NHS requires in order to provide a good quality service to the public.

On page 3 you can see an example of a dimension as it has been applied to a band 5 occupational therapist.

Every job covered by the NHS KSF will have an **NHS KSF outline**. This will be made up of the six core dimensions plus a small number of the 24 specific dimensions – probably between two and six of them.

The **core dimensions**, which appear on everyone's NHS KSF outline, are:

- 1 Communication
- 2 Personal and people development
- 3 Health, safety and security
- 4 Service improvement
- 5 Quality
- 6 Equality and diversity.

The other 24 dimensions are specific – they each apply to some but not all jobs in the NHS. The **specific dimensions** are grouped into themes as shown below:

- 1 Health and well-being
- 2 Estates and facilities
- 3 Information and knowledge
- 4 General, including:
 - Learning and development
 - Development and innovation
 - Procurement and commissioning
 - Financial management
 - Services and project management
 - People management
 - Capacity and capability
 - Public relations and marketing.

Each dimension has **four levels**. Level 4 will make greater demands than level 1 does. Each level has a title that describes what the level is about.

Attached to the level titles are **indicators**. The indicators describe how knowledge and skills need to be applied at each level. You can see how levels and indicators are used in the example on page 3.

Learning Activity 1: A quick NHS KSF quiz (1)

Answer the following questions using the information given above.

- 1 Write down one purpose of the NHS KSF.

- 2 How many core dimensions are there?

- 3 Which dimensions will definitely appear in your NHS KSF outline?

- 4 What does a level title do?

How did you do? If you didn't answer all four questions correctly, pause for a moment and read through the section again or look for the answers on this and the previous page.

Remember: every job covered by the NHS KSF will have an NHS KSF outline. Yours will be no exception.

Learning Activity 2: Your NHS KSF outline

Take out your NHS KSF outline and highlight the dimensions, levels and indicators that have been described on pages 1 and 2 of this workbook. Make a note below of anything that you are unsure about.

You can ask your reviewer for an explanation of these.

Resource 1 is an example of one of the core dimensions – **Personal and people development** – at level 2 applied to a band 5 occupational therapist.

Resource 1: NHS KSF dimension applied to a band 5 occupational therapist

Dimension	Level	Indicators	Areas of application for this post
2 Personal and people development	Level 2 Develop own knowledge and skills and provide information to others to help their development	<p><i>The worker:</i></p> <p>a) assesses and identifies:</p> <ul style="list-style-type: none"> – feedback from others on his/her own work – how he/she is applying knowledge and skills in relation to the NHS KSF outline for the post – his/her own development needs and interests in the current post – what has been helpful in his/her own learning and development to date <p>b) takes an active part in the development review of his/her own work against the NHS KSF outline for the post with the reviewer and suggests areas for learning and development in the coming year</p> <p>c) takes responsibility for his/her own personal development and takes an active part in learning opportunities</p> <p>d) evaluates the effectiveness of learning opportunities and alerts others to benefits and problems</p> <p>e) keeps up-to-date records of his/her own development review process</p> <p>f) offers information to others when it will help their development and/or help them meet work demands.</p>	<p>Assessing and identifying feedback from others will mean:</p> <ul style="list-style-type: none"> • participating in regular professional and/or operational supervision. <p>Taking responsibility for own personal development will mean:</p> <ul style="list-style-type: none"> • participating in the basic grade development programme • participating in the NHS KSF development review. <p>Offering information to others will include:</p> <ul style="list-style-type: none"> • during induction • during ongoing work • to students on placement • when changes are being made to work practices.

What are the KSF gateways?

Under Agenda for Change most NHS staff switch to a common pay spine, where jobs are allocated to specific pay bands covering a number of pay points. There are nine pay bands.

At two defined points in a pay band – known as **gateways** – decisions are made about pay progression as well as development.

There are two gateways in each pay band:

- 1 the **foundation gateway** – this takes place no later than 12 months after an individual is appointed to a pay band, regardless of the pay point to which the individual is appointed
- 2 the **second gateway** – this is set at a fixed point towards the top of a pay band.

The purpose of the **foundation gateway** is to check that individuals can meet the basic demands of their post on that pay band.

