

## Personal Development Plan (PDP) and Management Supervision Record

This process is designed to provide staff with a forum to discuss their performance and personal development objectives through a structured process that is regularly reviewed to support continuous development.

Personal objectives will be set and agreed at the end of or beginning of the year. Management Supervision 1:1 meetings will be held in Quarters 1, 2, 3, and 4 to ensure that:

- There is a discussion about the employee's performance against the standards they are expected to meet
- The employee is clear about their roles and responsibilities
- The employees personal development needs are identified and addressed
- The employee is encouraged to reflect upon challenges and achievements
- The employee can share any issues or concerns

Personal objectives can be reviewed and monitored at 1:1 meetings and should be evaluated at the Quarter 4 (end of year) meeting.

This form should be completed electronically and submitted to Human Resources following each meeting, demonstrating that both employee and manager are satisfied with the contents by ensuring both parties are copied into the email and have added their name to the declaration under each meeting section.

<b>Name of employee:</b>	
<b>Service/team:</b>	
<b>Manager:</b>	
<b>Date of objective setting (end/start of year):</b>	

PERSONAL DEVELOPMENT OBJECTIVES		
Task and behavioural objectives – (include timescales as appropriate and refer to Behaviour Wheel in appendix 1)	Review (please enter date reviewed)	End of year/Quarter 4 review
<b>SAFE</b> <i>Putting people at the heart of all we do</i>		
<b>CARING</b> <i>Being the provider of choice</i>		
<b>WELL LED</b> <i>Being the employer of choice</i>		
<b>RESPONSIVE</b> <i>Being the partner of choice</i>		

<b>EFFECTIVE</b> <i>Being clinically effective and achieve good outcomes Being a sustainable business and grow in a competitive market</i>		
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TRAINING REQUIREMENTS		
Outstanding Statutory and Mandatory Training	Date of training planned	Date completed

Personal Development Training	Date of training planned	Date completed

PERFORMANCE FRAMEWORK Start of year (Quarter 1) placement								
Performance Framework	Under Performer	Inconsistent Performer	New to Role	Developing Performer	Consistent Performer	Strong Developing Performer	Strong Performer	Aspirational Performer
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DISCUSSION AND COMMENTS
<b>Managers comments:</b>
<b>Employee's comments:</b>

DECLARATION	
<i>We agree that the contents of this record reflect our discussion: (once agreed, please email the document to Human Resources, copying both manager and employee in the email)</i>	
Manager – Name and date	Employee – Name and date
Date agreed for Quarter 1 Review:	

QUARTER 1 MANAGEMENT SUPERVISION	
<b>Date of discussion:</b>	
<i>(If these areas have been <b>discussed</b> and <b>recorded</b> within quarterly service specific supervision, please indicate below, noting that the record may be requested as part of the JCC inspection, alternatively, please record comments below)</i>	
Discussion (JCC Requirement)	Comments/Issues
Performance against the expected standards	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is clear about their roles and responsibilities	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employees personal development needs are identified and addressed	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is encouraged to reflect upon challenges and achievements	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee can share any issues or concerns	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)

PERFORMANCE FRAMEWORK Quarter 1 Review								
Performance Framework	Under Performer	Inconsistent Performer	New to Role	Developing Performer	Consistent Performer	Strong Developing Performer	Strong Performer	Aspirational Performer
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DISCUSSION AND COMMENTS
<b>Managers comments:</b>
<b>Employee's comments:</b>

DECLARATION	
<i><b>We agree that the contents of this record reflect our discussion:</b> (once agreed, please email the document to Human Resources, copying both manager and employee in the email)</i>	
<b>Manager – Name and date</b>	<b>Employee – Name and date</b>
<b>Date agreed for Quarter 2 Review:</b>	

