



**Workforce**

**Personal Development Planning and  
Performance Review Policy: guide  
for employees**

This guide will help you understand the Personal Development Planning and Performance Review Policy. The guide will help you engage with appraisal, personal development planning and associated activities. This helps to make sure you have the necessary skills and knowledge to deliver the required standards of your role.

The following guide forms part of the standard for workforce policies. These policies apply to all eligible employees within NHSScotland, regardless of the board they are employed by. The guide covers:

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# What is the purpose of the Personal Development Planning and Performance Review Policy?

The Personal Development Planning and Performance Review Policy supports you to have the skills and knowledge needed for your role. It also provides a framework to actively participate in appraisal, personal development planning and related activities.

## Who is covered by this policy?

This policy applies to all employees and bank and sessional workers. References to employees should be taken to apply to bank and sessional workers unless otherwise stated.

## Possible benefits

It is recognised that regular performance reviews and personal development planning will:

- Increase your understanding of your role.
- Clarify expectations of you within the role.
- Encourage your manager to share ownership of your learning and development, including continuing professional development (CPD), and a career plan.
- Improve communication and build more effective working relationships between you and your manager.
- Support your wellbeing through focused conversation to understand your development needs.
- Increase the effectiveness of the organisation's performance by aligning your objectives to service delivery plans.

## Appraisal systems

There are 3 different appraisal systems depending on your staff group. These are:

- Agenda for Change - [Turas Appraisal](#)
- Medical and Dental - [Scottish Online Appraisal Resource \(SOAR\)](#)
- Executive and senior managers - [Turas Appraisal](#)

Completing your PDPs and performance reviews on the appropriate system is required to maintain individual records of the process and produce organisation-level data.

## **Feedback**

The personal development planning and performance review process provides a clear framework for your manager or reviewer to give you feedback and support.

Your manager or reviewer should meet with you to discuss your progress and provide any feedback. This should be at least annually and in line with the requirements of the relevant appraisal scheme.

There should be no surprises at your annual performance review. Regular meetings, both informal and formal, provide an opportunity to discuss any issues or challenges.

Your manager or reviewer should address any issues affecting your performance as they arise. This provides you with the opportunity to discuss any issues affecting your performance and any support required.

## **Performance review**

The manager or reviewer should meet with you to discuss your performance over the review period, which usually covers a 12 month period. For some employees, this will also include a mid-year review. Your manager should agree on a date for both the mid-year and end of year review and provide you with sufficient time to prepare.

You and your reviewer should discuss:

- what went well
- what could have gone better
- what difference do you want to make next year

## **Objectives**

You and your manager should agree on a number of work objectives for the following 12 months. The number may be specified depending on your staff group. However, emphasis should be placed on the quality of the objectives. Your objectives should be Specific, Measurable, Achievable, Relevant, and Time-bound (SMART). Objectives should also reflect organisational priorities and needs.

**Specific** is to make sure the objective is detailed, focused and well defined.

**Measurable** is to make sure the objective has a measure of success that is understandable.

**Achievable** is to make sure the objective is challenging but achievable within available resources

**Relevant** means making sure the objective is realistic and relevant to you, your team, and your organisation.

**Time-bound** is to make sure the objective has a deadline or specific time frame to be achieved.

Your objectives should inform ongoing discussions, appraisal, and PDP for the coming year.

## **Personal Development Plan (PDP)**

You should agree on a learning and development plan for the coming year with your manager's support. This plan is often referred to as a Personal Development Plan (PDP).

The plan should reflect your work priorities and objectives and any areas for improvement identified in your performance review. Statutory and mandatory training requirements are a key element of personal development. Like objectives, any areas identified should be specific and time-bound.

The immediate requirements of the PDP relate to the requirements of the current role. However, consideration can also be given to your wider development and career aspirations where possible. Your manager should support you to access appropriate learning and development.

The PDP process can also support you to produce the required evidence for revalidation.

## **Appraisal sign off**

This is when you and your reviewer confirm that your appraisal discussion has taken place and that you are both in agreement with what is recorded.

# Resolution of disagreements

Should a disagreement arise, you should discuss this with your manager in the first instance. If the concern is not resolved, it may be appropriate for either party to seek advice on resolving the matter from HR or a trade union representative.

You should seek early resolution wherever possible. You also have the right to raise matters under the [Grievance Policy](#).