The purpose of the **second gateway** is to confirm that individuals are applying their knowledge and skills to consistently meet the full demands of their post.

The ongoing PDR process supports people through these gateways.

Learning Activity 3: A quick NHS KSF quiz (2)

Answer the following questions using the information given above.

- 1 Give an example of how evidence could be provided to prove indicator f) in the example on page 3.

- 2 What has happened under Agenda for Change?

- 3 When do the KSF gateways happen?

Your PDR and Personal Development Plan

Everyone is expected to progress and develop throughout their time working in the NHS.

You and your PDR reviewer will together draw up your Personal Development Plan at your annual PDR interview. Your reviewer will usually be your line manager. Your PDR interview will focus on helping you develop to meet the demands of the NHS KSF outline for the post in which you are currently employed.

Your Personal Development Plan can focus on future career development once you have shown you can apply the knowledge and skills necessary for your current post.

Both you and your reviewer take responsibility for agreed parts of the development review process.

The PDR process is based on a cycle of learning. It consists of:

- a joint review between the individual and their reviewer – their line manager or another person acting in that capacity – of the individual's work against the demands of their post
- the production of a Personal Development Plan (PDP), which identifies the individual's learning and development needs and interests – the plan is jointly agreed between the individual and their reviewer
- learning and development by the individual supported by their reviewer
- an evaluation of the learning and development that has taken place and how it has been applied by the individual in their work.

Learning Activity 4: Find out about the PDR process in your Trust

Write down here when you will have your next PDR and who will be conducting it.

Date: _____

Reviewer: _____

If you would like full details of the NHS KSF and the PDR process, as well as post outlines and the full detail of the dimensions, levels and indicators, please visit the NHS Employers website at www.nhsemployers.org

Summary of Section 1

In Section 1 you have read about Agenda for Change, the KSF and the PDR process. It is your PDR that allows you to enhance and develop the skills and knowledge required for your job and your future career in the NHS.

The next section discusses how to be effective in your PDR interview.

Section 2: Being effective in your PDR**Feelings about previous experiences**

Preparing for your PDR doesn't just mean getting the evidence of your personal development together – it also means going into the interview with the right attitude: one where you are clear, calm, confident and assertive. You can develop these attitudes, but only if you are sure about your feelings about your PDR.

Learning Activity 5: First impressions

Write down your own feelings and thoughts about the PDR process.

Maybe you think it's a waste of time. On the other hand, you might be looking forward to having time to talk to your reviewer about your plans for the future. Try and view the process positively.

Highlight those items which you think show a positive attitude towards your PDR.

How you feel now about your PDR may be shaped by similar things you have done in the past. If you have had an appraisal or personal review in the past, how did it go? If you think it was a good experience, then you're likely to be looking forward to your PDR. If you didn't think much of it, then you might well not be expecting much from your PDR!

Remember though that these feelings belong to that event in the past. **You are more likely to get the best out of your PDR if you go into it with an open mind and are prepared to be positive about the experience.**

Learning Activity 6: Previous experiences

Write down some of the things you have experienced in the past in a PDR, appraisal or similar type of meeting. See if you can list them under positives and negatives.

Positives, eg I felt I was listened to – and there was an understanding of my needs and interests.

Negatives, eg I wasn't sure if the goals I set myself were reasonable – in the end I don't think I achieved them all.

Look at the list you've written. Now try to identify two items: one you definitely want to see happen and one that you definitely do not. Highlight these.

Things I would like to see take place in my PDR, eg I'd like to clearly identify some good training.

Things I don't want to see take place, eg I don't want to be pushed on to any old course.

Assertiveness

What part can you play in making your PDR a success? If you refer back to Learning Activity 6 about positive and negative experiences, you may think that you had some part to play in each. For example, if your reviewer didn't encourage you to talk about yourself as you would have liked or if they failed to challenge you sufficiently, perhaps you could have taken more control of the situation.

Passive behaviour is where you say or do nothing directly in response to another's behaviour – even when it is making you uncomfortable. The consequence is that you will agree on the surface with what is being proposed in the interview, but come out of it feeling upset and with little interest in pursuing what was agreed.