QUARTER 2 MANAGEMENT SUPERVISION	
<b>Date of discussion:</b>	
<i>(If these areas have been <b>discussed</b> and <b>recorded</b> within quarterly service specific supervision, please indicate below, noting that the record may be requested as part of the JCC inspection, alternatively, please record comments below)</i>	
Discussion (JCC Requirement)	Comments/Issues
Performance against the expected standards	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is clear about their roles and responsibilities	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employees personal development needs are identified and addressed	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is encouraged to reflect upon challenges and achievements	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee can share any issues or concerns	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)

PERFORMANCE FRAMEWORK Quarter 2 Review								
Performance Framework	Under Performer	Inconsistent Performer	New to Role	Developing Performer	Consistent Performer	Strong Developing Performer	Strong Performer	Aspirational Performer
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DISCUSSION AND COMMENTS
<b>Managers comments:</b>
<b>Employee's comments:</b>

DECLARATION	
<i><b>We agree that the contents of this record reflect our discussion:</b> (once agreed, please email the document to Human Resources, copying both manager and employee in the email)</i>	
<b>Manager – Name and date</b>	<b>Employee – Name and date</b>
<b>Date agreed for Quarter 3 Review:</b>	

QUARTER 3 MANAGEMENT SUPERVISION	
<b>Date of discussion:</b>	
<i>(If these areas have been <b>discussed</b> and <b>recorded</b> within quarterly service specific supervision, please indicate below, noting that the record may be requested as part of the JCC inspection, alternatively, please record comments below)</i>	
Discussion (JCC Requirement)	Comments/Issues
Performance against the expected standards	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is clear about their roles and responsibilities	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employees personal development needs are identified and addressed	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is encouraged to reflect upon challenges and achievements	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee can share any issues or concerns	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)

PERFORMANCE FRAMEWORK Quarter 3 Review								
Performance Framework	Under Performer	Inconsistent Performer	New to Role	Developing Performer	Consistent Performer	Strong Developing Performer	Strong Performer	Aspirational Performer
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DISCUSSION AND COMMENTS
<b>Managers comments:</b>
<b>Employee's comments:</b>

DECLARATION	
<i>We agree that the contents of this record reflect our discussion: (once agreed, please email the document to Human Resources, copying both manager and employee in the email)</i>	
Manager – Name and date	Employee – Name and date
Date agreed for Quarter 4 Review:	

END OF YEAR REVIEW/QUARTER 4 MANAGEMENT SUPERVISION	
<b>Date of discussion:</b>	
<i>(If these areas have been <b>discussed</b> and <b>recorded</b> within quarterly service specific supervision, please indicate below, noting that the record may be requested as part of the JCC inspection, alternatively, please record comments below)</i>	
Discussion (JCC Requirement)	Comments/Issues
Performance against the expected standards	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is clear about their roles and responsibilities	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employees personal development needs are identified and addressed	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee is encouraged to reflect upon challenges and achievements	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)
The employee can share any issues or concerns	Discussed and recorded in service supervision Yes <input type="checkbox"/> No <input type="checkbox"/> (if no please comment)

PERFORMANCE FRAMEWORK Quarter 4 Review								
Performance Framework	Under Performer	Inconsistent Performer	New to Role	Developing Performer	Consistent Performer	Strong Developing Performer	Strong Performer	Aspirational Performer
Manager	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Employee	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

DISCUSSION AND COMMENTS
<b>Managers comments:</b>
<b>Employee's comments:</b>

DECLARATION	
<i>We agree that the contents of this record reflect our discussion: (once agreed, please email the document to Human Resources, copying both manager and employee in the email)</i>	
Manager – Name and date	Employee – Name and date
Date agreed for Objective Setting/Quarter 1 Review:	

FURTHER COMMENTS/NOTES <i>(Please include date)</i>	
SENIOR MANAGER REVIEW / COMMENTS	
Name of Senior Manager:	Date:
Name of Senior Manager:	Date:

## APPENDIX 1. BEHAVIOURAL WHEEL