Aggressive behaviour usually means being angry, blaming the other person and even making rude responses. We are liable to do this in situations where we're not sure what's happening and it is uncomfortable or unsatisfactory in some way. Being aggressive doesn't necessarily mean we get our own way.

In your PDR you want to aim for:

Assertive behaviour, which involves expressing clearly how you think and feel, without judging the other person or seeking to blame them for how you feel. When we're being assertive we generally feel relaxed and that helps us to be more comfortable about the situation and to be . . . more assertive!

Learning Activity 7: Being assertive (1)

In the following situations, identify which would be the assertive response to make.

- 1 Somebody is smoking in the no smoking part of a pub.
 - a) You say: 'This is a no smoking area. Could you please put out your cigarette or sit in a different area.'
 - b) You move your seat, while muttering loudly that some people obviously can't read!
 - c) You storm over to the other person to tell them they are either stupid or inconsiderate or both!
- 2 In a PDR setting, your reviewer arrives late, appears disorganised and isn't listening properly.
 - a) You give minimal answers, contribute little and hope to get out of the room as quickly as possible.
 - b) You say: 'I don't feel I am getting what I need from this interview and it is important to me. I would prefer us to rearrange it for when you have more time.'
 - c) You get up to leave, saying: 'This is a complete waste of my time!'

Practise some assertive behaviour. In Learning Activity 6 you identified some things that you definitely wanted to see take place in your PDR and some things that you didn't want to take place. What could you imagine yourself saying that could help ensure that you got what you wanted?

Learning Activity 8: Being assertive (2)

Enter the items identified in Learning Activity 6 in the appropriate section below. Underneath each write down what you could imagine yourself saying in order to achieve your desired result.

Things I would like to see take place in my PDR, eg I'd like to clearly identify some good training.

'I'm especially interested in development which will help with my future career prospects.'

Your choice

Learning Activity 8: Being assertive (2) (continued)

Things I don't want to see take place, eg I don't want to be pushed on to any old course.

'I really want to do some training that is suited to my style of learning.'

Your choice

What to expect of your reviewer: skills checklist and feedback

Being more assertive can be easier when you are clear about what to expect from the process and what to expect from your reviewer. Remember that your PDR is about **your** training and development needs and you don't want to lose the opportunity to identify and properly plan your future development.

Here is a list of the ways in which PDR reviewers are being encouraged to behave.

- Prepare thoroughly for the review.
- Brief individuals on what to expect from the review.
- Ensure that there are no interruptions.
- Appear natural and friendly.
- Outline the purpose of the review.
- Invite the individual to add anything to the agenda.
- Ask appropriate questions to check the individual's understanding.
- Use examples.
- Discuss any constraints or frustrations.

If you intend to be effective in your PDR, then you may also want to be capable of behaving in the same way.

Learning Activity 9: Preparation

Write one sentence to say how you would demonstrate the behaviours listed.

- 1 Prepare thoroughly for your PDR, eg I would make a list of all the development activities I'd done in the last year.

- 2 Ensure no interruptions, eg I'd divert phone calls.

- 3 Maintain a relaxed and constructive atmosphere.

- 4 Check and clarify understanding.

- 5 Review objectives.

- 6 Explore constraints or frustrations that might lead to poor performance.

Giving and receiving feedback

Your PDR is your opportunity to receive constructive feedback about your performance in the job. Your reviewer should not be looking to apportion blame, or to make judgements or assumptions. Rather, they will approach the review in a spirit of partnership, seeking to find out with you how you have been doing.

For many of us, receiving feedback is a challenge – even when it is wholly positive (praise, for example, can be seen as embarrassing!). If your reviewer has points to offer about where you might need development, this can feel really uncomfortable.

So, here are a few tips on receiving feedback:

- Listen to what is being said.
- Keep an open mind – don't reject out of hand what is being said.
- Take notes to help you reflect later.
- Clarify what is being said. If necessary ask for more information or examples.
- Ask for feedback that you want but aren't getting.
- Give an honest response to what you hear.
- Reflect on it, and decide what, if anything, you need to take on board.
- Say thank you! Assume the feedback is well intended, and appreciate it for the gift it usually is.

Summary of Section 2

You've now completed Section 2 of the workbook. At this stage you should be able to understand the importance of the PDR process to your career development, and to start to consider how to present yourself effectively in your PDR interview.

The next section goes on to explain how you can use your PDR to think about your learning and development achievements and plans.

Section 3: Identifying your development needs

The outcome of your PDR

Your PDR will enable you, with the support of your reviewer, to produce a Personal Development Plan that identifies:

- the relevant NHS KSF dimensions in your job outline that you need to develop
- agreed learning or personal development activity
- the criteria by which you will know you have completed it
- the date by which it will be completed
- the support that you will need for it
- any barriers or constraints that may hinder your learning.

So how do you go about preparing for your PDR?

We suggest that you adopt a three-stage approach to thinking about your learning and development, which we've called:

1 CAN DO
2 WILL DO
3 HOW TO

What do these stages mean?

- CAN DO** = the skills and knowledge that you've already got and that seem to match your NHS KSF job outline.
- WILL DO** = the skills and knowledge that you think you ought to develop further because you haven't got them or because you want to make them stronger.
- HOW TO** = the learning opportunities or other activities that are likely to help you develop these skills and knowledge, or the people and agencies that can direct you to them.

Remember that you're doing this with your particular NHS KSF outline in mind. Let's practise this approach.

Part 1: CAN DO

In this part you're going to carry out some activities that will help you identify the learning and personal development you've achieved recently.

Learning Activity 10: CAN DO

Get your mind working by thinking about all the learning that's taken place over the past 12 months. Note down:

Any courses or workshops that you have been on (don't worry at this stage if you can't remember the exact title)

Any learning that's taken place at work as a result of 'doing and learning', eg have you learned how to operate a new piece of equipment? Or started to deliver a new service, or an old one in a different way? Or has there been a piece of legislation that you've had to learn about?

Any learning and personal development that may have taken place in your personal life or informally, eg perhaps you've joined your child's local school parents' association or your trade union branch committee, and have developed your confidence in taking part in discussions or planning events.

Spend a few moments reflecting on these and on the personal learning you've gained from them. Highlight any about which you are particularly pleased and which you would like to raise with your reviewer.

Let's turn now to the NHS KSF outline for your particular job to see how the personal development you have identified fits into this. You've seen already that it will contain the six core dimensions and a small number of specific dimensions.

We haven't got time in this workbook to explore all the dimensions in your NHS KSF job outline. We have chosen to use the **Communication** dimension at **level 1** (see page 16) because it is an example of a core dimension, so it will definitely appear in your NHS KSF job outline. You can go on to apply the same method to the other core dimensions and we've included a similar form in Section 5 at the end of the workbook to enable you to do this.

Let's see how the learning and personal development you identified in Learning Activity 10 corresponds to the **Communication** dimension **indicators**.

Learning Activity 11: CAN DO communication

Look at the learning and personal development activities you noted down in Learning Activity 10. In the CAN DO column in the 'Evidence of learning and personal development' grid on page 16 write down any that seem to match the Communication indicators. It is quite likely that one activity will match more than one indicator. If so, put it in more than once. If in doubt – write it in!

Don't worry at this stage about the WILL DO and HOW TO columns. We'll come to those soon.

Resource 2: Evidence of learning and personal development**NHS KSF dimension: Communication****Level 1: Communicate with a limited range of people on day-to-day matters**

Indicators	CAN DO	WILL DO	HOW TO
<i>The worker:</i> a) communicates with a limited range of people on day-to-day matters in a form that is appropriate to them and to the situation	a)	a)	a)
b) reduces barriers to effective communication	b)	b)	b)
c) presents a positive image of him/herself and the service	c)	c)	c)
d) accurately reports and/or records work activities according to organisational procedures	d)	d)	d)
e) communicates information only to those people who have the right and need to know it, consistent with legislation, policies and procedures.	e)	e)	e)

How many boxes have you filled in? You'll find it helpful to think not just about the learning activity itself, but what **you have learned** from it. For example, if you have just completed a one-day training course on Communications at Work, you'll want to think about what was covered in the course. Perhaps you did something about report writing or about the Data Protection Act?

If you did, then these could go in **CAN DO** boxes a) and e) of the evidence grid.

Have a look at the case study of Mark Tanner on page 18 and Mark's 'Evidence of learning and personal development' grid on page 19. You can see here examples of both formal and informal learning activities in which Mark has been involved and how these have been matched against the Communication dimension.

As you can see with Mark Tanner, some of the indicators won't always be demonstrated through attendance on a course or learning at work. Indicator c), 'presents a positive image of him/herself and the service', is a good example. Your ability to do this may well have been accumulated through your experience of hundreds of contacts with patients and work colleagues.

So how would you demonstrate this indicator? Perhaps you can think of an incident where you displayed this quality – for example, taking aside someone who appeared lost in the corridor and taking the trouble to get them to their right destination. Or perhaps your supervisor has commended you on your attitude to work. If you're really lucky someone may have written to thank you! On pages 21 and 22 you will find a list of activities that may be a source of evidence of accomplishments.

Learning Activity 12: More CAN DO

Go back to the 'Evidence of learning and personal development' grid on page 16 and note down any examples of these informal personal development experiences in the appropriate **CAN DO** box.

Resource 3: Mark Tanner case study

Mark Tanner joined the portering services at Borrowdale City Hospital earlier this year. In the last year of his previous job as a security officer in a local department store, he'd taken part in training in safe lifting procedures and first aid at work. Even in the limited time he'd been at Borrowdale, he'd done an in-house course on diversity and had got on to the waiting list for an e-learning customer care course. Not that there was much opportunity to use IT at work. As a porter, much of his work revolved around helping to receive patients when they arrived at the Casualty Unit and transferring them to wards, when their treatment required this.

Mark's foundation gateway PDR was coming up and the Head of Portering and Security Services, who apparently would do the review, had suggested that he should think about training needs. Mark had been given a copy of a workbook, *Me and My PDR*, which had been really helpful in thinking about his development needs.

When it came to completing the 'Evidence of learning and personal development' grid for the dimension of Communication, there wasn't a lot of formal training that Mark could use as evidence of meeting the standards. However, because so much of the work involved asking questions, giving straightforward information and passing on simple messages, Mark was able to give examples from his daily work and, in some cases, cite observations from the people with whom he worked.

Many of the users of the unit were from local ethnic community groups, and Mark felt they would find it extremely reassuring to be greeted with a few words in their own language. Mark also had a few ideas about signage in the hospital.

Mark was sure that at his review, with the support of his reviewer, he'd be able to demonstrate clearly his knowledge and skills at level 1 and identify areas for future development. The problem might be deciding which area to prioritise!

Resource 4: Mark Tanner's 'Evidence of learning and personal development' grid

NHS KSF dimension: Communication

Level 1: Communicate with a limited range of people on day-to-day matters

Indicators	CAN DO	WILL DO	HOW TO
<i>The worker:</i> a) communicates with a limited range of people on day-to-day matters in a form that is appropriate to them and to the situation.	a) I regularly talk to patients and their relatives and try to explain procedures.	a) Try to improve the way I work with difficult patients attending the unit.	a) Customer care course?
b) reduces barriers to effective communication.	b) At the diversity course I learned about how to make safe eye contact.	b) Put together some proposals for improving the signage in the unit and surrounding areas.	b) Talk to some of the staff and users of the unit and put together some ideas to raise at a future porters' meeting.
c) presents a positive image of him/herself and the service.	c) I make sure that patients attending the unit have proper contact details to pass on to relatives and friends.	c)	c) Customer care course?
d) accurately reports and/or records work activities according to organisational procedures.	d) I record all patient transfer activities in the unit log daily.	d) Familiarise myself with the procedure for reporting untoward incidents. Report incidents in a timely manner. Follow up action on reports with my manager.	d) Discuss incidents with my manager and reflect on what happened, how effective the reporting was, and what action is needed to prevent a similar occurrence in the future.
e) communicates information only to those people who have the right and need to know it, consistent with legislation, policies and procedures.	e) I regularly refer to my copy of the hospital's communication procedures to ensure that I'm following the right steps when talking to patients' relatives.	e)	e)

How far have you got in filling in the boxes in your grid on page 16? Don't be disappointed if you've not been able to fill them all in. When you take part in your PDR, your reviewer will run through these with you and will be able to identify other learning and personal development achievements that are hard to think about on your own.

Part 2: **WILL DO**

Turn now to the **WILL DO** section/column. Select one of the indicators for which you have nothing in a **CAN DO** box in your 'Evidence of learning and personal development' grid on page 16. That means that at the moment you can't think of any evidence that shows that you can do this. So what activity could you undertake – a **WILL DO**?

Use the indicator 'reduces barriers to effective communication' as an example. What activity could you undertake that would further develop this capability and your communication skills in general?

Are there things you can identify that stop you doing your job as you would ideally like to do it? Perhaps you could usefully think about your work situation and whether there are any particular examples of poor communication. Does the shift that is finishing hand over properly to the shift beginning? Does your work bring you into contact with diverse communities about whom you know little? Can you think of anything that could improve the situation?

Have a look again at Mark Tanner's evidence grid on page 19 to see the **WILL DO** activities that were identified there. These may give you some ideas.

Resource 5: Possible sources of evidence of learning

PDP records/appraisal records	These are probably your most useful resources for gathering evidence. Your Personal Development Plan (PDP) will have a section for recording progress towards the second gateway in the NHS KSF section as well as personal objectives and training plans.
Formal CPD records	If your professional body requires you to re-register periodically, then you will almost certainly be keeping some formal records of Continuing Professional Development (CPD). In many cases, this will be required in the near future if not at the moment.
Reflective practice diaries	Reflective practice is already encouraged in some clinical areas, usually within the scope of supervision or mentoring. It is an excellent learning method as it places responsibility for learning on the learner rather than on their manager or mentor.
Learning log	Records of learning opportunities can be compiled and referred to for NHS KSF reviews. To be truly valuable, they should include actions triggered by the learning and not just lists of attendance, objectives and programmes.
Adverse incidents	Adverse incidents may be positive as well as negative. They are events that sit outside the normal run of work and offer a real proving ground for competence.
General qualifications	Qualifications may offer some proof of competence but are usually only fully relevant within a few years of qualifying. After this, records of CPD are more pertinent.
National Occupational Standards (NOS)	National Occupational Standards, often known as NVQs, offer proof of competence for a period after attainment.
Departmental learning and development plans	Especially relevant for managers needing to demonstrate competence in people management, they may also be useful in other management dimensions.
Observations or other statements by third parties, including patients and other customers	These may be formal (observations) or very informal (letters of appreciation), but need to be carefully mapped to prove competence effectively.
Departmental records of performance or results	These are especially useful for those with management responsibilities. They can also be useful for roles where formal learning and development is not normally carried out after initial competence is established, eg domestic assistants.
Financial, resource, budget or other records of particular initiatives and actions	These may be used with care to demonstrate service improvement and results.
Results of simulation	Where the opportunities are not easily available, simulations may be used if they actually lead to improved competence.

Signposting	Indicating where individuals need to go to get the information or advice they need.
Direct observation	When observation is undertaken by your line manager or another senior member of staff.
360 degree feedback	Results of a an appraisal process that explores an individuals performance as viewed by colleagues and stakeholders as well as managers.

Perhaps you have identified already **CAN DOs** for all the indicators in the grid. In that case, ask yourself whether you want to develop further any particular aspect of your knowledge and skills.

Learning Activity 13: WILL DO – thinking about further development

Write down here the possible personal development activities that you could undertake at work or elsewhere.

Highlight the one(s) that would be a priority for you.
Write down here anything that you think might prevent you from doing this, eg cost, time, attitudes.

Return to the 'Evidence of learning and personal development' grid and in the **WILL DO** column tick any of the boxes alongside an indicator for which you would like to undertake further development. Choose one or two of the boxes, write in the development activities that you have identified.

Part 3: HOW TO

In your PDR, you and your reviewer will:

- look at the dimensions in your NHS KSF job outline
- discuss the different indicators involved in the dimensions
- jointly decide whether your skills and knowledge are at this level.

In your learning activities in this section you have already arrived at a list of **CAN DO** activities that you can raise at your review. Your reviewer will probably help you to identify others.

You've also now done some thinking about learning and personal development activities that you'd like to undertake – **WILL DO**.

The final part of your preparation is **HOW TO** – identifying the learning opportunities that will help you to meet your **WILL DO** requirements.

You don't want to make any firm decisions about future learning and personal development at this stage as it will need to be agreed with your reviewer. But you can start to gather examples of opportunities or agencies that will be able to help so that you can introduce them into your review.

Resource 6: Further sources of advice and information about learning and personal development

National helplines

NHS learning and development service

A training, information and advice telephone helpline for staff working in health and social care sectors. All calls are free and confidential. It has a special KSF support service which is accessed on the same number.

Tel: 08000 150 850

Email: learning@nhscareers.nhs.uk

learndirect

learndirect is a government-funded national telephone information and advice service for learning and development. Referrals can also be made to local 'next step' services for further support and help.

Tel: 0800 100 900

www.learndirect.co.uk

Careers in the NHS

Information about entry requirements and professional careers and job opportunities in the NHS.

Tel: 0845 60 60 655

www.nhscareers.nhs.uk

Health Professions Council

Many career opportunities are regulated by professional bodies that are a source of information about entry requirements and further career development opportunities. The Health Professions Council has recently been established and is responsible for regulation of 13 of the professions. The Health Professions Council website below links to professional associations for each of these careers.

www.hpc-uk.org

Careers in social work and social care

Information about entry into professional social work and into social care employment more widely.

Tel: 0845 604 6404

www.socialworkcareers.co.uk

Learning Activity 14: Sources of advice and information about further development

Enter the name of the person responsible for advising staff about learning and personal development:

Add the name of your union learning representative or advisor:

Using the lists on the previous pages, and undertaking your own research, identify some national and local agencies that you might contact and describe briefly what information/advice you would hope to get from them.

Now transfer this information to the **HOW TO** section of your 'Evidence of learning and personal development' grid.

Your 'Evidence of learning and personal development' grid should now look something like the Mark Tanner example on page 19. Ideally, you should now use the **CAN DO, WILL DO, HOW TO** approach to the other core NHS KSF dimensions listed in your NHS KSF job outline.

Summary of Section 3

In this section you have started to think about your learning and personal development needs. You have started to identify your personal achievements and how these match the NHS KSF Communication dimension. You have identified areas that you would like to develop and know about at least two agencies that can be a source of advice and information.

The final section, which follows, discusses the Personal Development Plan.

Section 4: Personal development planning

What's a Personal Development Plan?

In the previous section you have outlined your learning achievements and probable learning and development needs. That's really good, but how are you going to make sure they happen?

At your PDR interview you will agree a Personal Development Plan (PDP) with your reviewer. You will find a copy of the plan you are likely to use on page 28. Have a look at this now.

You will see that it takes the form of a **written statement of intention** that sets out:

- the stage you are currently at (**CAN DO**)
- where you would like to be (**WILL DO**)
- the steps you need to get there (**HOW TO**)
- the support that will be required.

Learning Activity 15: PDP (1)

In box 1 in the PDP, write one example of the learning and development that you would like to achieve. You will find this in your 'Evidence of learning and personal development' grid.

What's particularly important about a PDP is that it's not just a reflection of what you've achieved already – it becomes a commitment to do something more. Frequently in our lives we keep meaning to do something but tend to put it off. A written PDP makes us cross the border from hope to intention. Cross the border now by completing Learning Activity 16.

Resource 7: PDP

Relevant dimension	What is the development need/ interest?	What will I do to develop myself?	How will I know I have done this?	What is the planned date for completion?	What support do I need and where will I get it?	What are the barriers and how can I overcome them?
Communication	1	2	3	4	5	6

Signature of individual:	Date:	Name of individual:
Signature of reviewer:	Date:	Name of reviewer:

Learning Activity 16: PDP (2)

Complete the other boxes marked 2–6 in the PDP above with regard to the learning development you’ve identified. Be realistic about the date by which you’re likely to complete it and be clear about the support you need and the barriers that may be in your way.

Another important feature of making that commitment is agreeing with your reviewer a date by which you intend to carry out your plan. Because you will have a PDR at least once a year, you will always be planning to do something in the year ahead. You and your reviewer will jointly make the final decisions about the content of your PDP.

A SMARTER plan

- S – specific
- M – measurable
- A – achievable or agreed
- R – realistic
- T – time-bound
- E – evaluated
- R – repeated

Because you want your plan to happen, it has to be **SMARTER**.

- It will be **specific**, describing the desired outcome in as much detail as possible.
- It will be **measurable** if you can identify what measures will be used to judge whether or not this has been achieved.
- It will be **achievable** if it reflects the way you enjoy learning, and the objectives should be **agreed** because the more say you have in setting the goals, the more likely you are to achieve them.
- It will be **realistic** if it builds on personal development opportunities that can be taken up at work.
- It will be **time-bound** if it can be completed before next year’s PDR! And some additional milestones might be set to help in monitoring your progress.
- It will be **evaluated** to see how successful you were – and this should happen as part of ongoing monitoring, not just in time for your next PDR!
- Following the evaluation, the process will be **repeated** to see whether new goals should be set.

Although your PDP is important, remember that it is only part of a process that results from thinking about your achievements and considering how you want to develop your career. As your thinking shifts and changes, so will your PDP.

People’s plans will be **SMARTER** for different reasons. Your PDP has to reflect your circumstances.

Learning Activity 17: A SMARTER plan

Take your draft PDP and say below why it fits the **SMARTER** template.

It is specific because... _____

It is measurable because... _____

It is achievable and agreed because... _____

It is realistic because... _____

It is time-bound because... _____

It will be evaluated (when)... _____

It will be repeated (when)... _____

Owning the plan

In the PDR process you will be completing your PDP with your reviewer. Your reviewer will help you consider your personal strengths, weaknesses and aptitudes, explore personal development opportunities, and give ongoing support to any development activities you decide to undertake.

Remember though that this is **your** PDP, for which you have to take responsibility.

Learning Activity 18: Completing your PDP

Add into the plan any further learning you have achieved or wish to complete. In the space below, identify the main personal development you want to undertake in the next 12 months and say why you want to do this.

Think again about what support from your organisation will help you achieve this – eg a mentor or some study time – and jot it down here.

Complete your PDP by including this information in it.

Summary of Section 4

Congratulations on completing this section. We hope you now understand more about the PDR process and are confident about using it to develop your skills and knowledge.

Section 5, which concludes this workbook, contains:

- an additional 'Evidence of learning and personal development' grid that you can use for the other NHS KSF dimensions
- the answers to Learning Activities 1 and 3.

Section 5: Additional materials

Evidence of learning and personal development

NHS KSF dimension: _____

Level: _____

Indicators	<i>CAN DO</i>	<i>WILL DO</i>	<i>HOW TO</i>
a)	a)	a)	a)
b)	b)	b)	b)
c)	c)	c)	c)
d)	d)	d)	d)
e)	e)	e)	e)

Learning Activity 1: A quick NHS KSF quiz (1)	
Questions	Answers
1 Write down one purpose of the NHS KSF.	There are four possible answers: <ul style="list-style-type: none"> • develop the knowledge and skills of staff to improve services • support the effective learning and development of individuals and teams • support the development of individuals in the post in which they are employed so that they can be effective at work • promote equality for and diversity of all staff.
2 How many core dimensions are there?	Six.
3 Which dimensions will definitely appear in your NHS KSF outline?	The core dimensions.
4 What does a level title do?	It describes how knowledge and skills need to be applied.

Learning Activity 3: A quick NHS KSF quiz (2)	
Questions	Answers
1 Give an example of how indicator f) in the NHS KSF dimension on page 3 would be applied to the post.	There are four possible answers: <ul style="list-style-type: none"> • during induction • during ongoing work • to students on placement • when changes are being made to work practices.
2 What has happened under Agenda for Change?	Most NHS staff have switched to a common pay spine, where jobs are allocated to specific pay bands covering a number of pay points.
3 When do the pay gateways happen?	The foundation gateway happens no later than 12 months after an individual is appointed to a pay band. The second gateway is set at a fixed point towards the top of a pay band.